

The New RDA Toolkit: Everything Has Changed – or Has It?

Kathy Glennan

Head, Original & Special Collections Cataloging, University of Maryland
Chair, RDA Steering Committee

R | D | A
Resource Description & Access

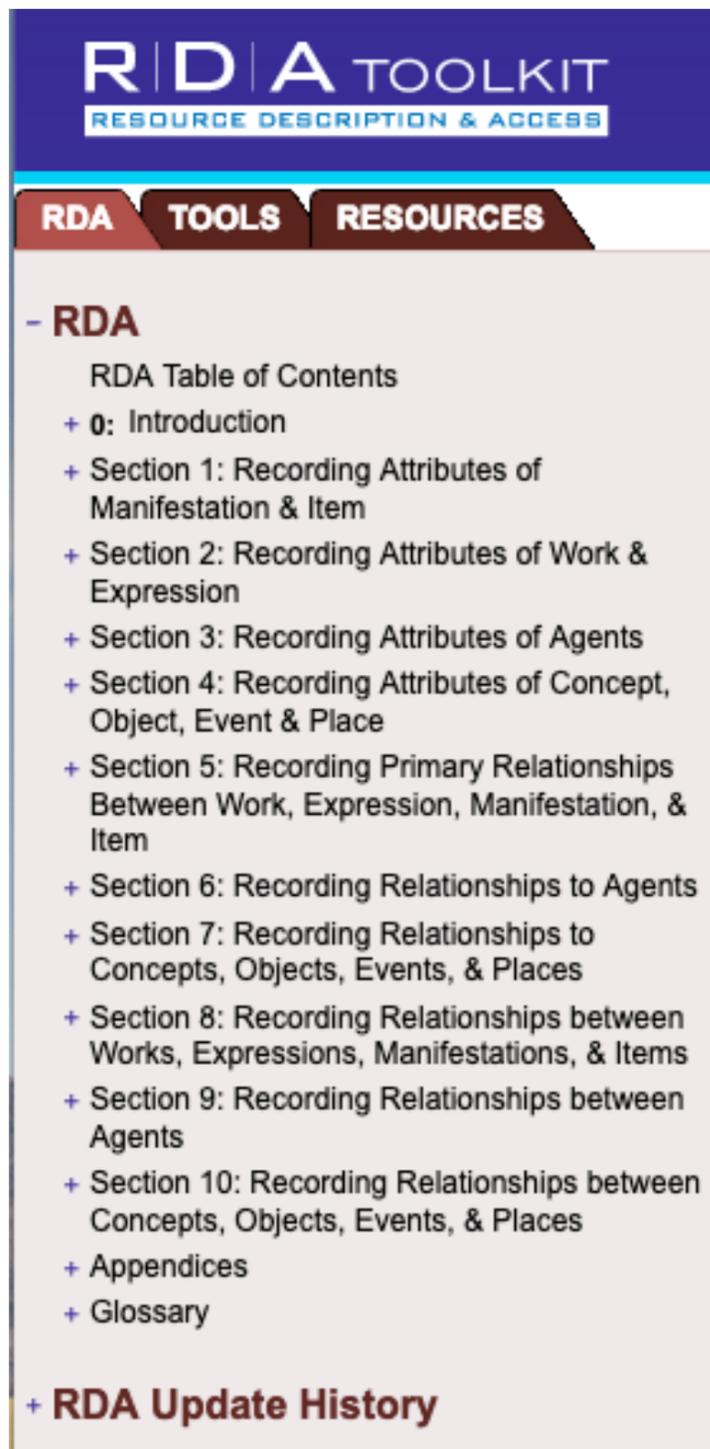
What's Changed?

New Organization

Moving Away from Ebook Format

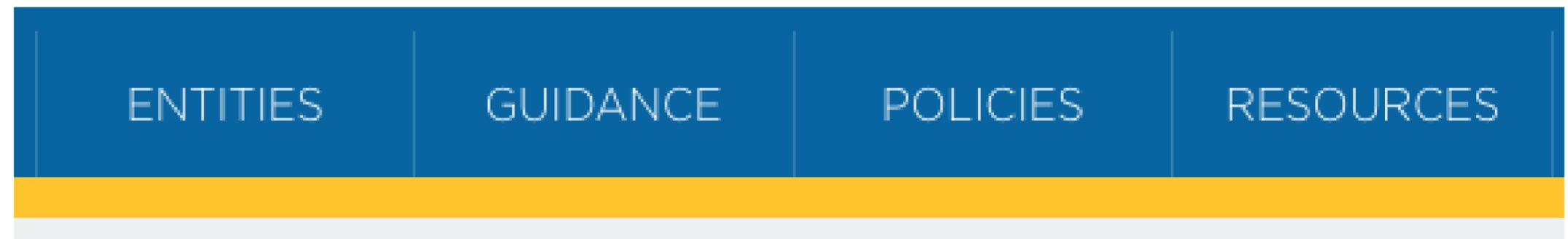
- No set order for approaching instructions
 - More like “choose your own adventure”
- Graphic browser coming in April
 - Will help you know where you are
 - Will allow you to navigate to other elements of interest
- New structure includes tabs for
 - Entities
 - Guidance
 - Policies
 - Resources

Original Toolkit



The screenshot shows the 'Original Toolkit' website. At the top is a dark blue header with the text 'R | D | A TOOLKIT' and 'RESOURCE DESCRIPTION & ACCESS' below it. Below the header are three tabs: 'RDA', 'TOOLS', and 'RESOURCES'. The 'RDA' tab is selected. The main content area is light gray and contains a list of items under the heading '- RDA'. The items are: 'RDA Table of Contents', '+ 0: Introduction', '+ Section 1: Recording Attributes of Manifestation & Item', '+ Section 2: Recording Attributes of Work & Expression', '+ Section 3: Recording Attributes of Agents', '+ Section 4: Recording Attributes of Concept, Object, Event & Place', '+ Section 5: Recording Primary Relationships Between Work, Expression, Manifestation, & Item', '+ Section 6: Recording Relationships to Agents', '+ Section 7: Recording Relationships to Concepts, Objects, Events, & Places', '+ Section 8: Recording Relationships between Works, Expressions, Manifestations, & Items', '+ Section 9: Recording Relationships between Agents', '+ Section 10: Recording Relationships between Concepts, Objects, Events, & Places', '+ Appendices', and '+ Glossary'. At the bottom of the list is '+ RDA Update History'.

Beta Toolkit



The screenshot shows the 'Beta Toolkit' website. It features a dark blue header with four white text boxes: 'ENTITIES', 'GUIDANCE', 'POLICIES', and 'RESOURCES'. Below the header is a yellow horizontal bar.

Entities

- Based on IFLA Library Reference Model (LRM) entities
 - But “RDA Entity” is at top, instead of “Res”:
includes all other declared entities in RDA
- Separate pages for each
- Related elements linked at the bottom of each page

Elements

[access point for timespan](#) → 
[appellation of timespan](#) → 
[authorized access point for timespan](#) → 
[beginning](#) → 

ENTITIES

RDA Entity

Work

Expression

Manifestation

Item

Agent

Person

Collective Agent

Corporate Body

Family

Nomen

Place

Timespan

Elements

- A specific aspect, characteristic, attribute, or relationship used to describe an entity
 - Each has its own page
 - Includes
 - Element super-type: Broader category or type of element
 - *Example:* Capture information
 - Element sub-type: Narrower category or type of element
 - *Example:* Place of capture
 - Super-element: Aggregates data values from one or more element sub-types
 - *Example:* Series statement
 - Sub-element: Component of a larger element that aggregates data values from two or more elements
 - *Example:* Statement of responsibility relating to series

Guidance

- Chapters that provide context, explain concepts, etc.
- Audience varies based on topic
- Experienced catalogers will rarely use
- May be referenced in the element pages
 - For general guidance, see Recording methods: [Recording an unstructured description](#)
 - Transcribe the value using the RDA [Transcription guidelines](#)

GUIDANCE

Introduction to RDA

Aggregates

Application profiles

Content and carrier

Data provenance

Diachronic works

Manifestation statements

Nomens and appellations

Recording methods

Representative expressions

Resource description

Terminology

Transcription guidelines

Policies

POLICIES

BLPS

LCPCC_PS

- Where to find the policy statements for each agency, brought together in one place
 - Currently contains only test data
 - Will expand to accommodate the current 8 policy statements (and others as they are developed)
- These statements will also display in context

- + Anwendungsrichtlinien für den deutschsprachigen Raum (D-A-CH AWR)
- + British Library Policy Statements (BL PS)
- + Kungliga Biblioteket Svensk Praxis (KBSP)
- + Library and Archives Canada Policy Statements (LAC PS)
- + Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS)
- + Music Library Association Best Practices (MLA BP)
- + National Library of Australia Policy Statements (NLA PS)
- + Suomen kirjastojen linjaukset

Recording

CONDITION

A manifestation consists of more than one carrier type.

Policy Statement

Recording

TEST CONTENT - not an actual policy statement

Apply all the following options.

Send to Back

Resources

- Additional information of interest
 - Some new
 - Vocabulary Encoding Schemes
 - Relationship Matrix
 - Some familiar
 - Based on five of the former Appendices
- First two sections officially part of RDA
 - Will be in all translations
- Final section is language- or community-specific
 - This is also where you will find AACR2

RESOURCES

Glossary

Vocabulary Encoding
Schemes

Relationship Matrix

Abbreviations and symbols

Additional instructions on
names of persons

Capitalization

Initial articles

Terms of rank

Books of the Bible

Terms for medium of
performance

New Terminology, Concepts, etc.

Old Concepts, New Terms

- Vocabulary Encoding Scheme
 - Controlled values for elements
 - Some within RDA, under that Resources tab
 - Also includes
 - Codes from an ISO list
 - Authority control system terms, codes, etc.
 - Entries from other standardized lists
- String Encoding Scheme
 - Specification of how to construct a particular string
 - Example: Publication statement
 - Place of publication : Name of publisher, Date of publication

New Concepts

- Representative expression elements
 - Characteristics that
 - “Live” at the Expression level
 - Become identified as Work attributes because they best represent the intention of the creator
 - Original language, medium of performance, key, intended audience, date, duration, etc.
 - For one work, different attributes can come from different expressions
- Diachronic works
 - Issued over time
 - Can be monographs (The complete works of C.P.E. Bach), serials (Denkmäler der Tonkunst in Österreich), or integrating resources (Grove Music Online)
 - Can be aggregates or single works (a serialized novel)

New Concepts

- Manifestation statements
 - Transcribed from the manifestation
 - Recording method = Unstructured description
 - How the resource represents itself
 - Supports machine transcription derived from digitized and born-digital manifestations
 - 13 sub-types, including “manifestation copyright statement”
- Data provenance
 - Where the information came from
 - Encompasses
 - “Sources of information” from the original Toolkit
 - Information from a reference source
 - Who created the record (or the “metadata work”)

New Concepts

- Nomen

- Associates a combination of signs or symbols (an appellation) with an RDA entity
- Identical strings may refer to different entities (Johann Strauss)
- One entity may have many nomen (Cher / Cher Bono / Cherilyn La Piere / Cheryl Sarkisian / etc.)

- Appellation elements

- Includes existing elements (preferred name, title, etc.) & new elements (access point, authorized access point, variant access point)
 - These 96 elements have undergone review for consistency
 - Principles applied to place instructions in the appropriate elements
 - For example: Appellation of person; Name of person; Preferred name of person; Variant name of person; Access point for person; Authorized access point for person; Variant access point for person; Identifier for person

New Concepts

- Alternative labels

- Available under  Element Reference for each element
- Help in understanding direction of relationship elements
- Include “retired” labels from original Toolkit where applicable
 - “Earlier title proper” and “Later title proper” have been subsumed by “title proper”

New Concepts

- Condition/option boxes
 - Replace
 - Optional addition / optional omission
 - Exception
 - Alternative
- When the instruction has at least one condition
 - Option is to apply the instruction
 - The same set of conditions may lead to different options

Single Condition/Option

Additional elements for a part or parts of a work

One part of a work

CONDITION

A work is a single part of a whole work that is not a diachronic work.

A part has a value of Work: **preferred title of work**  that is a distinct title.

OPTION

Include a value that is based on Work: **preferred title of work**  that is the title for the part.

Include a value of Agent: **authorized access point for agent**  for the creator of the part as applicable. See **Additional elements for creator of work** .

Single Condition/Multiple Options

Names found in a non-preferred script

CONDITION

A name appears in a script that differs from a preferred script of the agency creating the data.

OPTION

Transliterate the name according to the scheme chosen by the agency.

OPTION

Record the form of name that appears most frequently in reference sources in a language preferred by the agency creating the data..

Options, No Conditions

Recording an unstructured description

OPTION

Record a value that is selected within a vocabulary encoding scheme as a preferred form of Manifestation: [title of manifestation](#).

Record the vocabulary encoding scheme in which the title is preferred. For general guidance, see Data provenance: [Recording a source of metadata](#).

OPTION

Record a value of Manifestation: [title of manifestation](#).

Record a Manifestation: [note on manifestation](#) on the source or basis for a title if considered important for identification or access.

Enhanced Concepts

- Relationship designators become relationship elements
 - Inherently reciprocal – inverses formally declared and have their own element pages
 - John Lennon *is person member of corporate body of* The Beatles
 - The Beatles *has person member of corporate body* John Lennon
 - Need to keep Domain and Range in mind – see Element Reference →
 - Domain: Entity that is described by an element
 - Range: Entity that is the value of a relationship element
- Transcription guidelines
 - “Take what you see” – very literal
 - Modified transcription – what catalogers do now: adjust capitalization, add diacritics, etc.

Domain
Person
Range
Corporate Body
Alternate labels
is person member of corporate body of

Enhanced Concepts

- **Aggregates**
 - New approach, grounded in LRM
 - More detail later in this presentation
- **Recording methods**
 - Regularization of what was already in RDA
 - Four means of capturing data, not mutually exclusive
 - Unstructured description
 - Structured description
 - Identifier
 - IRI
 - Choice among these is also an option in many cases
 - Need application profile, policy statements, and/or best practices to help choose

Enhanced Concepts

- Agent “breakout”
 - Recent decision to create separate elements for relationships that apply to all types of agents
 - Explicitly declared, rather than relying on the hierarchy
 - Improves training; won’t have to remind catalogers to look for general relationships under “Agent” instead of the more specific “Person” or “Corporate body”
 - Get some odd element names, but these don’t have to be used for display
 - Composer agent of work
 - Composer collective agent of work
 - Composer corporate body of work
 - Composer family of work
 - Composer person of work

Old Concepts, Left Behind

What's Missing?

- Instruction numbers
 - Instead, “citation numbering” coming in April
 - For use with print materials and other non-digital communication
 - Format will likely be ##.##.##
 - Numbers will be random, permanent, and searchable
 - Numbers will be accessible from the popup tool bar
- PDF of index
 - Instead, rely on searching functions
- Actionable links between AACR2 and RDA
 - Too much has changed, too hard to maintain

key of expression



Definition and Scope

A set of pitch relationships that establishes the tonal centre, or principal tonal centre, used, or intended to be used, for performance of musical content of an expression.

Pseudo-Elements

Pseudo-Elements – What Are They?

- Specific instructions that parallel those for actual elements
 - But no entries in the RDA Registry
 - No automatic updates from the RDA Registry to the Toolkit text; must be managed manually
- Four categories (in the original Toolkit as 6.28-6.31)
 - Musical works and expressions
 - Legal works and expressions
 - Religious works and expressions
 - Official communications
- Many “elements” associated with these; some are new in the Beta Toolkit
 - Identifier for musical work

What To Do?

- Keep separate?

- Problem to keep current with changes to the related element(s)
- Search limiting problem in the Toolkit

title of musical work

...title of musical work 6.14 Definition and Scope Element...

Special Last Updated - 02/05/2019

preferred title of work

...preferred title of work 6.2.2 Definition and Scope A title c

for preference in...

Element Last Updated - 02/05/2019

- Will need to work with communities for resolution – no change for now

- Merge with the related element?

- Could create really long element pages
 - **Preferred title of musical work** is about double the length of **Preferred title of work**, and that's before adding legal works, religious works, and official communications!
- Specialized communities want/need the specificity
- It's easier to identify a group of “music instructions” if they remain separate

Aggregates

Three Types of Aggregates

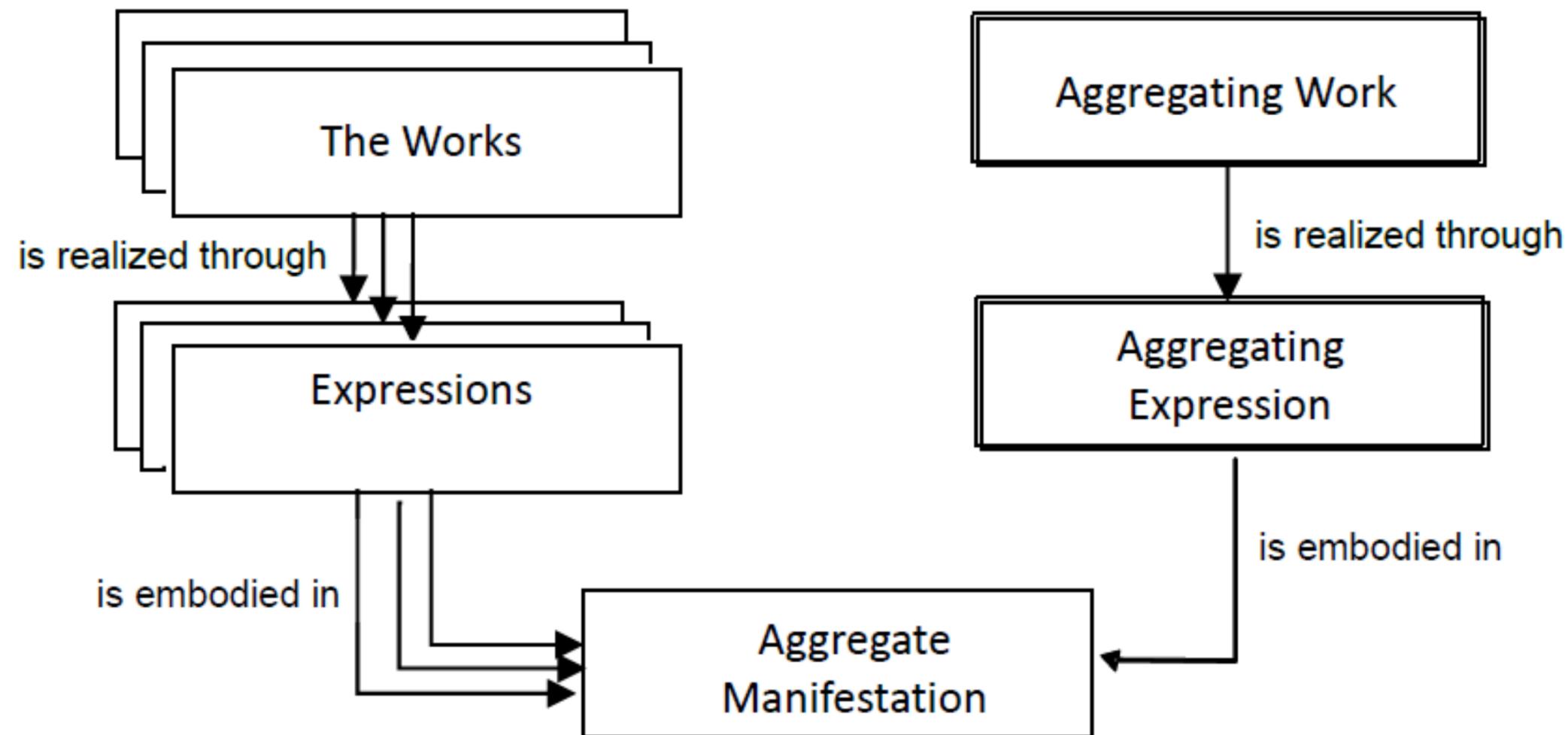
- Collection aggregate
 - Embodies two or more independent works
 - Example: Compilation on CD
 - Catalogers likely to identify each expression in some fashion
- Augmentation aggregate
 - One work/expression supplemented by one or more other works
 - The expression of the “main” work remains unchanged
 - Example: Novel with an introduction and illustrations
 - Example: Full score with added piano reduction
 - Catalogers may or may not identify the supplemental works
- Parallel aggregate
 - Embodies multiple expressions of the same work
 - Example: text in its original language + a translation
 - Catalogers normally identify all of the expressions

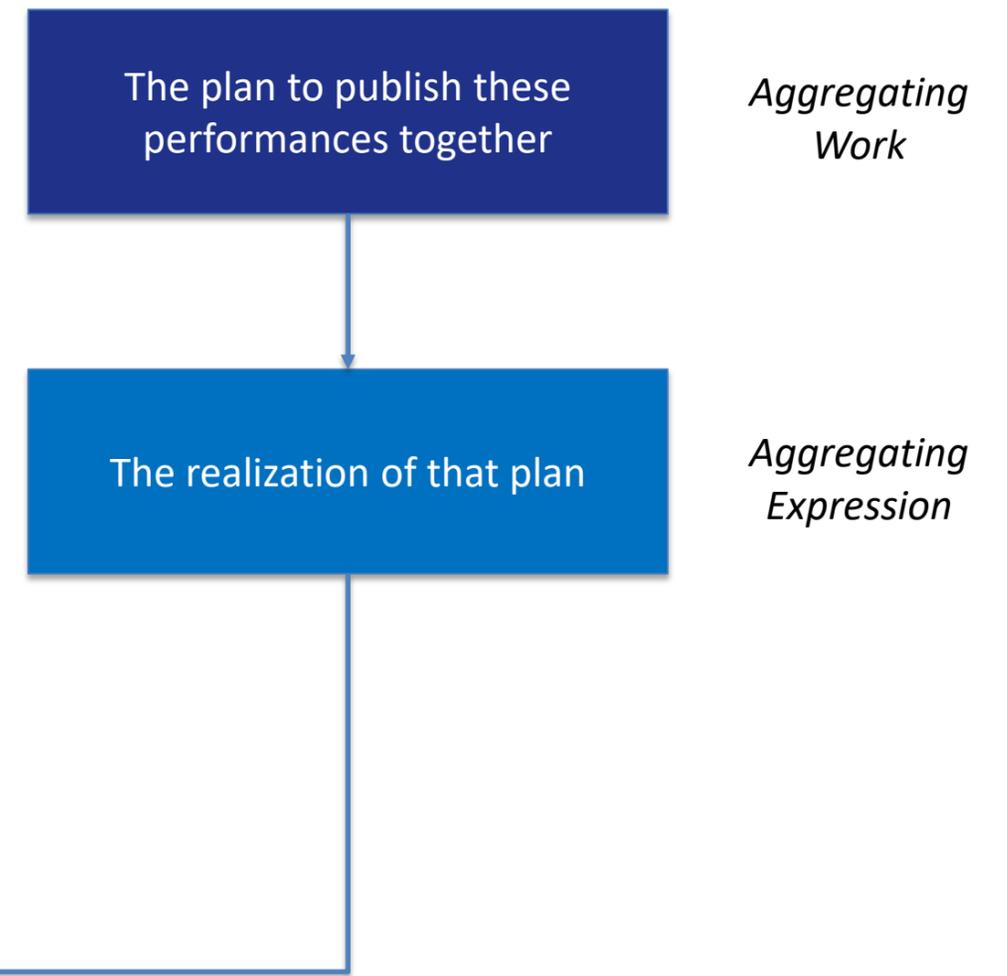
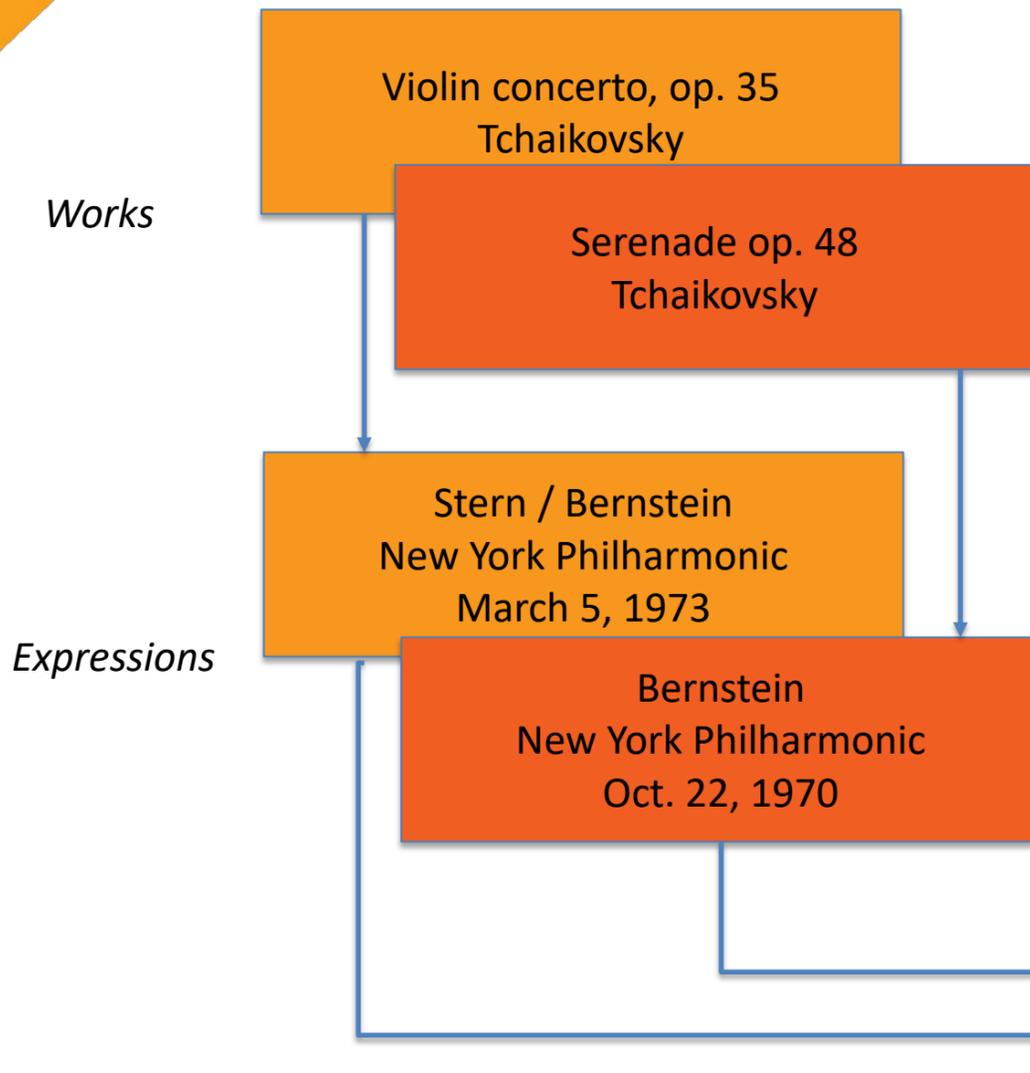
Characteristics of an Aggregating Work

- A plan for bringing together distinct expressions into one or more manifestations – *not the contents*
 - Relationships hold true only for a single aggregating work
 - The creator of the aggregating work comes up with the plan
 - For static works, generally ignore the plan – just catalog the results
- For a static work
 - New manifestation... New aggregating work *if* the content changes
 - Different expressions (e.g., the same musical works, but with different performers)
 - A different combination of expressions (some added, some removed, etc.)
 - New manifestation... No new aggregating work *if* only the carrier changes

LRM's Model for Aggregates

Figure 5.7 General Model for Aggregates





Cataloging an Aggregate

- Start with the manifestation
- Determine what parts you want to describe
 - Choose a recording method for each
 - Unstructured description:
 - Preface by Christopher de Hamel
 - Structured description:
 - De Hamel, Christopher, 1950-, writer of preface [or now, “contributor agent of text”]
 - Carter, Elliott, 1908-2012. Musicians wrestle everywhere
 - Identifier:
 - n 81055107 [LCCN for Bach’s Goldberg-Variationen]
 - IRI:
 - <http://viaf.org/viaf/184117234> [for Slonimsky’s earbox by John Adams]

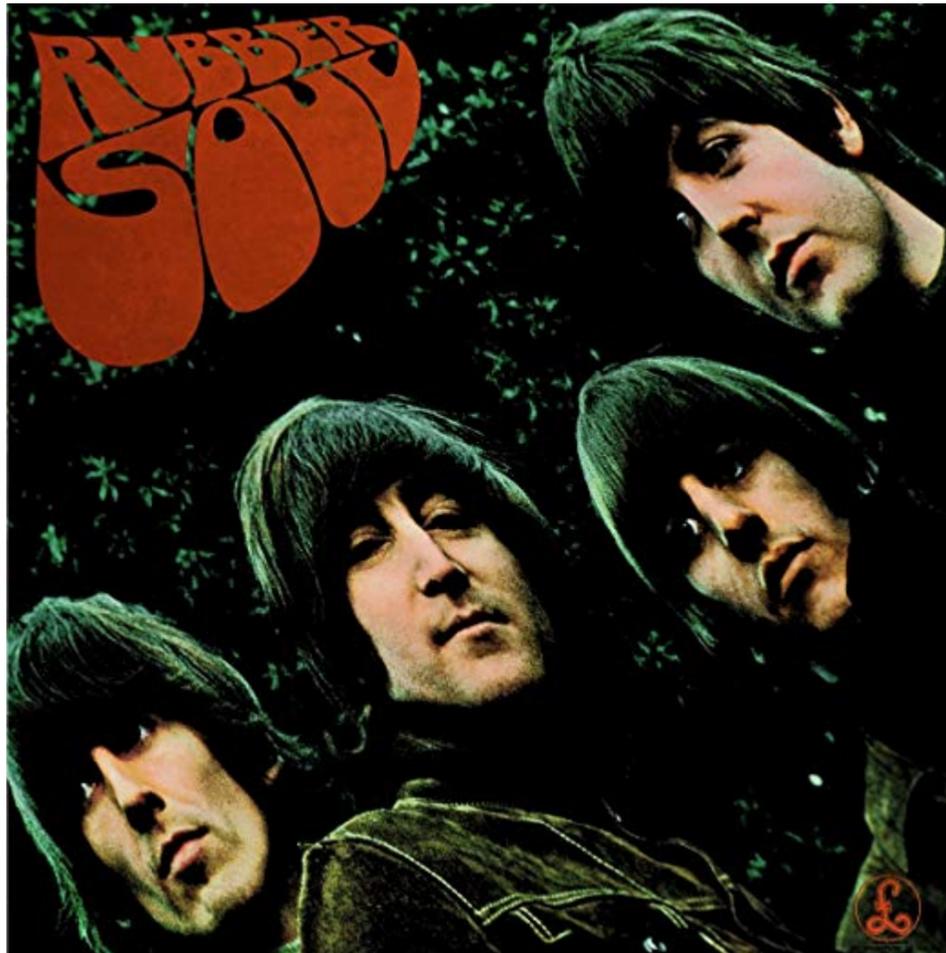
Cataloging an Aggregate

- Link the manifestation to one or more of the aggregating works (in our Tchaikovsky example, this would be to the Concerto *and* to the Serenade)
 - This is a short cut, permitted by the LRM aggregates/aggregated by relationship
- Ignore the aggregating expression, unless the exact same content has been issued on a different carrier
 - When that does happen, create an aggregating expression, and link it to the original and new format aggregate manifestations
- But remember, different content means that you have a different aggregating work, even if the publisher implies otherwise

Beatles' album *Rubber Soul*

Separate UK and US releases

Rubber Soul – British Release, 1965



Side one

1. **Drive My Car** 2:25
2. Norwegian Wood (This Bird Has Flown) 2:01
3. You Won't See Me 3:18
4. **Nowhere Man** 2:40
5. Think for Yourself 2:16
6. The Word 2:41
7. Michelle 2:40

Side two

1. **What Goes On** 2:47
2. Girl 2:30
3. I'm Looking Through You 2:23
4. In My Life 2:24
5. Wait 2:12
6. **If I Needed Someone** 2:20
7. Run for Your Life 2:18

Rubber Soul – US Release, 1965

Side one

1. [I've Just Seen a Face](#) 2:04
2. Norwegian Wood (This Bird Has Flown) 2:05
3. You Won't See Me 3:19
4. Think for Yourself 2:19
5. The Word 2:42
6. Michelle 2:42

Side two

1. [It's Only Love](#) 1:53
2. Girl 2:33
3. I'm Looking Through You 2:24
4. In My Life 2:24
5. Wait 2:15
6. Run for Your Life 2:15



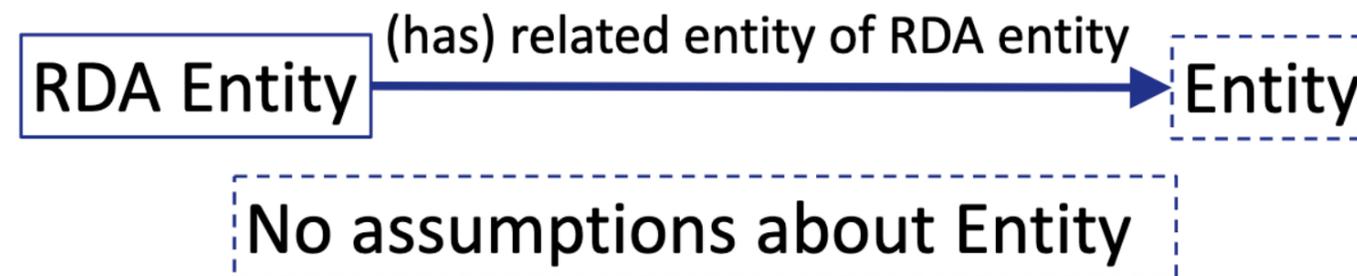
Different, But Closely Related

- The difference in content means these are different aggregating works
 - But they are closely related
 - Use relationship “related work of work” to link them together
 - Although RDA is introducing the concept of “work group”, the definition is too formal to use in this case:
 - A group of two or more works that have a common appellation assigned from a vocabulary encoding scheme

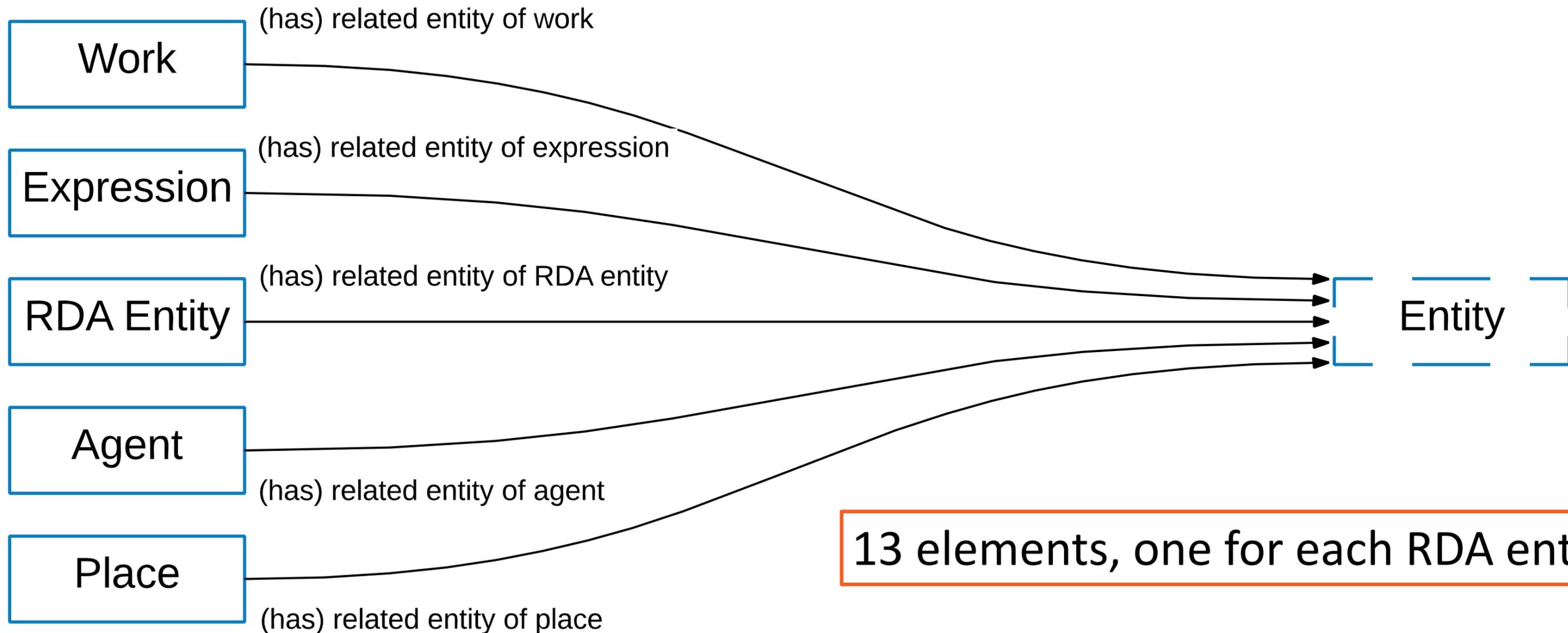
Fictitious Entities, etc.

Changes Driven by LRM

- *LRM Agent*: An entity capable of deliberate actions, of being granted rights, and of being held accountable for its actions
 - *LRM Person*: An individual human being
- Where does that leave fictitious/legendary persons and real non-human entities?
 - Fictitious personages named in manifestation title and responsibility statements are assumed to be pseudonyms of a Person or Collective Agent
 - Accommodated as Nomen, just like any other pseudonym
 - Animals and other non-human performers in manifestation title and responsibility statements (credits) are accommodated as non-RDA entities



Ways to Link Outside of RDA



13 elements, one for each RDA entity

What's the Same (or Similar)?

Many of the Instructions

- Commitment by the RSC that the 3R restructuring process would have minimal impact on current practice
 - Except when instructions had to change as part of implementing LRM
- Kept existing instructions whenever possible
 - Some rewording may have occurred, but outcome of applying these instructions should be similar
 - Will have “soft-deprecated” elements
 - Details of duration [RDA 7.22.1.5] present in Beta Toolkit, but...
 - The better approach is: recording this as an *unstructured description of duration*
- With more options about how to record data
 - Can keep recording data the same way
 - Can try something different that works better for your cataloging environment

New Toolkit – Old Toolkit

CONDITION

The manifestation has multiple copyright dates that apply to various aspects (e.g., text, sound, graphics).

OPTION

Record each of the dates that are considered important for identification or selection.

OPTION

Record each date as a copyright date of a related manifestation.

OPTION

Record a Manifestation: [note on copyright date](#) giving the copyright dates.

If the manifestation has multiple copyright dates that apply to various aspects (e.g., text, sound, graphics), record any that are considered important for identification or selection.

EXAMPLE

©2009

©2010

Source of information reads: ©2010, disc ©2009

...

Optional Addition

Make a note giving the other copyright dates (see [2.17.10.3 RDA](#)) or record the other dates as copyright dates of related manifestations (see [27.1 RDA](#)).

Some Similar Glossary Definitions

- Original Toolkit: **place of capture**
 - A place associated with the recording, filming, etc., of the content of an expression.
- Beta Toolkit: **place of capture**
 - A place that is associated with recording, filming, etc., the content of an expression.
Inverse: place of capture of
- Original Toolkit: **date of birth**
 - A year a person was born.
Date of birth may also include the month or month and day of the person's birth.
- Beta Toolkit: **date of birth**
 - A timespan during which a person was born.
Inverse: date of birth of



For More Information

RDA Resources

- RDA Steering Committee website: <http://www.rda-rsc.org/>
 - Presentations page: <http://www.rda-rsc.org/rscpresentations>
 - Presentations made by RSC members at ALA Midwinter: <http://www.rda-rsc.org/node/589>
 - 3R Project Frequently Asked Questions: <http://rda-rsc.org/node/551>
 - RDA Frequently Asked Questions: http://rda-rsc.org/content/rda_faq
- RDA Toolkit website: <https://www.rdatoolkit.org>
 - 3R Project updates: <https://www.rdatoolkit.org/3RProject>
- Beta Toolkit: <https://beta.rdatoolkit.org/RDA.Web/>
 - Must have a login to the original Toolkit, or make arrangements with ALA Publishing
- RDA YouTube channel: <https://www.youtube.com/c/RDAToolkitVideo>

Questions?

Ask now, or email me later at:
RSCChair@rdatoolkit.org