Getting Ready to Use the New RDA

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Today’s Topics

• Orientation
  ▪ Definitions
  ▪ Brief overview
    ○ Differences between the original and official RDA Toolkits

• Supplemental information

• Steps to take in cataloging a book
  ▪ Abbreviated example

• Q & A
Base RDA

• A package of data elements, guidelines, and instructions for creating library and cultural heritage metadata that are well-formed according to international models
• Relevant to all RDA users worldwide
• Includes
  ▪ Guidance chapters
  ▪ Instructions: Entities & Elements
  ▪ Glossary
  ▪ RDA Vocabulary Encoding Schemes
RDA Toolkit

• An integrated, browser-based, online product that allows users to interact with a collection of cataloging-related documents and resources, including
  ▪ RDA guidelines and instructions (e.g., base RDA)
  ▪ Policy statements
  ▪ User documents
  ▪ Etc.

• Official RDA Toolkit: the current version, available at https://access.rdatoolkit.org

Brief Overview
Welcome back, Kathy

Element: title of manifestation
2021/11/04 10:02:41 EST

Element: carrier type
2021/11/03 05:48:51 EST

Element: media type
2021/11/03 05:47:41 EST

Element: content type
2021/11/03 05:46:31 EST

Sign Up for Free RDA Toolkit Demos in French and Spanish

In December 2021 and January 2022, the American Library Association will offer free RDA Toolkit demos in the French and Spanish languages respectively.

Read more

Latest News on the RDA Toolkit Server Migration
RDA Toolkit Navigation

• Profile features are in the dark blue bar
• Content tabs in the lighter blue bar; use drop-down menus
• Major differences from the original Toolkit
  ▪ No table of contents
  ▪ Ability to view a selected policy statement set in context with the instructions
  ▪ Guidance chapters separate from instructions
    o Cover background information, new concepts, and even some instructions that apply to more than one element
Stylistic Differences – Layout

• Flat structure
  ▪ No default organization by entity
    o Such as original Toolkit Chapter 2, Identifying Manifestations and Items
    o Instead: Separate element pages – for over 3000 elements
  ▪ Instruction numbers removed
    o These conveyed hierarchies and were difficult to maintain
    o Instead: Obtain references to specific parts of instructions when highlighting text
      • Links
      • Citation numbers

• More flexible for an international audience
  ▪ Or other specialized communities
Stylistic Differences – More Specificity

• Separate elements for agent, collective agent, corporate body, family, person
  ▪ architect agent
  ▪ architect collective agent
  ▪ architect corporate body
  ▪ architect family
  ▪ architect person

• Two kinds of transcription guidelines
  ▪ Basic transcription
  ▪ Normalized transcription
Stylistic Differences – Instructions

• Some rewording
  ▪ More machine-predictable; also easier for translators
  ▪ More compatible with linked data applications
  ▪ Generalized instructions where possible
    o Helps in goal to remove Anglo-American focus
  ▪ Greater consistency across the Toolkit – a long-standing interest
    o Anyone remember the 2002-2007 CC:DA Task Force on Consistency across Part I of AACR2?

• New and/or different terminology deriving from data model
  ▪ Nomen, Timespan (new entities from IFLA Library Reference Model)
  ▪ Element subtype (AKA narrower element)
  ▪ Entity supertype (AKA broader entity)
Stylistic Differences – Condition/Option Boxes

• Replace complex if/then construction in the original Toolkit
  ▪ As well as optional additions, optional omissions, and exceptions

• Choices now presented more like a decision tree

• Policy statements may be associated with these, to provide community guidance

• Note: Option boxes may exist without related condition boxes
Old vs. New Approach

Original Toolkit
2.4.1.8 Noun phrases occurring with a statement of responsibility

*If:*

the sequence, layout, or typography on the source of information indicates that a noun or noun phrase is intended to be part of a statement of responsibility

*and*

the noun phrase is indicative of the role of the agent named in a statement of responsibility

*then:*

treat the noun or noun phrase as part of a statement of responsibility.

Official Toolkit
Statement of Responsibility (88.22.88.92)

Noun phrases occurring with a statement of responsibility

**CONDITION**

The sequence, layout, or typography on the source of information indicates that a noun or noun phrase is intended to be part of a statement of responsibility.

The noun phrase is indicative of the role of the agent named in a statement of responsibility.

**OPTION**

Treat the noun or noun phrase as part of a statement of responsibility.
Elements

• Have a unique name and identifier
  ▪ Element name does not have to be label you show to your users

• Can only describe one entity

• Two types
  ▪ Attribute element
    o Characteristic of the entity; no relationship to other entities
      • Under *person*: *profession or occupation*: A vocation or avocation
  ▪ Relationship element
    o Relates two RDA entities (e.g., *person* and *timespan*)
      • *date of birth*: A timespan during which a person was born
    o Paired with an inverse element
      • *date of birth of*: A person who was born during a timespan
Structure of Element Pages

• Name of element
• Definition and scope
  ▪ Element reference
• Prerecording
  ▪ Is this element appropriate for my resource?
• Recording
  ▪ Includes sections for each of the four recording methods
• Related elements, as applicable
  ▪ Broader
  ▪ Narrower
  ▪ Inverse
Example: *history of work*

**Definition and Scope**
A summary of information about the history of a work.

**Prerecording**

**Recording**

**Recording an unstructured description**

OPTION

Incorporate information associated with the following elements:

- Work: *date of work*
- Work: *category of work*
- Work: *place of origin of work*
- Work: *variant title of work*

For general guidance on unstructured descriptions, see Guidance: Recording methods. 

**LC-PCC**

LC/PCC practice: Cataloger's judgment.
Example: *history of work*

**Recording a structured description**
This recording method is not applicable to this element.

**Recording an identifier**
This recording method is not applicable to this element.

**Recording an IRI**
This recording method is not applicable to this element.

**View in Context Example**

**Related Elements**
None
**Example: Element Reference**

**Entities > Work > history of work**

**history of work**

**Definition and Scope**

A summary of information about the history of a work.

- **Element Reference**
  - **IRI**
    - http://rdaregistry.info/Elements/w/P10210
  - **Domain**
    - Work
  - **Alternate labels**
    - has history of work
  - **IFLA LRM**
    - http://iflastandards.info/ns/lrm/lrmer/E1A2
  - **MARC 21 Authority**
    - MARC 21 Authority 665 **$a** [unstructured description]
  - **MARC 21 Bibliographic**
    - MARC 21 Bibliographic 500 **$a** [unstructured description]

- **Link to unique IRI in RDA Registry**
- **What entity the element describes** (Relationship elements also have a range)
- **Verbalized label**
- **Link to supporting LRM element set** (in this case E1A2, “has note”)
- **Mappings to MARC 21**

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The element *place of birth* relates a to a that is

**Definition and Scope**
A place where a person is born.

**Element Reference**

**IRI**
http://rdaregistry.info/elements/a/P50119

**Domain**
Person

**Range**
Place

**Alternate labels**
has place of birth
+ IFLA LRM
+ MARC 21 Authority
Entities and their Elements

- Go to a specific entity page
- Scroll to the bottom, to the “elements” section
- Options
  - View all
  - View only attribute elements
  - View only relationship elements
    - Can specify another entity (like work)
- Can search any of these lists in “Find Element” box

Example from “Person” (61.08.12.74)

**elements**

- All
- Attribute Elements
- Relationship Elements

Find Element

- address of person
- biographical information
- category of person
- field of activity of person
- gender
- language of person
- note on person
- profession or occupation
- related entity of person
- term of rank, honour, or office
Other Ways to Find Elements

• Use the search box

• Find element in the Glossary, and click on the name

  **copyright date**
  A timespan associated with a claim of protection under copyright or a similar regime.
  A copyright date includes a phonogram date associated with a claim of protection for an audio recording.
  *Inverse:* **copyright date of**

• Click on links in an element page, entity page, or guidance chapter

A name may be categorized as:

- Person: *preferred name of person* →
- Person: *variant name of person* →

(example from 06.15.43.81)
Toolkit Orientation Resources

• On the RDA Toolkit YouTube channel, watch
  ▪ Toolkit demo, July 2021: https://www.youtube.com/watch?v=azoBV9GOv-4
    o Future demos will be announced at https://www.rdatoolkit.org
  ▪ RDA Concepts playlist: https://www.youtube.com/c/RDAToolkitVideo/playlists

• Consult the RSC website for relevant presentations, including:
  ▪ The New Normal of RDA: An overview of Structure and Concepts
    (Kate James, May 2021)
  ▪ RDA Updates (Kathy Glennan, March 2021)
  ▪ A Quickstart Guide to RDA Terminology: Elements, SES, and VES
    (Dominique Bourassa, January 2020)

• Explore on your own: https://access.rdatoolkit.org
  ▪ If you’re a subscriber to RDA Toolkit, you have access
Supplemental Information

Documentation, Tools, etc.
Community Guidance

• In RDA Toolkit
  ▪ Policy statements
    o Application decisions for a given cataloging agency or community
  ▪ Community resources
    o Community-specific guidance not in the above
  ▪ Documents
    o User-created documentation
    o Can be used privately or shared locally or globally

• Outside RDA Toolkit
  ▪ Application profile
    o Specifies the selection of entities, elements, etc. that are appropriate to a specific application of RDA metadata
    o One or more may ultimately be integrated into RDA Toolkit
  ▪ LC/PCC Metadata Guidance documents
Current Policy Statements

• From three organizations
  ▪ British Library
  ▪ Library of Congress/Program for Cooperative Cataloging
  ▪ Music Library Association

• In draft form, incomplete

• User configuration option to display these in context with the related instructions

• May also access through the policies tab
Application Profile – Definition

• Which data elements to record for an entity
  ▪ Use vs. do not use
  ▪ Level of granularity

• Which elements are mandatory vs. optional

• Which elements are repeatable

• Which vocabulary encoding scheme (VES) to use for an element, if applicable

• Which string encoding scheme (SES) to use for an element, if applicable

• Which recording method(s) to use

• Which optional instructions to apply

• Which policy statements to apply
Application Profile – Function

• Similar to familiar MARC 21 functionality
  ▪ Input workforms
    o Which elements are prompted, how they are grouped, what display labels are used
    o Lookup tables for elements with vocabulary encoding schemes
    o Links to applicable instructions
  ▪ Data validation / quality assurance
    o Does the metadata meet the repeatability requirements, etc.?
  ▪ Data export specifications
    o What metadata from a larger set should be extracted for use in a given application?
Community Resources
(Under Construction!)

• First appeared in April 2021 release
  ▪ Initial content the result of
    o Internationalization needs
    o Commitment to keep currently used instructions within the Toolkit
  ▪ May have associated policy statements
  ▪ Need to be owned by a given community

• Future use, format, content, etc. under discussion
Community Resources
(Under Construction!)

• Community refinements
  ▪ Legacy Anglo-American instructions, specific to this community’s use
    o Various instructions for creating access points for work, expression, manifestation, person, family, corporate body, and place
    o Selection of preferred titles and creation of access points for legal works, musical works, religious works, and official communications
    o Instructions for how to construct publication, distribution, manufacture, and production statements, as well as edition statements and series statements

• Community vocabularies
  ▪ Controlled terms not part of RDA, but useful to a given community
    o Books of the Bible in English, in French, in German, etc.
    o Abbreviations
    o Terms in specific languages
User-Created Documents

• Created by individual users within the Toolkit
  ▪ Using a simple HTML editor

• 6 categories
  ▪ Application profile
  ▪ Local policy [not the same as Policies!]
  ▪ Map
  ▪ Quick reference
  ▪ Training material
  ▪ Workflow
Steps to Take in Cataloging a Book
Decide Where to Begin

• Select your encoding scheme
  ▪ Such as MARC 21 or BIBFRAME

• Be aware of supporting/supplemental documentation
  ▪ Application profile
  ▪ Policy Statements
  ▪ Transcription guidelines
  ▪ Check to see if you have local documentation in the Toolkit

• Pick an entity to start with
  ▪ Manifestation, Person, etc.

• Start capturing data
Cataloging Example

Disclaimers

• Application profiles, policy statements, and community best practices are under development and not yet finalized
  ▪ These will be specific to a given community’s needs

• It is not possible to give a true demonstration of “how to catalog a book” until all these pieces are in place

• Thus, the following example
  ▪ Contains assumptions about application profile requirements, with a focus on retaining current North American practices where possible
  ▪ Centers on the Manifestation entity, and only includes basic elements
  ▪ Does not include quotations or screen shots from the Toolkit
### Sample Application Profile

<table>
<thead>
<tr>
<th>Element name</th>
<th>Required</th>
<th>Repeatable</th>
<th>Recording Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media type</td>
<td>Yes</td>
<td>Yes</td>
<td>Structured</td>
</tr>
<tr>
<td>Mode of issuance</td>
<td>Yes</td>
<td>No</td>
<td>Structured</td>
</tr>
<tr>
<td>Title proper</td>
<td>Yes</td>
<td>No</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Parallel title proper</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Other title information</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Statement of responsibility relating to title proper</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Variant title of manifestation</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Designation of edition</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Designation of named revision of edition</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
</tbody>
</table>
## Sample Application Profile

<table>
<thead>
<tr>
<th>Element name</th>
<th>Required</th>
<th>Repeatable</th>
<th>Recording Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement of responsibility relating to edition</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Statement of responsibility relating to named revision of edition</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Place of publication</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Name of publisher</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Date of publication</td>
<td>Yes, if applicable</td>
<td>No</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Copyright date</td>
<td>No</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Carrier type</td>
<td>Yes</td>
<td>Yes</td>
<td>Structured</td>
</tr>
<tr>
<td>Extent of manifestation</td>
<td>Yes</td>
<td>Yes</td>
<td>Structured</td>
</tr>
<tr>
<td>Dimensions</td>
<td>Yes</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
</tbody>
</table>
## Sample Application Profile

### Manifestation Elements (p. 3)

<table>
<thead>
<tr>
<th>Element name</th>
<th>Required</th>
<th>Repeatable</th>
<th>Recording Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title of series</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Parallel title of series</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Other title information of series</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Statement of responsibility relating to series</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Numbering within sequence</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Note on manifestation</td>
<td>No</td>
<td>Yes</td>
<td>Unstructured</td>
</tr>
<tr>
<td>Identifier for manifestation</td>
<td>Yes, if applicable</td>
<td>Yes</td>
<td>Identifier</td>
</tr>
</tbody>
</table>
INTRODUCING RDA

A Guide to the Basics after 3R

Second Edition

CHRIS OLIVER
Manifestation Information

- **title of manifestation**
  - Any relevant element subtypes (or narrower elements)?
    - title proper
    - parallel title proper
    - variant title of manifestation
    - abbreviated title
    - title of series
    - parallel title of series

- **other title information**
Manifestation Information

• **edition statement**
  - Any relevant sub-elements (or components of what will be put into a complete edition statement)?
    - designation of edition
    - designation of named revision of edition
    - statement of responsibility relating to edition
    - statement of responsibility relating to named revision of edition
Manifestation Information

• **statement of responsibility**
  - Any relevant element subtypes?
    - **statement of responsibility relating to title proper**
    - parallel statement of responsibility relating to title proper
    - statement of responsibility relating to edition
    - parallel statement of responsibility relating to edition
    - statement of responsibility relating to named revision of edition
    - parallel statement of responsibility relating to named revision of edition
    - statement of responsibility relating to series
    - parallel statement of responsibility relating to series
Manifestation Information

- *publication statement*
  - Any relevant sub-elements?
    - date of publication
    - name of publisher
    - place of publication
Title proper

• Record as an unstructured description
  ▪ Only choice
  ▪ See if any of the specific conditions apply

• Some additional guidance in title of manifestation
  ▪ Transcription choices
  ▪ Source of information: any
  ▪ See if any of the specific conditions apply

Result – with normalized transcription

<table>
<thead>
<tr>
<th>Title proper</th>
<th>Introducing RDA</th>
</tr>
</thead>
</table>

 Getting Ready to Use the New RDA
Other title information

• Record an unstructured description
  ▪ Only choice
  ▪ Apply your chosen transcription guidelines
  ▪ Source of information: usually the same as the title proper

• Check for policy statement guidance
  ▪ LC/PCC: Core for monographs

Result – with normalized transcription + local guidance to not capitalize the first word in this element

| other title information | a guide to the basics after 3R |
Statement of responsibility relating to title proper

• Record as an unstructured description
  ▪ Only choice
  ▪ Source of information: same as the title proper (implied by name of element)
  ▪ See if either of the specific conditions apply
    o Two or more values for the element
    o Element in a parallel language or script

• Some additional guidance in Statement of responsibility
  ▪ Transcription choices
  ▪ See if any of the specific conditions apply

Result – with normalized transcription

<table>
<thead>
<tr>
<th>statement of responsibility relating to title proper</th>
<th>Chris Oliver</th>
</tr>
</thead>
</table>

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Designation of edition

- Record an unstructured description
  - Only choice
  - Apply your chosen transcription guidelines
  - Source of information: any
  - See if any of the specific conditions apply

Result – with normalized transcription

designation of edition
Second edition
Place of publication

- Recording methods include
  - Unstructured
  - Structured (e.g., access point)
- Application profile says to use unstructured description
  - Apply your chosen transcription guidelines
  - Source of information: manifestation
  - See if any of the specific conditions apply

Result – with normalized transcription

| place of publication | Chicago |
Name of publisher

• Recording methods include
  ▪ Unstructured
  ▪ Identifier
  ▪ IRI

• Application profile says to use unstructured description
  ▪ Apply your chosen transcription guidelines
  ▪ Source of information: any
  ▪ See if any of the specific conditions apply

Result – with normalized transcription

<table>
<thead>
<tr>
<th>name of publisher</th>
<th>ALA Editions</th>
</tr>
</thead>
</table>

Recording methods include

- Unstructured
- Identifier
- IRI
Date of publication

- All recording methods available
- Application profile says to use unstructured description
  - Apply your chosen transcription guidelines
  - Source of information: manifestation (preferred)
    - Condition/option boxes for when the date cannot be found in the manifestation
  - See if any of the specific conditions apply

Result – with normalized transcription

| date of publication | 2021 |

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Title of series

• Recording methods include
  ▪ Unstructured
  ▪ Identifier
  ▪ IRI

• Application profile says to use unstructured description
  ▪ See if any of the specific conditions apply

• Some additional guidance in *title of manifestation*
  ▪ Transcription choices
  ▪ Source of information: any
  ▪ See if any of the specific conditions apply

Result – with normalized transcription

| *title of series* | ALA Editions special reports |
Extent, etc.

- Instructions largely unchanged from original RDA
- Consult the following elements
  - extent of manifestation
  - dimensions
  - colour content
    - If describing color in illustrations, use illustrative content instead
- If you have the following, you’re cataloging an aggregate, and additional instructions apply
  - illustrative content
  - supplementary content

extent of manifestation
- Create a structured description
  - Record a number of units and a term for each kind of unit
  - Option (apply per LC/PCC)
    - Specify the number of subunits if the online resource parallels a print counterpart

illustrative content
- Option to record “illustrations”
  - LC/PCC: cataloger’s judgment

xi, 200 pages

1 online resource
# Putting It All Together

## By Element

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>title proper</td>
<td>Introducing RDA</td>
</tr>
<tr>
<td>other title information</td>
<td>a guide to the basics after 3R</td>
</tr>
<tr>
<td>statement of responsibility relating to title proper</td>
<td>Chris Oliver</td>
</tr>
<tr>
<td>designation of edition</td>
<td>Second edition</td>
</tr>
<tr>
<td>place of publication</td>
<td>Chicago</td>
</tr>
<tr>
<td>name of publisher</td>
<td>ALA Editions</td>
</tr>
<tr>
<td>date of publication</td>
<td>2021</td>
</tr>
<tr>
<td>title of series</td>
<td>ALA Editions special reports</td>
</tr>
<tr>
<td>extent of manifestation</td>
<td>1 online resource (xi, 200 pages)</td>
</tr>
<tr>
<td>illustrative content</td>
<td>illustrations</td>
</tr>
</tbody>
</table>

## In MARC 21 Bibliographic Format

<table>
<thead>
<tr>
<th>Tag</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td>Introducing RDA : ‡b a guide to the basics after 3R / ‡c Chris Oliver.</td>
</tr>
<tr>
<td>264</td>
<td>Chicago: ‡b ALA Editions, ‡c 2021.</td>
</tr>
<tr>
<td>300</td>
<td>1 online resource (xi, 200 pages) : ‡b illustrations</td>
</tr>
<tr>
<td>490</td>
<td>ALA Editions special reports</td>
</tr>
</tbody>
</table>
More Information

• RDA Steering Committee website: http://www.rda-rsc.org/
  ▪ Including pages for Presentations (by year) and Documents (by year)
    ○ 2021 Presentations: http://www.rda-rsc.org/node/654
    ○ 2021 Documents: http://www.rda-rsc.org/node/653
  ▪ News and Announcements: http://www.rda-rsc.org/news

• Official RDA: https://access.rdatoolkit.org/

• RDA Toolkit website: https://www.rdatoolkit.org

• RDA YouTube channel [free!]: https://www.youtube.com/c/RDAToolkitVideo
Questions?
Ask now, or email me:
RSCChair@rdatoolkit.org