

What is RDA?

Alan Danskin

What is RDA?

RDA provides guidelines and instructions for description of and access to resources

Principles based

- *IFLA Statement of International Cataloguing Principles (ICP)*

RDA is an implementation of IFLA models

- *Functional Requirements for Bibliographic Records (FRBR)*
- *Functional Requirements for Authority Data (FRAD)*

Developed from *AACR2* & *ISBD* traditions

What is RDA?

RDA is comprehensive in scope

Covers all material types

Description

Access – authority control

General

Subjects

What is RDA?

A product

- RDA Toolkit

- Print RDA

- LC Cataloger's Desktop

A community

- User contributed content

- RDA-L

- RDA Registry

- EURIG

RDA is not

A schema ...e.g. MARC 21, XML

A display format...e.g. ISBD

RDA can be used independently of any schema or display format.

Introducing RDA

British Library
RDA @ Reykjavik, 21-22 May, 2015

Contents

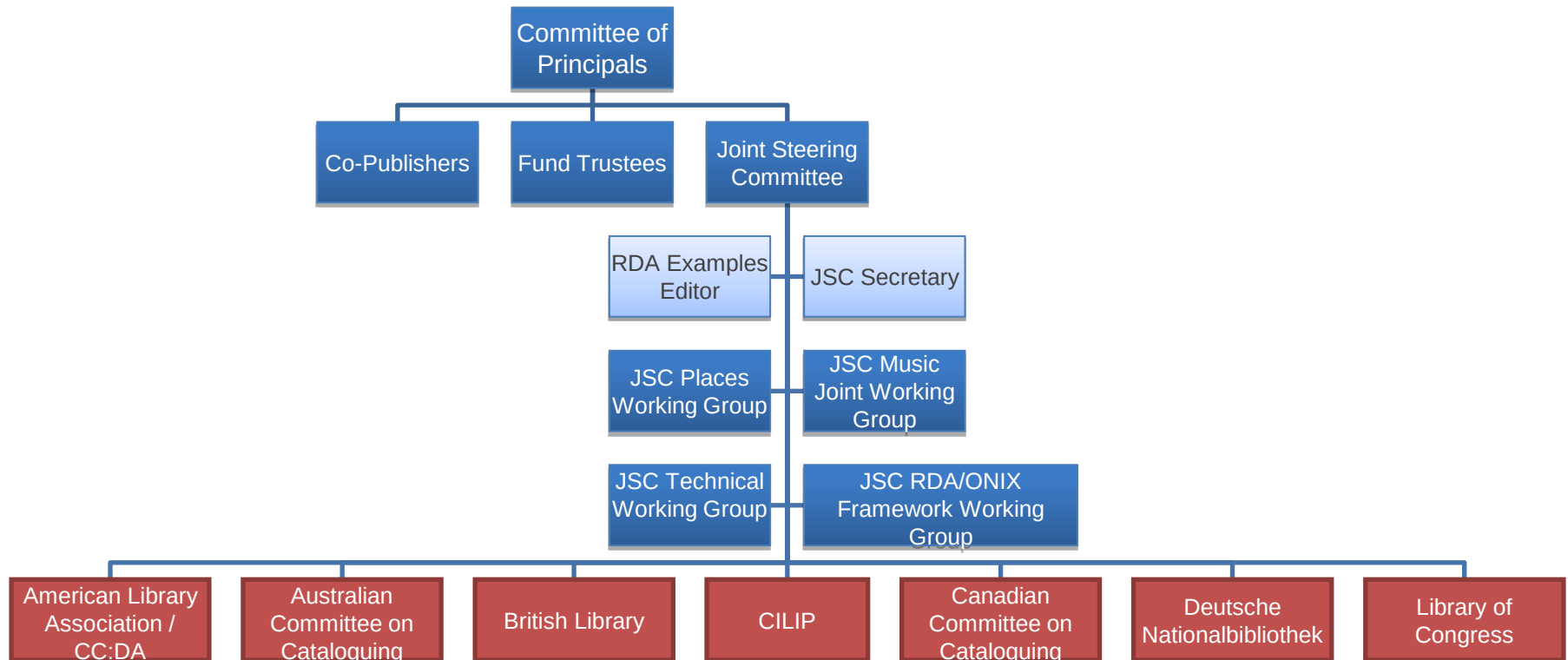
- RDA Governance and Development
- RDA Primer
 - Vocabulary
 - Core Elements
 - Iteration
 - Sources
 - Transcription
 - Authorized Access Points Representing...

Introducing RDA

RDA Governance

RDA Governance Structure

Ownership	Strategy	Rule development and revision	Product Development
Co-publishers and Fund Trustees: ALA , CILIP, CLA	Committee of Principals (CoP): ALA, BL, CILIP, CLA, DNB, LAC, LC, NLA	Joint Steering Committee (JSC): ACOC, ALA, BL, CCC, CILIP, DNB, LC	ALA Publishing



JSC Working Groups

RDA/ONIX Framework WG

JSC Technical WG

JSC Places WG

JSC Music WG

JSC Capitalization Instructions WG

JSC Aggregates WG

JSC Fictitious Entities WG

JSC Relationship Designators WG

JSC Washington, D.C., 2014



L-R: Simon Edwards (Chair of CoP; Judy Kuhagen (JSC Secretary); Alan Danskin (BL); Kathy Glennan (ALA); Susanne Oehlschlaeger (DNB); Ebe Kartus (ACOC); Gordon Dunsire (Chair of JSC) + Galen Jones (CILIP); Bill Leonard (CCC); Dave Reser (LC); Kate James (Examples Editor, LC)

Changing RDA

JSC

Constituencies

Communities

Working Groups

Annual cycle

Proposals

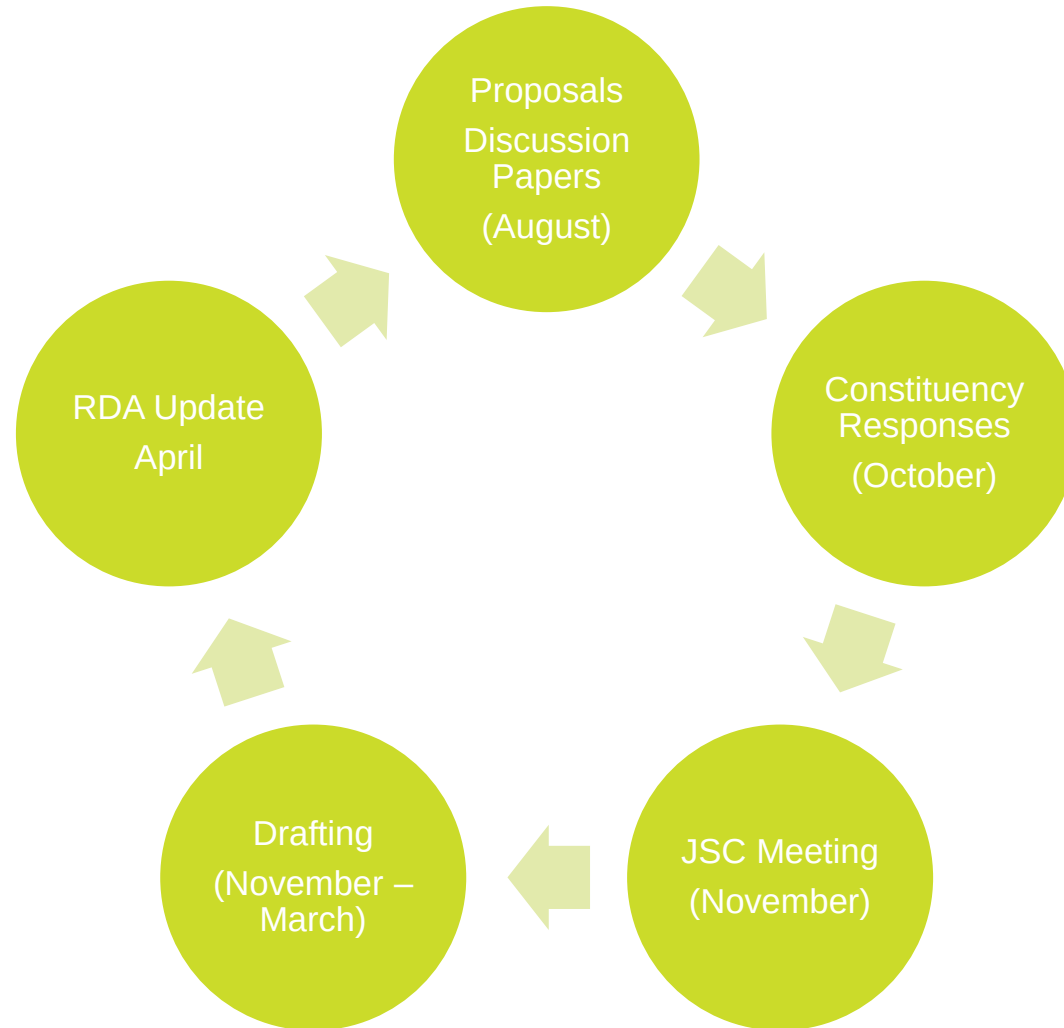
Discussion Papers

Responses

Fast Tracks

JSC Meeting

The development cycle



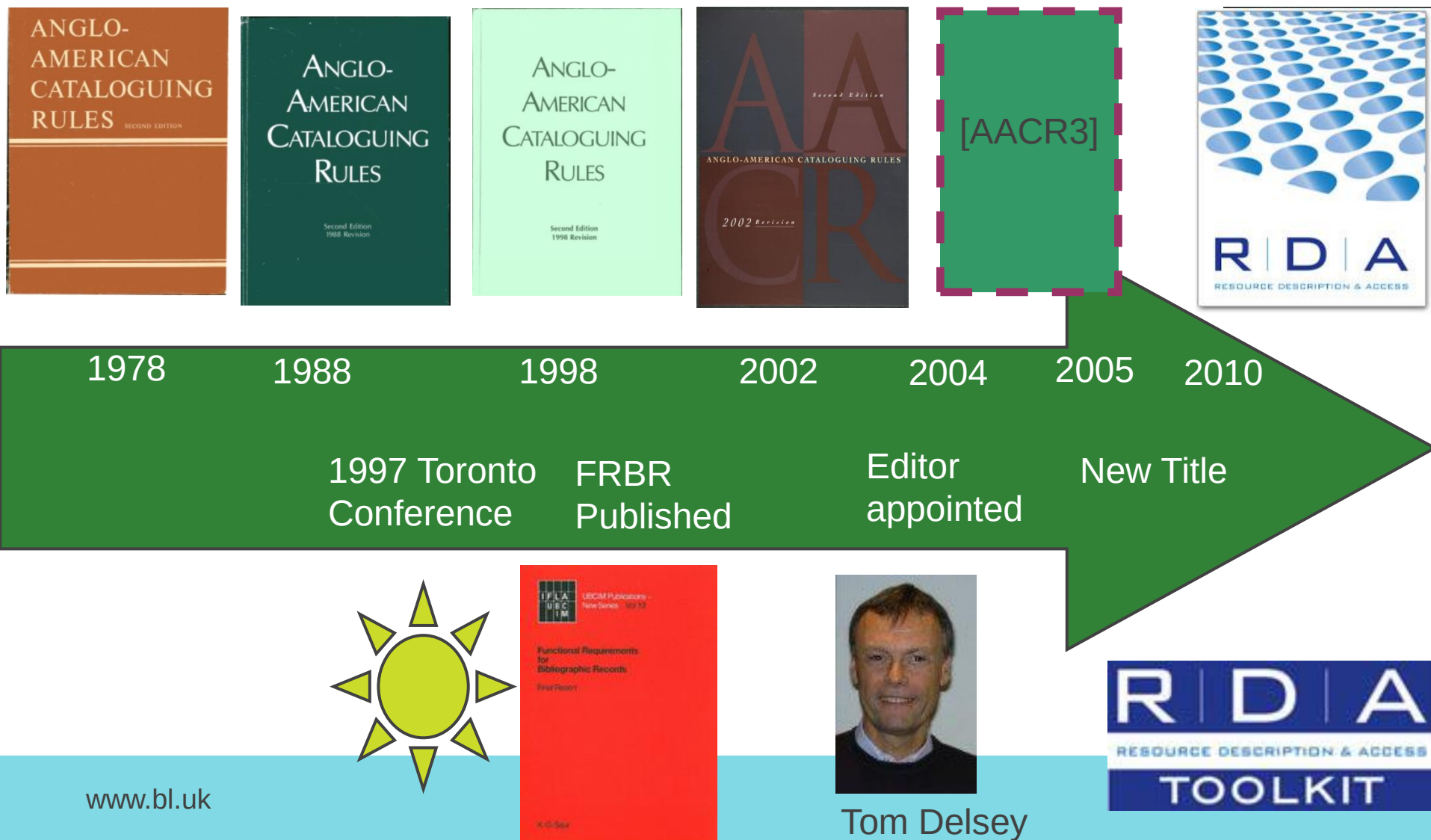
JSC Working Principle

COP	IFLA	Toolkit changes
Strategy Review	FR Consolidation:	RDA Development team
Governance	ISBD Strategy and review	Content management system
JSC Membership		RDA Registry
		Non MARC carriers
Moratorium on implementation of short term changes		
Greater focus on broader range of entities		
Prefer relationships to attributes		

Introducing RDA

RDA Development

From AACR2 to RDA



Why RDA?

AACR seen as no longer fit for purpose

Cataloguing environment

Communications Technology

Changing expectations

From Panizzi to Facebook



The Problems with AACR2

Lack of logical structure

- Mix of content and carrier data

- Hierarchical relationships are missing

- Increasingly complex

- Anglo-American bias

- Pre-dates FRBR

- Not designed for Internet

- No well-formed metadata or vocabularies

The Cataloguing Environment -- Internet

- Catalogues are no longer in isolation
 - Global access to data
 - ‘linked data systems’
- Integrate bibliographic data with wider Internet environment
 - Share data beyond institutions
 - Any user – any place – any time



www.brl.uk



The Cataloguing Environment -- Current

- Web-based
- Wide range of information carriers
- More types of content and complexity of content
- Metadata (bibliographic information)
 - Created by a wider range of personnel in and outside libraries
 - Element-based metadata schemas
 - Dublin Core, ONIX, etc.

RDA: A Tool for the Digital World

Optimised for use as an online product

RDA Toolkit

Description and access of all resources

All types of content and media

Resulting records usable in the digital environment
(Internet, Web OPACs, etc.)

Resulting records readily adaptable to newly
emerging database structures

International

EURIG: European RDA Interest Group



„Any European national library and/or bibliographic centre or other institution which is responsible for the use and implementation of the cataloguing code in its country may be a member of the Group.”

(EURIG Cooperation Agreement, Article 3)

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INTRODUCTION

0.0 Purpose and Scope LC-PCC PS NLA PS D-A-CH MLA

RDA provides a set of guidelines and instructions on recording data to support resource discovery.

The data created using RDA to describe a resource are designed to assist users performing the following tasks:¹

find—i.e., to find resources that correspond to the user's stated search criteria

identify—i.e., to confirm that the resource described corresponds to the resource sought, or to distinguish between two or more resources with similar characteristics

select—i.e., to select a resource that is appropriate to the user's needs

obtain—i.e., to acquire or access the resource described.

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INTRODUCTION

0.0 Objectif et champ d'application

RDA fournit un ensemble de lignes directrices et d'instructions sur la formulation de données visant à favoriser la découverte de ressources.

Les données créées en utilisant RDA pour décrire une ressource sont conçues pour aider les utilisateurs à réaliser les tâches suivantes¹ :

trouver — c'est-à-dire trouver des ressources correspondant aux critères de recherche établis par l'utilisateur

identifier — c'est-à-dire confirmer que la ressource décrite correspond à la ressource recherchée ou bien faire la distinction entre deux ou plusieurs ressources possédant des caractéristiques semblables

sélectionner — c'est-à-dire sélectionner une ressource pertinente pour les besoins de l'utilisateur

acquérir — c'est-à-dire acquérir ou atteindre la ressource décrite.

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INTRODUCCIÓN

0.0 Propósito y Alcance LC-PCC PS MLA NLA PS D-A-CH

RDA proporciona un conjunto de pautas e instrucciones sobre el registro de datos que apoyan la localización de recursos.

Los datos creados mediante el uso de RDA para describir un recurso están diseñados para ayudar a los usuarios en la realización de las siguientes tareas:¹

encontrar—i.e., encontrar recursos que correspondan a los criterios de búsqueda establecidos por el usuario

identificar—i.e., confirmar que el recurso descrito corresponde al recurso buscado, o para distinguir entre dos o más recursos con características similares

seleccionar—i.e., seleccionar un recurso que es apropiado para las necesidades del usuario

obtener—i.e., adquirir o tener acceso al recurso descrito.

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EINLEITUNG

0.0 Ziel und Geltungsbereich LC-PCC PS NLA PS D-A-CH MLA

RDA stellt ein Set von Richtlinien und Bestimmungen zum Erfassen von Daten bereit, die das Auffinden von Ressourcen unterstützen sollen.

Daten, die unter Verwendung von RDA zur Beschreibung einer Ressource erzeugt werden, sollen die Benutzer bei den folgenden Anforderungen unterstützen:¹

Finden - d. h. Ressourcen finden, die den vom Benutzer festgelegten Suchkriterien entsprechen

Identifizieren - d. h. bestätigen, dass die beschriebene Ressource der gesuchten entspricht, oder zwischen mehreren Ressourcen mit ähnlichen Eigenschaften unterscheiden

Auswählen - d. h. eine Ressource auswählen, die den Bedürfnissen des Anwenders entspricht

Zugang erhalten - d. h. die beschriebene Ressource erwerben oder Zugang zu ihr erhalten.

Introducing RDA

Vocabulary, Conventions, etc.

RDA Primer

Element

A word, character, or group of words and/or characters representing a distinct unit of bibliographic information.

Note

An element in which additional information about a specific attribute may be recorded

RDA Primer

Access Point

A name, term, code, etc., representing a specific entity.

Authorized Access Point

The standardized access point representing an entity

Variant Access Point

An alternative to the authorized access point representing an entity

RDA Primer

Relationship designator

A designator that indicates the relationship between entities represented by authorized access points, descriptions and/or identifiers

Rowling, J.K. **author of** Harry Potter and the Chamber of Secrets

RDA Primer

Cataloguer judgement

Instructions cannot anticipate every possible question. Cataloguers are encouraged to employ their understanding of the underlying principles in the application of RDA

Supplied Data

A piece of information from outside the resource, provided by the cataloguer

RDA Primer

PFC

An abbreviation for Person, Family, and Corporate Body.

PPDM

An abbreviation for Production, Publication, Distribution, Manufacture Statements

Agent

Another way of referring to Person, Family, and Corporate Body

RDA Primer

Instruction types

Alternative: may be used instead of the preceding instruction

Optional addition: of data that supplements that called for in the preceding instruction

Optional omission: of data specified by the preceding instruction

Exception: used instead of the preceding instruction, subject to conditions

Core Elements

“Core is the floor, not the ceiling”

Core elements were selected according to the FRBR/FRAD assessment of their value in supporting user tasks

Core

Core if...

Core elements are required if applicable and readily ascertainable

RDA **0.6** for more information

Iteration

If there is more than one instance of an attribute, RDA allows you to:

- Record them all
- Record some
- Record the first
- Record none (unless core)

There is no “Rule of Three” in RDA

Sources: Overview

Preferred source: source of title proper

Sources for information

- Whole resource, with priority order
- Then any other source

Indicate if from outside the resource (e.g. brackets)

- Exception: if information is typically supplied

Three categories (RDA **2.2.2.2 – 2.2.2.4**)

- Pages, leaves, etc., or images of pages ...
- Moving images
- All other resources

Sources: Comprehensive Description

2.1.2.2: Resources issued as a single unit

The resource is the preferred source

2.1.2.3: Resources issued in more than one part

Generally, choose the lowest numbered/earliest part

2.1.2.4: Integrating Resource

Choose a source of information identifying the current iteration

Sources: Resources with Pages, Leaves, etc.(or images of pages, leaves, etc.)

RDA **2.2.2.2** priority order:

- Title page, title sheet, etc.
- Cover
- Caption
- Masthead
- Colophon
- If none of these, source containing title

If no title, source with formal presentation

Exception for Early Printed Resources

Sources: Moving Images

RDA 2.2.2.3

Title frame(s), or title screen(s)

If only individual contents listed, use a formally presented collective title from elsewhere in resource

Alternative to use permanent label on resource

If no title frame or screen, RDA has separate instructions for:

- Tangible resources
- Online resources

Sources: Other Resources

RDA 2.2.2.4

There are different guidelines for:

- **2.2.2.4.1** Tangible Resources
- **2.2.2.4.2** Online Resources

Apply to resources that are not covered by:

- **2.2.2.2** Resources Consisting of One or More Plates, Leaves, Sheets, or Cards
- **2.2.2.3** Resources Consisting of Moving Images

Sources: Other Sources of Information

RDA 2.2.4

Sources of information outside the resource

Priority order

- Accompanying materials
- Other published descriptions
- Container not issued with the resource itself
- Any other source (e.g., a reference source)

Transcription

'Take What You See and Accept What You Get'

ICP Principle of Representation

Generally, do not alter what is on the resource

- Accurate representation
- Encourage re-use of found data

Transcription: Transcribed Elements vs. Recorded Elements

Distinction between transcribed elements and recorded elements.

- For transcribed elements, generally accept the data as found on the resource.
- For recorded elements, the found information is often adjusted (for example, the hyphens in an ISBN are omitted).

Transcription: Language and Script

RDA 1.4

- “Transcribe ... in the language and script found in the resource”
- List of elements to be transcribed

RDA

RDA Table of Contents

- + 0: Introduction
- Section 1: Recording Attributes of Manifestation & Item
 - 1: General Guidelines on Recording Attributes of Manifestations and Items
 - 1.0 Scope
 - + 1.1 Terminology
 - 1.2 Functional Objectives and Principles
 - 1.3 Core Elements
 - 1.4 Language and Script**
 - + 1.5 Type of Description
 - + 1.6 Changes Requiring a New Description
 - + 1.7 Transcription
 - + 1.8 Numbers Expressed as Numerals or as Words
 - + 1.9 Dates
 - + 1.10 Notes
 - 1.11 Facsimiles and Reproductions
 - 2: Identifying Manifestations and Items
 - 2.0 Purpose and Scope
 - + 2.1 Basis for Identification of the Resource
 - 2.2 Sources of Information
 - 2.2.1 Application
 - 2.2.2 Preferred Source of Information
 - 2.2.2.1 General Guidelines
 - 2.2.2.2 Resources Consisting of

[1] 2

1.4 Language and Script LC-PCC PS

Record the following elements in the language and script in which they appear on the sources from which they are taken:

Title

Title proper

Parallel title proper

Other title information

Parallel other title information

Variant title

Earlier title proper

Later title proper

Key title

Abbreviated title

Statement of responsibility

Statement of responsibility relating to title proper

Parallel statement of responsibility relating to title proper

Edition statement

Designation of edition

Parallel designation of edition

Transcription: Choices

RDA 1.7

1.7.1 General Guidelines on Transcription

Alternative instructions

- Follow local policy
- Style Manual
- Accept without modification:
 - Derived record
 - Data derived from digital source

Transcription: Capitalization

Accepting found capitalization:

```
245 10 $a Cairo : $b THE CITY VICTORIOUS /  
    $c Max Rodenbeck.  
250 ## $a FIRST VINTAGE DEPARTURES EDITION.
```

Changing found capitalization:

```
245 10 $a Cairo : $b the city victorious /  
    $c Max Rodenbeck.  
250 ## $a First Vintage Departures edition.
```

These are equally acceptable in RDA

Non Transcribed Elements

Non-transcribed elements

- When recording other elements (e.g., extent, notes), record them in the language and script preferred by the agency creating the data
- When adding data within an element, record it in the language and script of the element to which it is added
- When supplying an element, generally supply in the language of the agency, e.g. English

Authorized Access Points Representing...

The standardized access point representing an entity

...one of the methods by which an entity can be identified

They are constructed by stringing together attributes that identify the entity

For example:

Eliot, T. S. (Thomas Stearns), 1888-1965

Name of the Person

Fuller form of Name

Date of Birth-Date of
Death

9.5 Fuller Form of Name NLA PS

CORE ELEMENT

A fuller form of name is a core element when needed to distinguish a person from another person with the same name.

9.5.1 Basic Instructions on Recording Fuller Forms of Names

9.5.1.1 Scope

A **fuller form of name**▼ is the full form of:

- a) a part of a name represented only by an initial or abbreviation in the form chosen as the preferred name,

or

- b) a part of the name not included in the form chosen as the preferred name.

9.19.1.4 Fuller Form of Name D-A-CH

Add a fuller form of the person's name (see **9.5 RDA**) if needed to distinguish one access point from another. Make this addition when the person's date of birth or date of death is not available (see **9.19.1.3 RDA**).

Using RDA

RDA Toolkit

Contents

RDA Toolkit

MARC 21 & RDA

Cataloguers' Perspective

Managers' Perspective

Using RDA

Accessing the RDA Toolkit

<http://www.rdatoolkit.org/> (Toolkit website)

<http://access.rdatoolkit.org/> (RDA content)

USING RDA

MARC 21 & RDA

RDA & MARC

- RDA designed to implement FRBR
- RDA intended to exploit potential of Web
- Most implementations in MARC
 - MARC 46 years old
- MARC 21 has adapted to RDA but cannot deliver full benefit
 - Does not identify separate entities
 - Does not separate content and carrier
 - Semantics may be implicit in position or order of information



Composite Records

- Starting point is the item in hand
- Using MARC 21 we create a composite record to:
 - Identify and describe the manifestation
 - Identify and describe the content (work and expression)
 - Identify and describe a specific copy (item)
 - Relate to other resources, persons, families, corporate bodies, etc.
 - Assign subject indexing and classification as usual

Anatomy of an RDA record in MARC

1XX/240 = work & expression [contained]

245-264, 490 = manifestation

300 = expression, manifestation

3XX = work, expression, manifestation

5XX = work, expression, manifestation

700-730 = work & expression [related]

760-787 = work, expression, manifestation [related]

8XX = work & expression [related] manifestation & item

New MARC Fields

Several new MARC fields introduced to support RDA

List on MARC 21 Website:

<http://www.loc.gov/marc/RDAinMARC.html>

Most of the new fields were needed to define attributes more explicitly in the Authority Format

The RDA Toolkit contains mappings between MARC 21 and RDA.

An RDA in MARC 21 looks very similar to an AACR2 record in MARC 21

Identifying RDA Records

040 Cataloging Source

\$e = rda

Record Leader/18 Descriptive Cataloging form =

“i” if ISBD punctuation used

“ ” if ISBD punctuation is not used

Hybrid records

Policies and processes for:

Re-use of non-RDA records

Editing or updating legacy (pre-RDA) records

Serials

Multiparts

Questions?

Using RDA

Cataloguer's Perspective

Adapting to RDA

Continuity

Aleph

MARC

Cataloguing

Subject

Change

RDA templates,
Indexes

New elements, coding

Terminology, sources,
transcription, policies,
documentation

None

Separation of content and carrier

There is no General Material Designation in RDA

Replaced by

Content Type e.g. text, sound [Work, Expression]

Media Type [Manifestation]

Carrier Type e.g. volume, audio disc [Manifestation]

RDA is much better than AACR2 for digital resources

Reproductions are described in their own right in RDA

Cataloguer's judgement

Cataloguers like clarity and consistency

AACR2 “Case Law”

provided detailed guidance down to a very granular level.

RDA is clear and consistent

RDA is principles based

Rule interpretations

Example

Collaborative work
12 collaborators

No primary responsibility

AACR2

Only first three are
recorded

RDA

First named must be
recorded

Any or all others may
be recorded

BL policy: Generally record all, unless unduly onerous.

“unduly onerous” is not defined, it is left to cataloguer judgement

Using RDA

Manager's Perspective

- Preparation
- Training
- Productivity

Preparation

Communications

- Business case
- Cataloguers
- Service impacts
- Public
- Other stakeholders

Infrastructure

- Toolkit
- Documentation
- Training materials
- Systems configuration

RDA Business Case: Costs

RDA Governance & Development

- Long term commitment

Planning

- Time and opportunity costs

Lost production

- (estimated 20,000 items)

Annual Subscription

- Concurrent licenses

Business Case: Benefits

Long Term

Infrastructure

Discovery
Technology
Linked Data

Strategic Continuity

International commitments

Short Term

Better Cataloguing

- Consistency
- Authority Control
- Electronic resources
- Content / Carrier

Systems Checklist

- Aleph ILS: acquisition and cataloguing
- PRIMO: search interface
- Validation
- Researchers' tools, reference/citation management

Systems issues and changes

Import/Export profiles

Batch Upgrade (automatching)

MARC changes implemented on Aleph (95 change requests)

- Most changes affect authority records

- New indexes

- Shared configurations with UK community

- Templates / Macros

MARC Report

Very little change to PRIMO

Legacy Data

- LC NACO re-distribution of authority data
 - Additional clean-up
- Long term enhancement:
 - Identification of works and expression
 - Enrichment of attributes
 - Content, media & carrier types
- Hybrid records are a fact of life for us
 - British Museum; AACR; AACR2; “other”;
 - RDA is just the latest...

Phased implementation of RDA

Expert Groups Established	2008
Aleph Implementation Environment	2009
Re-distribution of Derived RDA Records	2012 June
Authority Control (NACO)	2012
RDA Cataloguing in Publication	2013 January
Descriptive Cataloguing (Boston Spa)	2013 Q1
Descriptive Cataloguing (London)	2013 Q1

External

- Change to CIP contract with BDS
 - switch to RDA in advance of BL implementation date
- Contractual changes with other record suppliers
 - as agreements renewed
- Legal Deposit Libraries Shared Cataloguing Programme (LDLSCP)
 - Shared documentation

Training

Mix activities

Classroom and Hands on

Check work and give feedback

Start with easy stuff to build confidence

PRODUCTIVITY

- Individual productivity targets suspended during 2013-14
- Production hit was estimated at 20k records
- Mitigation strategies kept output on target at end of year (31/3/2013)

Productivity

RDA has been neutral

No evidence for any change in productivity

Despite implementing RDA 3 days before legal deposit extended to non-print.

Production Targets

% Items processed	2013-2014 (to Feb)	2012-2013	2011-2012
All Print	104%	100%	103%
All Digital	90%	84%	107%

Comparative snapshot

Measure	October 2013	October 2012
Cataloguing Daily Rate	10.41	10.66
Copy Cataloguing daily rate	39.09	39.02
Team Authority Control %	33%	20%

Cataloguing issues

- High Level
 - Change to well established policies and procedures
 - Realising the benefits/deferral of gratification
 - Quality Assurance
- Cataloguing
 - Compilations / Collaborations
 - Cataloguer Judgement
 - “unduly onerous”
 - Authority Control productivity/demands

Future Developments

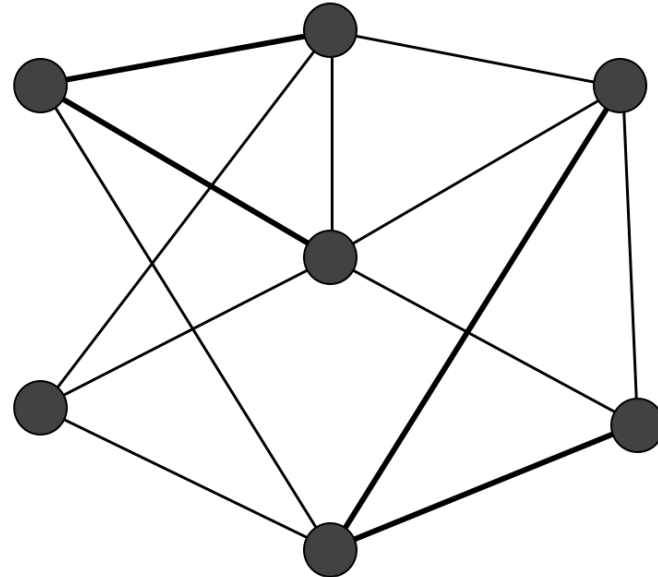
Linked Data

Linked Data

Internet = web of computers

WWW = web of documents

Next? = web of data



Linked data

RDF = Resource Description Framework

Model for the web of data



Linked data

RDF = Resource Description Framework

Model for the web of data



Linked data

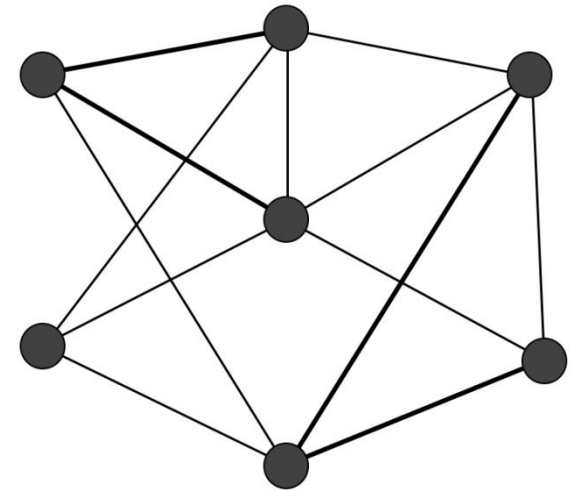
Cataloguing is really about identifying entities and explaining the relationships between them

Linked data has the potential to remove many of limitations that have constrained cataloguing in the past.

RDA identifies entities

RDA defines lots of relationships

RDA and linked data are a good match



However...

Implementations of RDA are almost all in MARC 21

MARC 21 is not a good match for linked data

The full benefits of RDA are dependent on a replacement for MARC and a new generation of systems.

This is a slow process...

Initiatives

- RDA Registry
- BIBFRAME
- RIMMF

RDA Registry

<http://www.rdaregistry.info/>

RDA Registry

- [RDA Registry](#) (Home)
- [Elements](#) (RDA element sets)
 - [Classes](#)
 - [Work properties](#)
 - [Expression properties](#)
 - [Manifestation properties](#)
 - [Item properties](#)
 - [Agent properties](#)
 - [Unconstrained properties](#)
- [Values](#) (RDA value vocabularies)
- [Data](#) (Linked data using RDA vocabularies)
 - [Examples](#) (Single resource)
 - [R-Balls](#) (Multiple resources)
 - [Datasets](#) (Multiple resources)
- [Tools](#)
 - [Maps](#) (RDF maps between RDA vocabularies and other namespaces)
 - [Alignments](#) (Alignment tables for RDA vocabularies and other namespaces)
 - [Profiles](#) (Application profiles using RDA vocabularies)
 - [RIMMF](#) (RDA data editor)

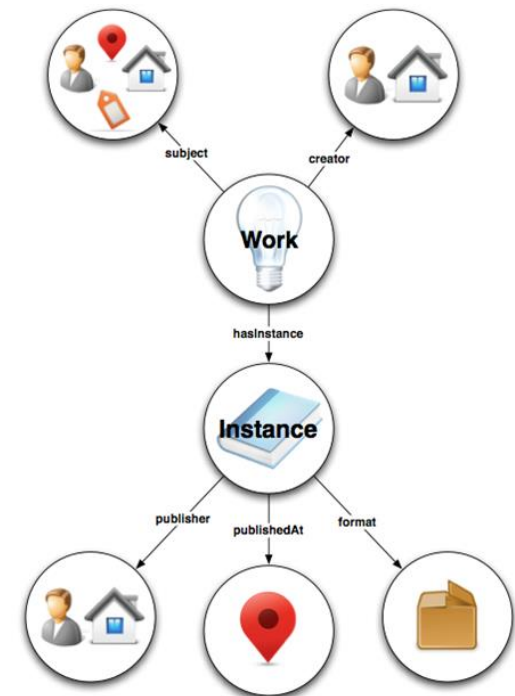
BIBFRAME

Bibliographic Framework Initiative

Being developed as a replacement for MARC 21

Still in early stages

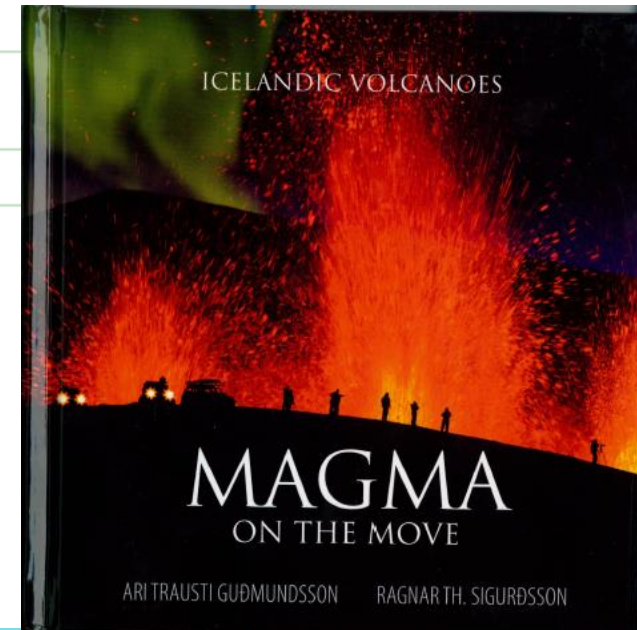
Does not explicitly support FRBR



RIMMF: RDA in Many Metadata Formats

Tool for visualisation and experimentation

Relationship	Heading
Work	Ari Trausti Guðmundsson. Magma on the move
Expression of work	Ari Trausti Guðmundsson. Magma on the move. 2013. English
Manifestation of expression	Magma on the move. Uppheimer. 2013. Volume
Exemplar of manifestation	20150318 Metadata Standards Bookshelf
Author	Ari Trausti Guðmundsson
Photographer	Ragnar Th. Sigurðsson



Links: IFLA

Statement of international cataloguing principles

<http://www.ifla.org/publications/statement-of-international-cataloguing-principles>

FRBR

<http://www.ifla.org/publications/functional-requirements-for-bibliographic-records>

FRAD

<http://www.ifla.org/publications/functional-requirements-for-authority-data>

ISBD

<http://www.ifla.org/publications/international-standard-bibliographic-description>

Links: RDA

Joint Steering Committee for Development of RDA

<http://rda-jsc.org/>

RDA Toolkit

<http://www.rdatoolkit.org/> (website)

<http://access.rdatoolkit.org/> (toolkit)

RDA Registry

<http://www.rdaregistry.info/>

RIMMF

<http://www.marcofquality.com/wiki/rimmf3/doku.php/doku.php?id=rimmf>

Links: linked data

Resource Description Framework (RDF)

<http://www.w3.org/RDF/>

Bibliographic Framework (BIBFRAME)

<http://bibframe.org/> (official site)

<http://www.loc.gov/bibframe/> (background)

Links: other

RDA in MARC

<http://www.loc.gov/marc/RDAinMARC.html>