

# The New RDA Toolkit: How Did We Get Here, and What Do We Do Next?



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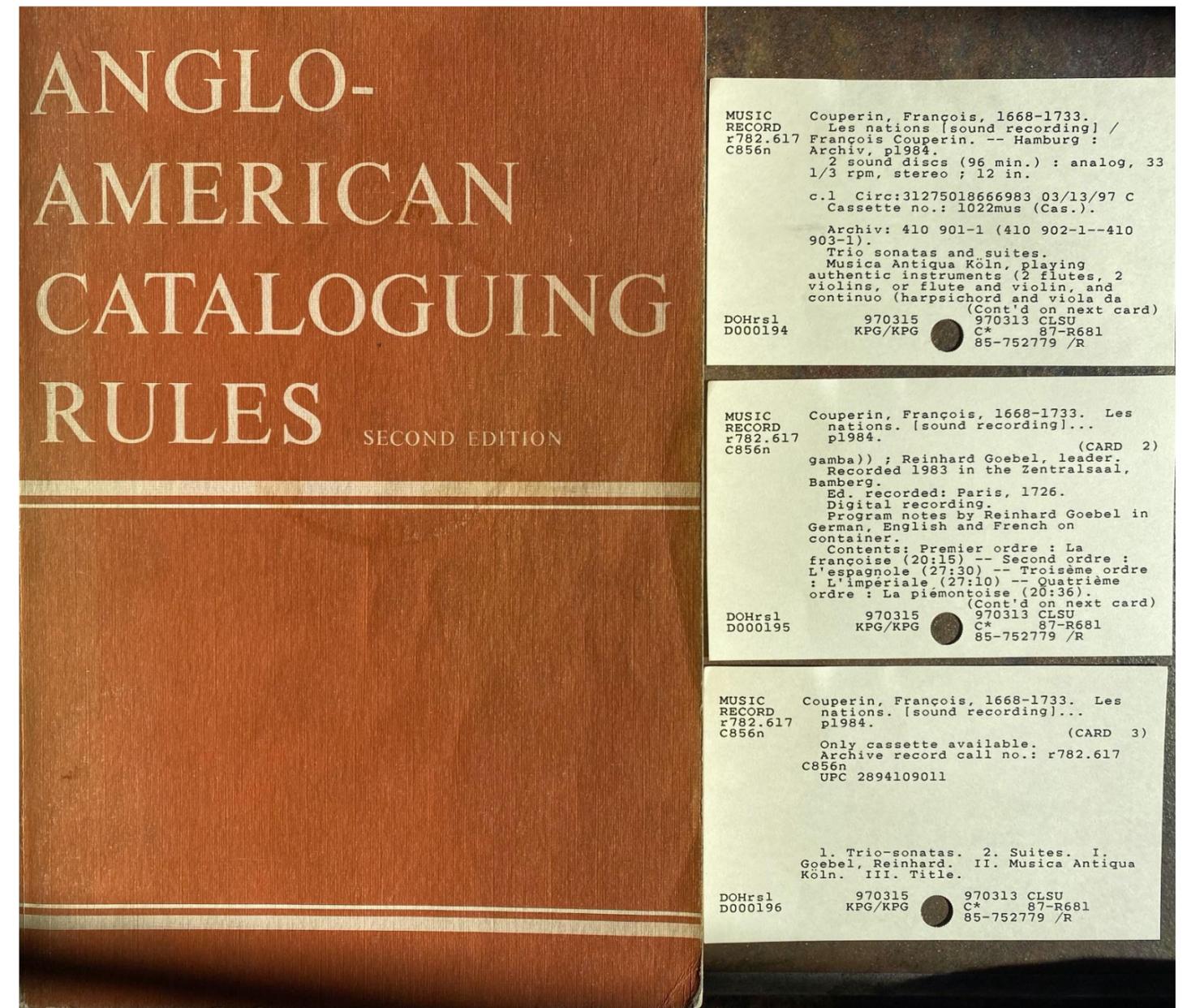
R | D | A  
Resource Description & Access

# AACR2 – A Cataloging Manual

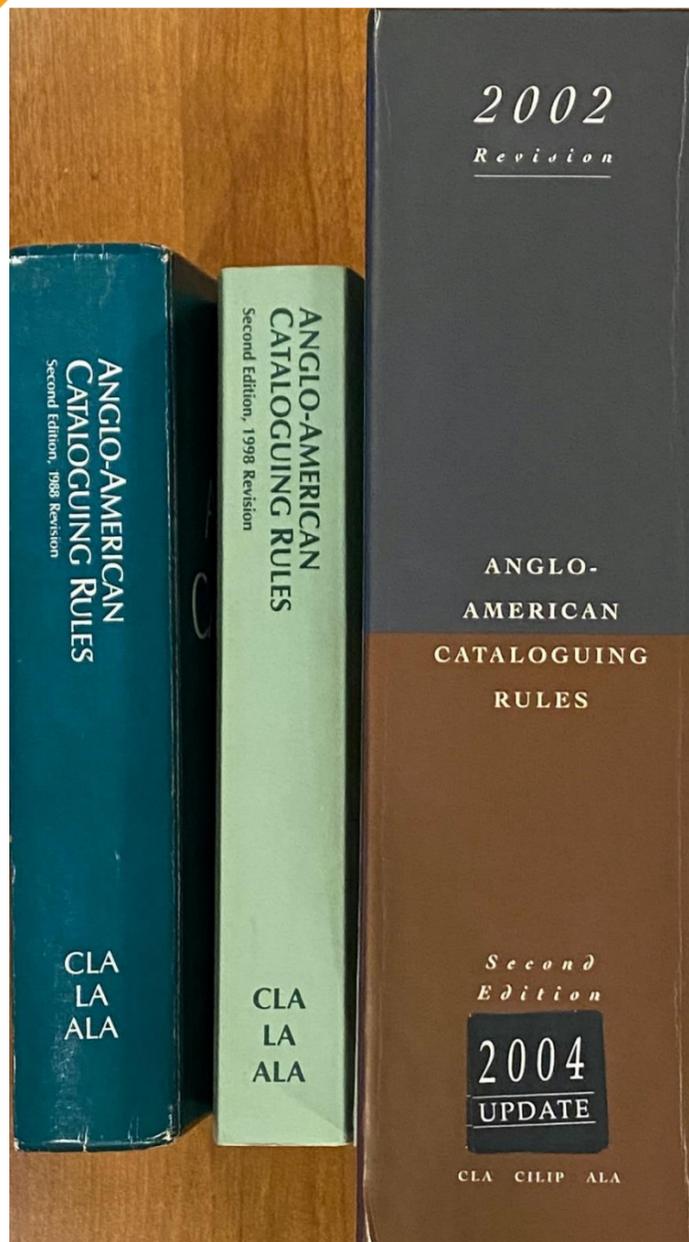
- Designed for a predictable and controlled publishing environment
  - Libraries primarily collected print resources, produced in multiple copies
  - Separate chapters for description by format
    - Distinction met specific needs, especially for non-print, but also introduced variations in practice (source of title, imprint, etc.)
  - Included concepts of universal bibliographic control
- Interpretation/guidance for catalogers
  - LC Rule Interpretations, Music Cataloging Decisions

# AACR2 – Original Edition

- Published 1978
- Implemented by most in US in 1981
- Designed for card catalogs
  - With MARC cataloging waiting in the wings
- Controversial
  - Integrated ISBD for all formats
  - Substantial change in form of name for corporate bodies
- Overthrow of the old bibliographic order?



# AACR2 – Later Editions



- Content added/changed to reflect the changing nature of publications
  - Machine-readable data files --> Electronic resources
  - Serials --> Continuing resources
- A print product
  - New editions published when substantive updates accumulated (1988, 1998, 2002)
  - First issued exclusively as loose-leaf in 2002
  - Integrated into Cataloger's Desktop in 2004
- Need for major revision recognized in 1997:
  - International Conference on the Principles and Future Development of AACR

# RDA (Original)

- Designed to accommodate both “traditional” publications and resources coming out of the Internet age
  - Tangible and intangible carriers, self-published resources, etc.
  - Blending of formats
    - Serially issued map on CD-ROM
- More reliance on “cataloger’s judgment”
- Interpretation/guidance for catalogers
  - LC-PCC Policy Statements, MLA Best Practices

# RDA (Original)

- Published 2010, implemented by many in 2013
- Built on IFLA Functional Requirements Models to date
  - Organized by FR entities – in a linear fashion
- Eliminated descriptive differences based on format
  - Source of title instructions consistently applied
- Designed as a web resource, but with print available
  - Major updates annually



# RDA (Original)

- Primarily implemented in MARC 21
  - For use in web-based catalogs
- Controversial
  - Not tied to ISBD
  - Unnecessarily abandoned established cataloging practices, *or*
  - Too rooted in the past?

<b>title</b>	Dizzy fingers.
<b>published</b>	San Francisco, California : Pair O Dactyl Records, [between 1990 and 1994?]
<b>description</b>	1 audio disc ; 4 3/4 in.
<b>sound</b>	digital, optical
<b>file information</b>	audio file, CD audio
<b>all locations</b>	<a href="#">Availability</a>
<b>location</b>	UMCP Performing Arts Library ⓘ Paged Collections Room: ask at the circulation desk   MCD 14805 <a href="#">Holdings</a> <a href="#">Availability</a>
<b>issue no.</b>	Pair O Dactyl Records: PDR0176CD
<b>notes</b>	Title from disc label.  Principally popular music arranged for piano duo and orchestra; the Confrey works arranged for piano duo and percussion.  Arranged by Norman Landsberg and Robert Blue Yount.
<b>notes</b>	Landsberg & Yount, piano duo ; featuring Gaylord Birch, drums, Jeff Neighbor, bass, with San Francisco Festival Pops Orchestra (1st-2nd, 4th-6th, 8th-9th, 11th works).

...

Full record (from 2012) at <https://catalog.umd.edu/docno=004165193>

# The 3R Project

- RDA Restructure and Redesign Project
  - Launched in 2016
    - Underlying model had changed from Functional Requirements Models to IFLA Library Reference Model (LRM)
  - Original Toolkit content “frozen” in 2017
  - Opportunity to make substantive improvements/changes

# 3R Project Goals

- Implement LRM, including new entities
- Generalize the instructions
  - Retain original RDA elements unless they conflict with LRM, even if redundant
- Offer more flexibility in choosing how to record a piece of information
- Develop a new approach to relationship designators
- Better position RDA for use in linked data applications

# 3R Project Goals

- Promote even greater international adoption of RDA
  - Original Toolkit available in 8 languages
  - RDA vocabularies (in whole or in part) available in over 20 languages now
- Improve the Toolkit interface and address long-standing problems
  - Meet WCAG 2.0 accessibility standards
- Restructure the underlying data
  - Provide efficient and reliable work processes and tools for RDA editors and translators

# RDA (Official - or Post 3R)

- Published at the end of 2020; implementation timeline determined by the various cataloging communities
- Designed for an unpredictable and evolving publishing environment and changing user expectations
  - Connecting users to resources anytime, anywhere
- Positioned to expand for use in archives and museums
- Able to be used in any RDF linked data application
  - Can accommodate ingest of large metadata description sets from external sources and still parse them as RDA compatible
- Uses an “open world” assumption
  - Metadata statements can be used/reused anywhere

# RDA (Official - or Post 3R)

- Controversial
  - Huge expansion of elements
    - No preference/hierarchy/order imposed
  - Generalized instructions support international adoption
    - But communities need to develop more supporting documentation to meet their specific needs
    - Migration of Anglo-American specific instructions to the Community Resources tab
  - Element names, definitions, and even instructions are not written in cataloging manual style prose
  - Can we still share our RDA-based data across communities?

# RDA (Official - or Post 3R)

- Operating in a new (and still changing) world
  - Crafting original cataloging records using RDA won't be the only way bibliographic data is created and shared
  - Substantive changes possible with each release, normally quarterly
  - Taking advantage of a linked data environment requires breaking out of our library-siloed mindsets, including
    - Reliance on strings vs. things
    - Holding on to the concept of “records”
    - Deleting vs. deprecating information

# Approaching Official RDA

ENTITIES

GUIDANCE

POLICIES

RESOURCES

## Elements

All  Attribute Elements  Relationship Elements ▼

Find Element

[category of nomen](#) →

[context of use](#) →

[intended audience of nomen](#) →

[language of nomen](#) →

[nomen string](#) →

[note on nomen](#) →

[related entity of nomen](#) →

[scheme of nomen](#) →

[script of nomen](#) →

[status of identification](#) →

[undifferentiated name indicator](#) →

- Get to know *Entities*
  - From LRM
  - Did not implement “Res”
    - “RDA entity” is the top term instead
  - Kept refinements of the new “Collective Agent”: “Corporate Body” and “Family”
- Ability to search or browse by attribute or relationship elements at end of entity pages

# Approaching Official RDA

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## summarization of content

👁 Element Reference

### IRI

<http://rdaregistry.info/Elements/e/P20069>

### Domain

Expression →

### Alternate labels

has summarization of content

### + IFLA LRM

### + Dublin Core Terms

### - MARC 21 Bibliographic

MARC 21 Bibliographic 520 \*\* \$a, b [unstructured description]

- Get to know *Elements*

- Navigate from Entities, or search directly
- Distinction between attribute and relationship elements
- Element Reference
  - Anything with a “range” is a relationship element, otherwise it’s an attribute
  - Includes mappings to other standards
    - LRM, Dublin Core, MARC 21
  - Includes alternate labels
- Consistent page layout

# Approaching Official RDA

ENTITIES

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## Guidance Chapters

- Introduction
  - Aggregates
  - Application profiles
  - Content and carrier
  - Data provenance
  - Diachronic works
  - Entity boundaries
  - Fictitious and non-human appellations
  - Manifestation statements
  - Nomens and appellations
  - RDA implementation scenarios
  - Recording methods
  - Representative expressions
  - Resource description
  - Terminology
  - Transcription guidelines
  - User tasks
  - Well-formed RDA
- Get to know **Guidance**
    - Chapters explain many concepts
      - Many of the concepts aren't as new as they may seem
      - Some have sub-sections
    - Frequently referred to from specific instructions:

For general guidance on identifiers, see [Guidance: Recording methods](#). [Recording an identifier](#) →

# Approaching Official RDA

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- Get to know **Policies**

- Right now, where to find **DRAFT** collected policy statements from the British Library and from LC-PCC
- MLA Best Practices will go here too
- Separate sections for
  - RDA Entities and Elements
  - RDA Guidance
- Need some context
  - Links in display give option box OR navigation assistance to the element page

Entity boundary

**Condition Option** →

LC/PCC practice: Cataloger's judgment.

Person

Record a new instance of **Person**.

**CONDITION**

There is a significant difference in a value of Person: **field of activity of person** →.

**OPTION**

Record a new instance of **Person** →.

R | D | A  
Resource Description & Access

# Approaching Official RDA

ENTITIES

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RESOURCES

- Get to know ***Resources***
  - Want to find RDA vocabularies?
    - See Vocabulary Encoding Schemes
  - Want to know the latest changes?
    - See Revision History
  - Want to consult AACR2?
    - It's here, basically as a searchable PDF
      - Less functionality than in Original Toolkit
    - You may need to log in with your institutional account

Glossary

Vocabulary Encoding Schemes

Community resources

Revision History

Original Toolkit

AACR2

# Wait, Community Resources?

- New with the September 2020 release
  - Under active development by the RSC
  - Structure and content may change as development continues
- Relocated community-specific instructions from “base RDA”
  - Still available for use in the Toolkit
  - Includes reworking of Appendices for Capitalization, Abbreviations, Initial Articles, and Titles of Nobility
  - Control of content and development up to user communities
    - like MLA

# RSC Development Priorities

- More details in [RSC Action Plan, 2021-2023](#)
  - Work on governance issues relating to Community Resources
  - Resolve pseudo-element issues
  - Work on the following, by forming separate working groups
    - Extent, Place/jurisdiction, Religious content, Names of corporate bodies in more than one language
  - BIBFRAME mapping
  - Act on proposals arising from communities

# More Information

- RDA Steering Committee website: <http://www.rda-rsc.org/>
  - Including pages for Presentations (by year) and Documents (by year)
- Official RDA: <https://access.rdatoolkit.org/>
- RDA Toolkit website: <https://www.rdatoolkit.org>
- RDA YouTube channel:  
<https://www.youtube.com/c/RDAToolkitVideo>
  - [January 2021 RDA Toolkit Demo](#)
  - [RDA Concept series](#) short videos

Questions?  
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