



# Getting Ready for RDA: What You Need to Know

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for Massachusetts Library Association Annual Conference  
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I have based today's presentation on several of my earlier presentations, so if you who have heard me cover this before, hearing it again from a different perspective may allow you to see different connections.

## Outline

- What is RDA?
- RDA Online
- Implementation of RDA
  - Training, documentation
  - RDA test plan/timetable

Here is the outline of what I intend to talk about – first to review what RDA is and our new environment, then I'll give a very brief demonstration of the RDA Web product, and finally will talk about how to get ready for RDA – some implementation issues and the plans for testing here in the United States.



In the late 1990's those of us on the Joint Steering Committee for Revision of the Anglo-American Cataloguing Rules decided to actively try to make changes for the future of the *Anglo-American Cataloguing Rules*. We realized that all these changes in our environment and the development of conceptual models that give us a new way to look at our environment, also gave us new opportunities for improving how we catalog and how we deliver bibliographic information to users. In 1997, we held the **International Conference on the Principles & Future Development of AACR** in Toronto. We invited experts from around the world to share in developing an action plan for the future of AACR.

Some of the recommendations from that meeting have guided the thinking about new directions, such as the desire to document <click> the basic principles that underlie the rules and <click> explorations into content versus carrier and <click> challenging the logical structure of AACR. Some recommendations from that conference have already been implemented, like the <click> new views of seriality – with continuing resources and harmonization of serials cataloging standards among the ISBD, ISSN, and AACR communities. Other recommendations from that conference are still dreams, like <click> further internationalization of the rules for their expanded use worldwide as a content standard for bibliographic and authority records. But we now want to make those dreams a reality.

In 2002 work began on a draft revision of AACR2 then called AACR3. However, by April 2005, the plan had changed. The reactions to the initial draft of AACR3 particularly raised concerns about the need to move to closer alignment with the FRBR model and to build an element set. So, a new structure and plan were developed and the name was changed to *Resource Description and Access* to emphasize the two important tasks of description and access. Importantly from the world perspective, we removed the Anglo-American emphasis so we could take a more international view.

## JSC and Project Management Team



Tom Delsey, editor; John Attig, ALA; Hugh Taylor, CILIP; Deirdre Kiorgaard, ACOC; Barbara Tillett, LC; Marg Stewart, CCC /JSC Chair; Alan Danskin, BL; Nathalie Schulz, JSC Secretary; Marjorie Bloss, RDA project manager

The Joint Steering Committee for Development of RDA met in Chicago in March of 2009. This picture is from that meeting. This picture includes the JSC and the RDA editor, Tom Delsey and secretary, Nathalie Schulz on the right; and our project manager, Marjorie Bloss on the left. Our chair, Marg Stewart from Canada is in front at the left with white hair.

Left to right –Marjorie Bloss – RDA Project Manager

Marg Stewart, CCC (LAC) and the chair of the Joint Steering Committee

Alan Danskin – BL – he will be the new chair in July

John Attig – ALA

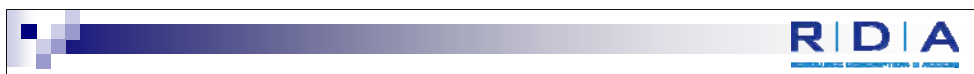
Myself, Barbara Tillett – Library of Congress

Deirdre Kiorgaard – ACOC – former chair of the JSC

Hugh Taylor – CILIP

Nathalie Schulz, the JSC secretary, and

Tom Delsey, the RDA editor



**R | D | A**

## Public Website

<http://www.collectionscanada.gc.ca/jsc/rda.html>

**R | D | A**

**RESOURCE DESCRIPTION & ACCESS**

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We have a JSC Web site where we have posted all of the drafts for RDA and the responses to the drafts as well as other information we hope you will find helpful.

There are some Frequently Asked questions (FAQs) and other documents we hope you will find helpful in seeing the changes from AACR2 and in understanding what issues we have planned to work on following the first release of RDA.

## GOALS: *RDA* will be ...

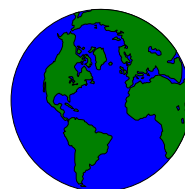
- A new standard for **resource description and access**
- Designed for the **digital** world
  - Optimized for use as an online product
  - Description and access of all resources
    - All types of content and media
  - Resulting records usable in the digital environment (Internet, Web OPACs, etc.)

The Joint Steering Committee stated our goals for RDA as follows: We envision RDA as a new standard for resource description and access, designed for the digital world.

In other words RDA will be: a Web-based tool that is optimized for use as an online product, a tool that addresses cataloguing all types of content and media, and a tool that results in records that are intended for use in the digital environment – through the Internet, Web-OPACs, etc. The records created using RDA will be readily adaptable to newly emerging database structures.

## *RDA* will be ...

- A consistent, flexible, and extensible framework
- Compatible with internationally established principles, models, and standards
- Primarily for use in libraries, but also adaptable across many information communities worldwide



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The Goals in the RDA Strategic Plan declare that RDA will provide a consistent, flexible, and extensible framework for both the technical and content description of all types of resources and all types of content; that it will be compatible with internationally established principles, models, and standards.

While RDA is being developed for use in English language communities, it can also be used in other language communities. We are expecting that other countries will translate it and adjust its instructions to follow their preferred language and script conventions just as there are now many translations of AACR2. Options are also being added to allow for use of other languages and scripts, other calendars, other numeric systems, etc., beyond those commonly used in Anglo-American countries.

We also intend that RDA will produce information that is compatible across many communities like publishers, archives, museums, and other information organizations.

## What's changing?

- Changes in technology
  - Impact on descriptive/access data
    - book catalogs
    - card catalogs
    - OPACs
    - next generation
- Move from individual library to international audience
- Move from classes of materials to elements and values (more controlled vocabularies)

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RDA is a new cataloging code designed for the digital environment. As with other cataloging codes before it, RDA reflects both the technology of the time and the types of materials that we are organizing, describing, and making available to our users.

The goals for RDA are directly targeted to improve how we catalog and to take better advantage of today's digital environment. Over the past two centuries, we have moved from book catalogs to card catalogs to OPACs. We now are ready for the next generation of systems that use machines to search and display the rich metadata that we provide. Our metadata is our cataloging information. RDA also recognizes that this cataloging data has value beyond an individual library and in fact reaches an international audience.

One of the most significant changes from AACR2 is the move in RDA from AACR2's class of materials concepts to identifying elements needed to describe things in order to be more useful on the Web. RDA offers more specific controlled vocabularies for some of the elements to prepare us to use machines to manipulate the data more than ever before.



# Internet

<http://www>

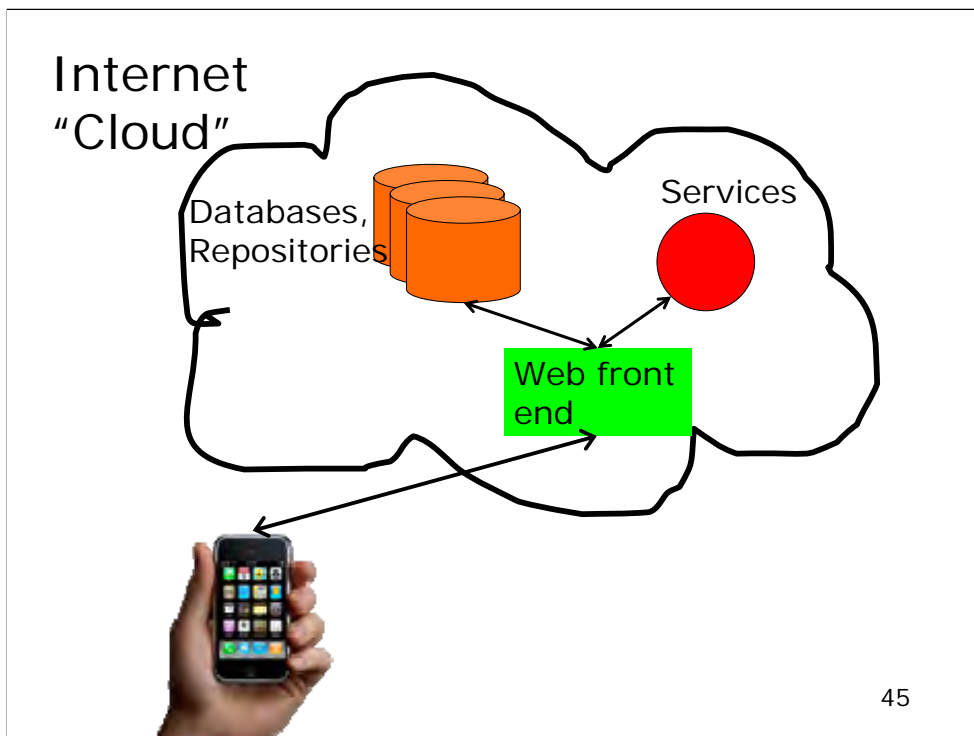
- Catalogs are no longer in isolation
  - Global access to data
- Integrate bibliographic data with wider Internet environment
  - Share data beyond institutions



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The evolution of technologies took a major turn with the creation of the Internet. Catalogs are no longer just stand-alone, end points in isolation, like book catalogs, card catalogs, or stand-alone OPACs of the past. Catalogs and especially bibliographic data from any source can now be integrated into the wider Internet environment. New kinds of links can be made, new displays can be generated for users from data packaged in new ways – all of it on a global scale in multiple languages and scripts.

We now have the technology to provide global connection anywhere that computers can operate – that includes the digital connections of cell phones with Internet connections.



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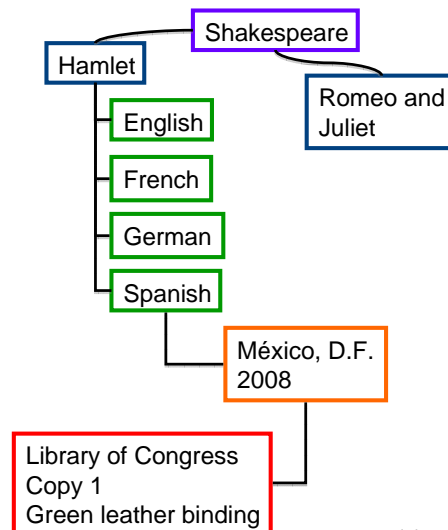
The information systems and content in the future hopefully will be freely accessible on the Web – I imagine it as something like the Internet cloud computing that we have today with Amazon, Google, and other systems – (this cloud computing image is based on one from Wikipedia) – where the elements that describe our resources are available to libraries and users everywhere in the world through a Web front end that connects the users to services and data – the data may come from publishers, from the creators of the resources, from libraries and other institutions, or anywhere, and is accessible by any user, anywhere in the world, at anytime.

Bibliographic data and digital resources are on the Web now and we've started adding the controlled vocabularies to help identify resources – such as the controlled values for naming the types of content, types of carriers, and other elements that are already being registered on the Web and can be used to present displays and show pathways to related resources. FRBR prepares us to identify all the elements – the identifying characteristics of all the things we have in our collections in a way that machines and the Internet can manipulate for more useful displays for users.

# Linked Data

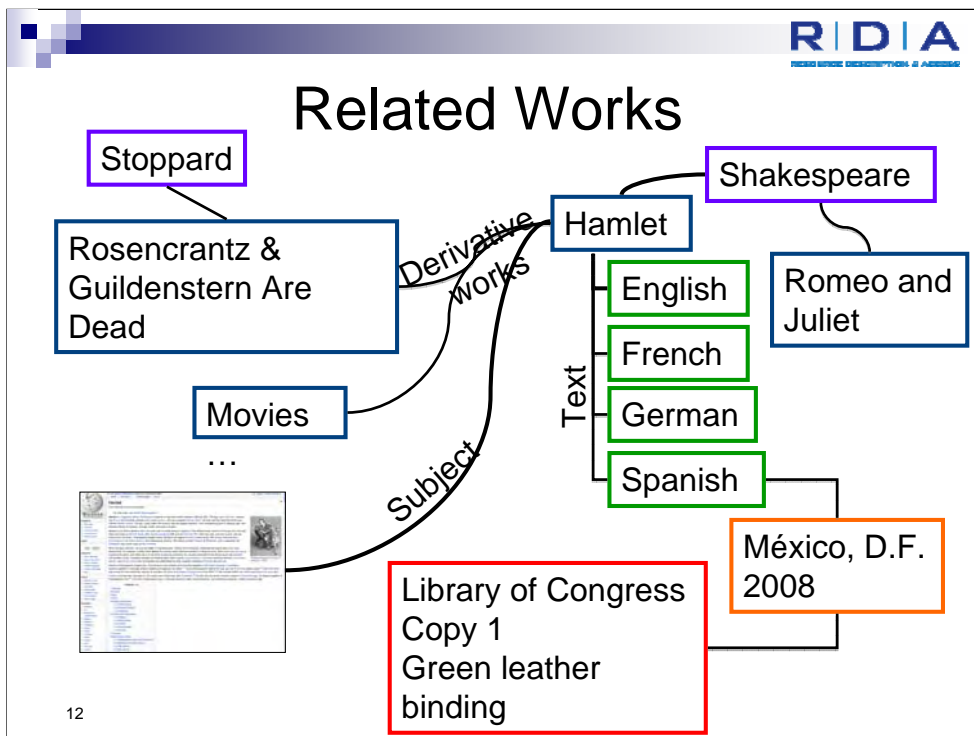
## ■ Display

- All the works associated with a person, etc.
- **All the expressions of the same work**
- All the manifestations of the same expression
- All items
- Related works/expressions



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We hope future systems will be developed to take full advantage of mining the metadata catalogers provide. It should be easier to fulfill the functions of a catalog to display all the <click> works associated with a person – like all the works of Shakespeare, all the <click> expressions of the same work – such as the translations in different languages, all the <click> manifestations of the same expression, and all the <click> items and their special characteristics, plus...



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all related works <click> to movies or plays based on Hamlet – all of this to guide a user through our rich collections and beyond – this shows the connection to the Wikipedia article about Hamlet.

And once we are able to share this linked data on the Internet, we can offer resource discovery systems that will make cataloging much easier by describing once the works/expressions and their relationships to other works/expressions and subjects and links for the various manifestations – as we add new resources to our collections.

RDA is preparing us for the future by describing specific elements to identify entities and stating specific relationships that can be used by machines in linked data environments.

## Collaborations with other Metadata Communities

- ONIX (Publishers) – types of content, media, carriers
- RDA, Dublin Core, IEEE/LOM, Semantic Web

- “Data Modeling Meeting” - London 2007



- RDA/MARC Working Group (MARBI)

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The Joint Steering Committee has paid close attention to developments in other metadata communities, and initiated collaborations with the publishers who were developing their own metadata set called ONIX. Together we developed controlled vocabularies for media types, content types, and carrier types.

In 2007, JSC representatives met at the British Library with key representatives from Dublin Core, IEEE/LOM, and Semantic Web communities and agreed to examine the fit between RDA and other metadata models. Together we have created an initial registry for the RDA elements and controlled terms, available freely on the Web.

In 2008 the JSC started participating in a joint effort to determine what revisions are necessary to accommodate the encoding of RDA in MARC 21 for the initial release of RDA. This RDA/MARC Working Group presented proposals to MARBI at their meeting June 2008 and many were approved at the MARBI meeting in January 2009 and more for discussion at the July meeting.

## RDA Structure

- General introduction
- Elements
- Relationships
- Appendices
  - Capitalization, Abbreviations, Initial articles, etc.
  - Presentation (ISBD, MARC, etc.)
  - Relationship designators
  - Etc.
- Glossary
- Index

This shows RDA's current structure.

There will be a general introduction to provide background.

Then the instructions are arranged to begin with describing a manifestation and then the work and expression it contains. RDA also includes instructions about identifying persons, families, corporate bodies, places, and has placeholders for concepts, objects, and events. It includes all of the elements needed to describe each kind of entity.

Then follow chapters with guidelines on making relationships among the entities.

At the end are appendices about such things as capitalization, abbreviations, and initial articles plus an appendix on how to present descriptive data (including the ISBD display format and the MARC 21 mapping to RDA elements) and how to present authority data. Three appendices cover relationship designators, things like the roles a person or corporate body can play in relation to a work, expression, manifestation, or item - and there will be a glossary and an index.

But also remember this is an online Web-based tool that will have keyword access.

## General Principles (ICP)



- Convenience of user
- Representation
- Common usage
- Accuracy
- Sufficiency and necessity
- Significance
- Economy
- Consistency and Standardization
- Integration
- Defensible, not arbitrary
- If contradict, take a defensible, practical solution.

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RDA is being based on the new IFLA “International Cataloguing Principles” (ICP). IFLA has now approved a new Statement of International Cataloguing Principles, known as ICP – International Cataloguing Principles – that covers both bibliographic and authority records and all types of resources.

You notice the first principle is convenience of the user, because we are after all cataloging to help our users. Also take a look at the other principles. We want bibliographic data to be easy to understand by our users (“common usage”) and to provide only as much metadata as is needed to meet user tasks (“sufficiency & necessity”) - to provide accurate data (“accuracy”) and the minimally necessary elements to identify the resources (“economy”). In addition the cataloger should include data to help the user navigate the pathways to related resources. And if principles seem to contradict each other in a particular situation, the cataloger should take a defensible, practical solution. The idea is to build cataloger’s judgment in deciding how to describe or provide access to bibliographic resources.

## Transcription – Principle of Representation in RDA

- “Take what you see”
  - Correction of inaccuracies elsewhere
  - No more abbreviating
- Accept what you get
  - Facilitating automated data capture

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To give you an idea of how following these principles means a change from AACR2, let's look at the principle of representation shown on the previous slide. This comes into play for transcribed information. RDA will simplify the process of transcription by usually “taking what you see” on the resource – this eliminates many of the AACR2 rules that instruct catalogers to alter the data that they are transcribing. For example, in RDA, inaccuracies will be recorded as they are found on the item, and the corrected data will be provided separately, if needed. This and other simplifications to the transcription rules are designed to facilitate automated data capture and reusing metadata from other sources, such as from publishers – that some of us now capture from ONIX data. Catalogers will also have more flexibility in RDA to take capitalization as it appears and will take abbreviations as they appear on the resource in most cases. The similarities and differences between RDA and AACR2 will be pointed out during training.

In fact, the Joint Steering Committee has already started to provide documentation for trainers to help prepare for a smooth implementation. One particularly useful document will be updated very soon – the “Changes from AACR2”. The Library of Congress also has started preparing examples of records created with AACR2 and RDA to compare. – (Brought as a handout for you)




## Sample Changes from AACR2

- Transcribed data
  - Option to keep rule of 3
    - e.g., [and five others] – no more “... et. al.”
  - First place of publication is “core”
- Access points (transition)
  - Bible, Treaties
  - No more “Polyglot”
  - Birth/death dates (no more b. or d.)

With RDA, the rule of 3 is optional. Also with RDA you will just document the first place of publication (others can be added if you wish), but there is no need to add the place in your own country unless your library wishes to.

For Access points, there are some major changes for the Bible to enter chapters directly and stop using O.T. and N.T. for the old and New Testaments, and there are some changes we hope to simplify the choice of access points for treaties. There also will no longer be the use of “Polyglot” as that is very unfriendly in an online world where users want to limit their choices by language.

You also will no longer use b. or d. for birth or death dates, as RDA tries to avoid abbreviations and birth date and death dates are separate elements.

	
<h2>New Terminology</h2>	
<i>AACR2 terms</i>	<i>RDA terms</i>
Main Entry	
Uniform title	Preferred title Name of the work (to include name of creator when applicable)
Authority control	

With RDA we are making an attempt to update the card catalog-based terminology that remains in AACR2. AACR2 uses two problematic terms – main entry and uniform title. Main entry can either refer to the authorized heading or to the whole bibliographic record. The term ‘Uniform Title,’ is problematic because it has multiple meanings in AACR2. It can be a collocating title for a work, a unique/distinguishing title for a work, a standardized collective title, and so on). So instead of using this term, RDA uses the term ‘Preferred title’ for a work. When we link a preferred title with the name of the creator, we have an ‘authorized access point’ for the work that “names the work.”

We’re also moving away from using the term “authority control.” This is because with new technologies, we have more options for controlling the display form of a name for an entity based on an authority record that clusters together all the variant forms of name – we will probably continue to declare one form as a default “authorized” or “preferred access point” but on the Internet any of the variant forms identified with an entity may be used for display – this lets us display a form that fits best with a user’s need for a particular language or script.

## New Terminology

### *AACR2 terms*

Heading  
Added Entry  
Authorized heading  
See references  
Elements

### *RDA terms*

Access point  
Access point  
Authorized access point  
Variant access point  
Elements (FRBR =  
Attributes)

The AACR term "heading" of course comes from the text that was typed at the top or "head" of a catalog card. We are replacing that term with "access point."

Main Entry and Added Entry headings will become "access points".

The information we give in see references will be recorded as "variant access points."

RDA did keep the term "element" as used in ISBD, even though FRBR calls these identifying characteristics "attributes" – but in RDA they are the specific information needed to identify each entity that we wish to describe. They are independent of any display of communication format. But of course for now we will continue to package them in the MARC records we are used to.

## RDA Elements

- “Core”
- Content Types, Media Types, and Carrier Types to replace GMDs
- Other examples of new elements:
  - File characteristics for digital materials
  - Video format characteristics
  - Custodial information for archival resources
  - Braille characteristics

RDA will have a “core” set of elements recommended for the identification of each entity.

A few new elements have been added to RDA: some to solve problems in AACR2 and some to add elements that are lacking in AACR2.

Data elements for Media type, Carrier type, and Content type will be used instead of the GMDs (general material designators) currently in AACR2. One of the complaints about the GMDs now found in AACR2 is that they are not consistent – being a mixture of content and carrier types and the lists are incomplete.

Content types include such things as text, image, sound, cartographic content, notated movement – they describe the work/expression.

Carrier types are categories of the kinds of packages to convey information – the carriers in which or on which we record content, such as a volume, microfiche, videocassette, globe, etc. These carrier types all map to specific Media types, which are actually “bucket” terms or clustering terms, such as audio, video, unmediated – once systems become more sophisticated, we may find we do not need to explicitly identify the media type in our bibliographic records, because a machine could do that for us.

Other elements, such as the examples shown on the slide, are missing in AACR2 - file characteristics, video formats, archival

# RDA Element Analysis

- RDA element (domain: manifestation)
  - Title
    - Title proper
    - Parallel title
    - Other title information
    - Variant title
    - Key title
    - Abbreviated title
  - element
    - element sub-type
    - element sub-type
    - element sub-type
    - element sub-type
    - element sub-type
    - element sub-type

In RDA the concepts are still those we are familiar with, but they are being expressed differently as a set of elements, element sub-types, and sub-elements to make the data more usable on the Web. There is a table of all of the RDA elements indicating their names and properties that you can find on the JSC Web site.

This element-based approach of well-structured metadata makes the data in our descriptions more usable on the Internet, because this is similar to structures being used by other metadata communities and we hope it will facilitate machine-actionable search, retrieval, and displays of data in ways more relevant to user needs.

All of the RDA elements and the values we have established for some of the elements, like the list of controlled terms we use to identify the types of content, are being made available on the Web as registries to help future Web applications.

## RDA Element Analysis

- RDA element (domain: manifestation)
  - **Publication statement**
    - Place of publication
    - Parallel place of publication
    - Publisher's name
    - Parallel publisher's name
    - Date of publication
  - **element**
    - sub-element
    - sub-element
    - sub-element
    - sub-element
    - sub-element

Here's another piece of the element analysis table: you see again we have familiar things – a publication statement (as in the ISBD) that has sub-elements of place, publisher's name, and date.

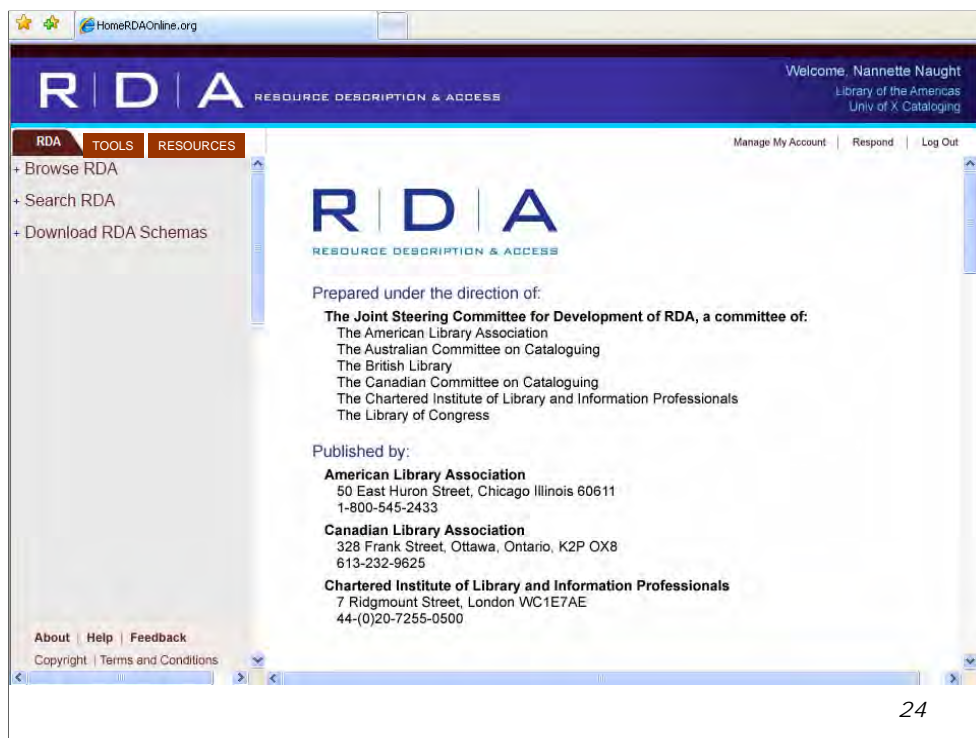
## JSC Working Documents

- RDA Table of Contents
- Changes from AACR2
- Issues deferred until after the 1<sup>st</sup> release
- RDA Elements Table

<http://www.collectionscanada.gc.ca/jsc/working1.html>

The JSC Web site now has some additional background documents we think you will find useful –at the URL (Web address) shown here.

In particular besides the table of contents, I think you will find the document on “Changes from AACR2” to be very helpful – the version currently on the JSC site is from last November and it will be updated soon to reflect decisions made at the JSC’s March meeting. We also have compiled a list of issues deferred until after the 1<sup>st</sup> release, and that also will be updated soon. Another useful document – also to be updated soon on the JSC Web site – is the listing of all of the RDA elements.



Let's now take a look at a very short demonstration of a prototype of the RDA Web product to show you some of the planned functionality, based on some mocked up pages from Nannette Naught, who is on contract with the publishers of RDA to help develop the RDA Online web tool. The Web page is envisioned to have a navigation pane on the left and a large document pane on the right.

There are 3 tabs for the basic RDA content, a tab for tools, and a tab for other cataloging resources.



## Browse RDA: Click through Active Table of Contents to Access Related Instructions

The screenshot shows the HomeRDAOnline.org website. The navigation pane on the left is expanded to show the RDA tree structure. A red arrow points from the 'Carrier Type' link in the tree to the corresponding section on the right. The main content area displays the following information:

**3.3 Carrier Type**  
CORE ELEMENT

**3.3.1 Basic Instructions on Recording Carrier Type**

**3.3.1.1 Scope**  
**Carrier type** reflects the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run, etc., the content of a resource.

**3.3.1.2 Recording Carrier Type**  
Record the type of carrier used to convey the content of the resource using one or more of the terms listed below. Record as many terms as are applicable to the resource being described.

*Alternative*  
If the resource being described consists of more than one carrier type, record only

- the carrier type that applies to the predominant part of the resource (if there is a predominant part)
- or
- the carrier types that apply to the most substantial parts of the resource (including the predominant part, if there is one)

using one or more of the terms listed below, as appropriate.

**Audio carriers**  
audio cartridge

On the left side, under the RDA tab, see a table of contents as a Browse Tree that will continue to expand (or collapse) based on your click(s). Here, our selection of Chapter 3, section 3.3, refreshes the Document Pane with Chapter 3, section 3.3 text. When you click on the left (navigation pane) it brings up the text of that instruction on the right.

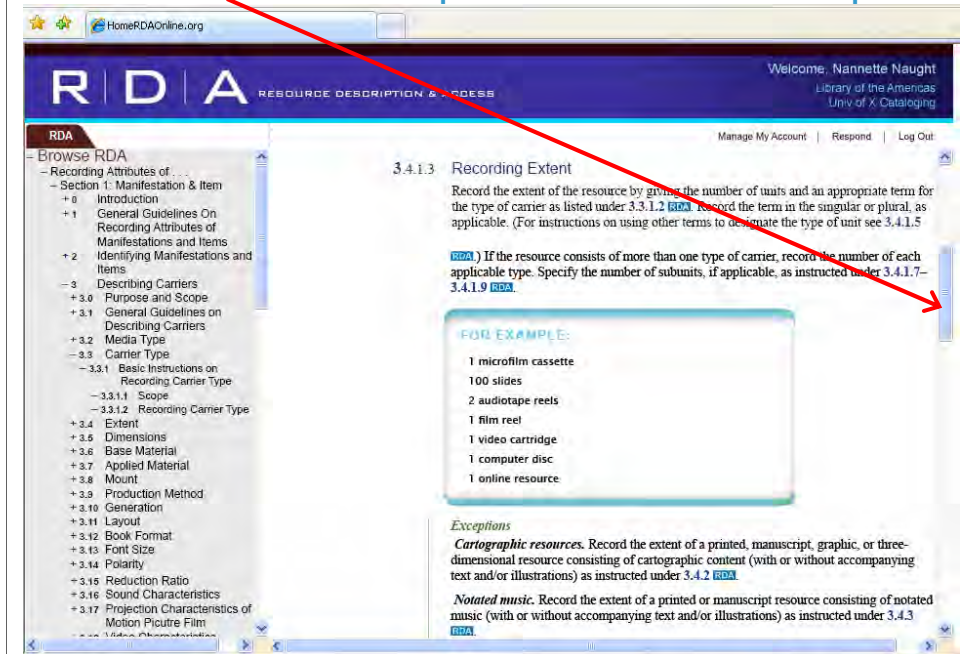
## Scroll TOC: Move Up & Down Within the Table of Contents

The screenshot shows the RDA (Resource Description & Access) website. The left pane contains a Table of Contents (TOC) with a scroll bar. A red arrow points to the scroll bar. The right pane displays the content for section 3.3, 'Carrier Type', including sub-sections 3.3.1.1 'Scope' and 3.3.1.2 'Recording Carrier Type'. The document pane is unaffected by the TOC scroll bar.

To scroll the Table of Contents, move the Browse Tab's scroll bar up or down. The Document Pane is unaffected.

To synch the Document Pane to a specific Table of Contents location, click the corresponding heading on the Browse Tab.

## Scroll Text: Move Up & Down Within Chapter



The screenshot shows the RDA (Resource Description and Access) website interface. The main content area displays the 'Recording Extent' section (3.4.1.3). The text in this section reads: 'Record the extent of the resource by giving the number of units and an appropriate term for the type of carrier as listed under 3.3.1.2 RDA. Record the term in the singular or plural, as applicable. (For instructions on using other terms to designate the type of unit see 3.4.1.5 RDA.) If the resource consists of more than one type of carrier, record the number of each applicable type. Specify the number of subunits, if applicable, as instructed under 3.4.1.7–3.4.1.9 RDA.' Below this text is an 'EXAMPLE:' box containing a list of carrier types and their quantities: '1 microfilm cassette', '100 slides', '2 audiotape reels', '1 film reel', '1 video cartridge', '1 computer disc', and '1 online resource'. The 'Recording Extent' section is followed by an 'Exceptions' section, which includes 'Cartographic resources' and 'Notated music'. The left sidebar shows the 'Browse RDA' navigation menu, which is unaffected by the scroll bar. A red arrow points to the scroll bar on the right side of the document pane, indicating that it can be used to scroll within the document.

To scroll within the document, move the Document Pane's scroll bar up or down. Notice, the Browse Tab is unaffected.

## Synch TOC: “Snap” Table of Contents to Current Location in Chapter

The screenshot shows the RDA (Resource Description & Access) interface. The main content area displays the 'Extent' section (3.4) and its sub-sections (3.4.1, 3.4.1.1, 3.4.1.2, 3.4.1.3). The 'Synch TOC' option in the Document Menu is circled in red. The interface includes a navigation pane on the left, a header with the RDA logo and user information, and a document menu on the right.

To synch the Browse Tab to your current location within a document, click Synch TOC on the Document Menu. The Browse Tab will refresh.

## Bookmark: Flag an Important Spot in Text to Come Back To Later

The screenshot displays the RDA (Resource Description & Access) interface. The top navigation bar includes the RDA logo and the text 'RESOURCE DESCRIPTION & ACCESS'. On the right, it says 'Welcome, Nannette Naught' and 'Library of the Americas Univ. of X. Cataloging'. Below the navigation bar, there are links for 'Manage My Account', 'Response', 'Log Out', 'Synch TOC', 'View Text', 'Mark Text', and 'Print Text'. The 'Mark Text' link is circled in red. The main content area is titled '3.4 Extent' and contains sub-sections: '3.4.1 Basic Instructions on Recording Extent', '3.4.1.1 Scope', '3.4.1.2 Sources of Information', and '3.4.1.3 Recording Extent'. A red arrow points from the 'Mark Text' link to a bookmark icon in the left sidebar, which is positioned next to the '3.4.1.3 Recording Extent' section.

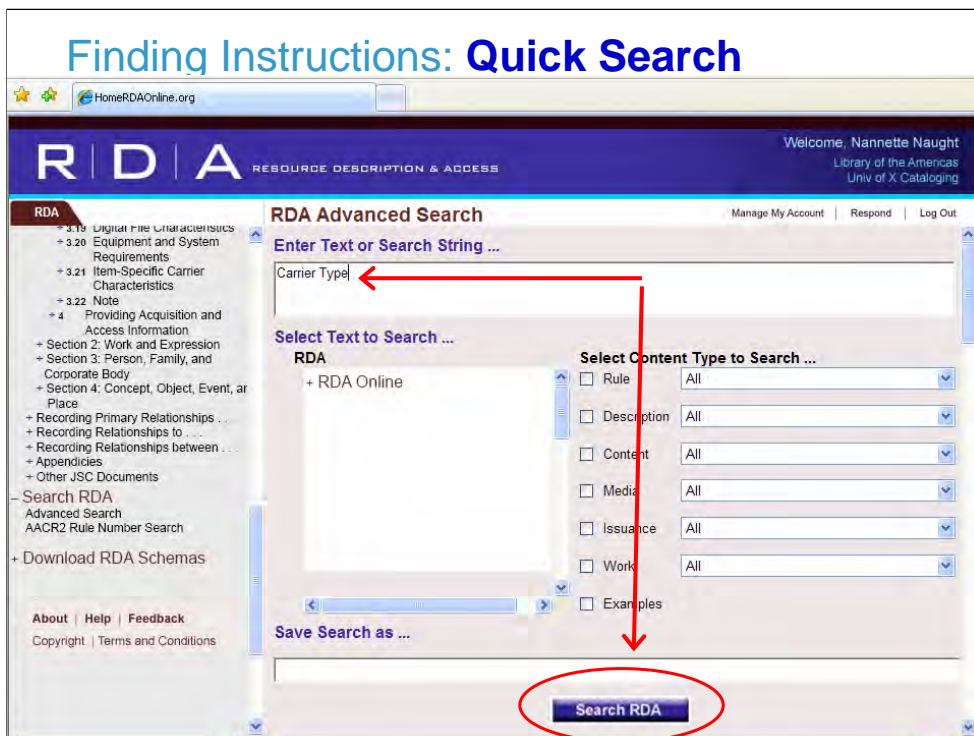
To flag a spot in text for future reference, select Mark Text on the Document Menu and insert a Bookmark, as shown here.

**Annotate: Jot a Comment on a “Sticky Note”**

The screenshot shows the RDA web interface. At the top, the title is "Annotate: Jot a Comment on a 'Sticky Note'". Below the title bar, there's a navigation menu with options like "Manage My Account", "Respond", "Log Out", "Synch TOC", "View Text", "Mark Text", and "Print Text". The "Mark Text" option is circled in red. A red arrow points from this button to a sticky note annotation on the page. The sticky note contains the text: "For software, consult manufacturer's container." The main content area displays "3.4 Extent" and "3.4.1 Basic Instructions on Recording Extent".

To add a comment in text for future reference, select Mark Text on the Document Menu and insert an Annotation, as shown here.

We expect the online Web product of RDA to have the ability to share decisions and annotations to specific instructions, and you should be able to choose to make those comments/decisions known to just your institutions or shared more broadly. We expect the Library of Congress and the Program for Cooperative Cataloging to load our decisions and make them accessible to everyone – to indicate which options or alternative rules we recommend following for our own catalogers.



To quickly search for a word or phrase within RDA Online, type the phrase into the Search String box and click Search RDA. **Note:** If desired, you may enter Boolean operators here as well.

# Quick Search: Web Style Presentation of Results

The screenshot shows the RDA Search results page for the query 'Carrier Type'. The page is titled 'RDA Search: Carrier Type' and displays a list of search results. The results are ranked and grouped by document. The first result is '3.1.4.2 Recording Carrier Type, Extent, and Other Characteristics of Each Carrier' with 9 hits. The second result is '3.3 Carrier Type' with 8 hits and a 'Core' tag. The third result is '3.3.1 Basic Instructions on Recording Carrier Type' with 6 hits and a 'Core' tag. The fourth result is '3.3.1.2 Recording Carrier Type' with 4 hits and a 'Core' tag. The fifth result is '3.3.1.1 Scope' with 1 hit and a 'Core' tag. The sixth result is '3.1.4.3 Recording Predominate Carrier Type and Extent in General Terms' with 5 hits. The seventh result is '3.1.4.1 Recording Only Carrier Type and Extent of Each Carrier' with 4 hits. The eighth result is '3.1.5 Online Resources' with 1 hit. The page also includes a navigation menu on the left, a search bar at the top, and a welcome message for Nannette Naught.

HomeRDAOnline.org

Welcome, Nannette Naught  
Library of the Americas  
Univ of X Cataloging

RDA

RDA Search: Carrier Type

Manage My Account | Respond | Log Out

Results 1 - 9 of 9 for Carrier Type in Chapter 3

**3.1.4.2 Recording Carrier Type, Extent, and Other Characteristics of Each Carrier** (9 hits)  
If a detailed description of each carrier is desired, record in addition to *carrier type* (see 3.3 ) and extent (see 3.4 ), other characteristics as applicable to each carrier ...

**3.3 Carrier Type** (8 hits) **Core**  
*Carrier type* reflects the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run ...

Other Results in 3.3 Carrier Type ...

**3.3.1 Basic Instructions on Recording Carrier Type** (6 hits) **Core**  
*Carrier type* reflects the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run ...

**3.3.1.2 Recording Carrier Type** (4 hits) **Core**  
Record the type of carrier used to convey the content of the resource using one or more of the terms listed below. Record as many terms as are applicable to the ...

**3.3.1.1 Scope** (1 hit) **Core**  
*Carrier type* reflects the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run ...

**3.1.4.3 Recording Predominate Carrier Type and Extent in General Terms** (5 hits)  
For resources consisting of multiple heterogeneous carriers, record the predominant *carrier type* (3.3 ) and record the extent of the resource as a whole, designating ...

**3.1.4.1 Recording Only Carrier Type and Extent of Each Carrier** (4 hits)  
If a detailed description of the characteristics of the carriers is not considered necessary, record only a) the applicable *carrier type* or types (see 3.3 ) and b) ...

**3.1.5 Online Resources** (1 hit)

About | Help | Feedback  
Copyright | Terms and Conditions

Search results will appear in the Document Pane in ranked order. Multiple hits within a document are grouped together. Core element, if present are highlighted.



## Advanced Search: Metadata Driven, Boolean Search

The screenshot shows the RDA Advanced Search interface. The main heading is "RDA" with the subtitle "RESOURCE DESCRIPTION & ACCESS". The user is logged in as "Nannette Naught" from the "Library of the Americas, Univ of X Cataloging". The search form includes a text input field for "Enter Text or Search String ...", a "Carrier Type" dropdown, and a "Select Text to Search ..." section. This section has a tree view of RDA categories, with "Chapter 3: Describing Carriers" selected. To the right, there is a "Select Content Type to Search ..." section with checkboxes for Rule, Description, Content, Media, Issuance, Work, and Examples, each with a dropdown menu set to "All". A "Save Search as ..." field is below the content type section. At the bottom, there is a "Search RDA" button. The left sidebar contains navigation links for RDA, Search RDA, and Download RDA Schemas.

To search RDA Online, complete the Advanced Search form as desired to narrow your search by any or all of the items shown. Here, we have selected to limit our search to Chapter 3 only.

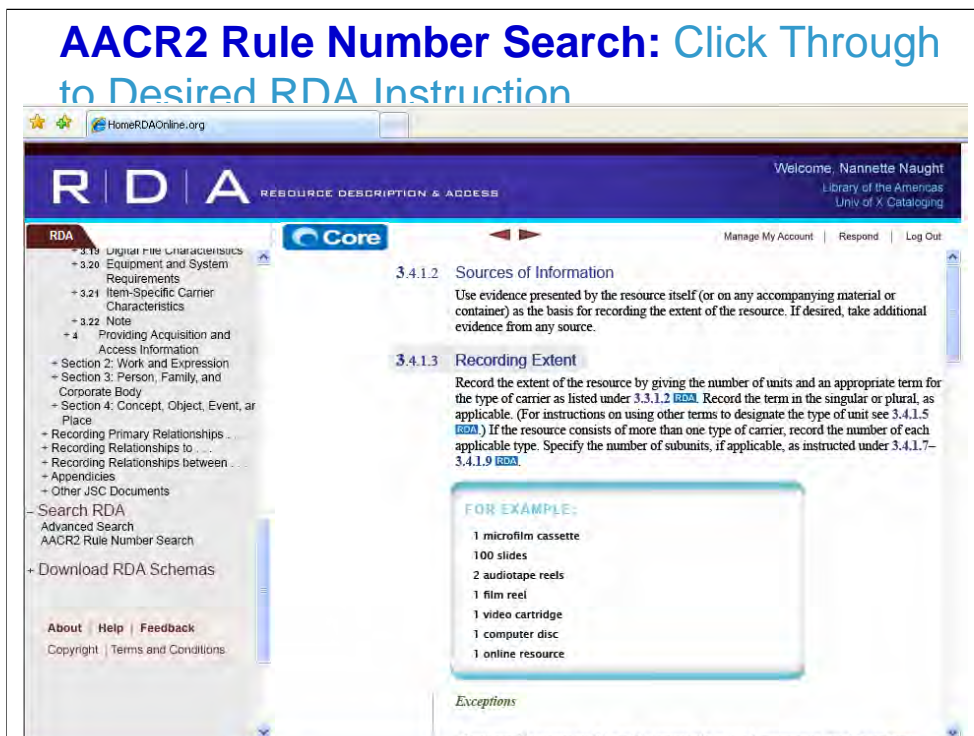
We expect there to be a feature like that shown on the right hand side here to enable you to select which “view” you want of RDA Online – the full view would be all the instructions. Or you could limit the search to just see the core elements. You should be able to limit your view to just a particular mode of issuance – like all the rules for serials or for single monographs or integrating resources – or by content type- like all the instructions relevant to cartographic materials. Once you select what you want to search and set your limits on the search, you click Search RDA at the bottom of the screen.

# AACR2 Rule Number Search: Web Style RDA Driven Presentation of Results

The screenshot displays the AACR2 Rule Number Search interface on the HomeRDAOnline.org website. The page title is "AACR2 Rule Number Search". The search results are presented in a list format, with each result including the RDA instruction number and title, a brief description, and a "Core" indicator. The results are ranked by RDA Instruction Number and Title. The interface includes a navigation menu on the left, a search bar at the top, and a list of search results with descriptions and "Core" indicators. The results are as follows:

- Results 1 - 4 of 4 for AACR2 Rule Number 1.5B1 and/or 1.5B3 in Chapter 3
- 3.4.1.3 Recording Extent (Core)  
Record the extent of the resource by giving the number of units and an appropriate term for the type of carrier as listed under 3.3.1.2. Record the term in the singular ...
- 3.4.1.5 Other Terms Used to Designate the Type of Unit (Core)  
Use a term in common usage (including a trade name, if applicable) to designate the type of unit.  
a) if the carrier is in a newly developed format that is not yet covered in ...
- 3.4.1.6 Units and Sets of Units with Identical Content (Core)  
If the units of the resource have identical content, add identical before the term designating the type of unit. ...
- 3.4.1.7 Number of Subunits (Core)  
Specify the number of subunits as instructed under 3.4.1.7.13 4.1.7.7 below, as applicable, if readily ascertainable and considered important for identification or selection. ...

Search results will appear in the Document Pane in ranked order by RDA Instruction Number and Title. Relevancy is based on the JSC defined mapping of RDA to AACR2. Rule Number(s) searched and all search limiters are noted in the upper right corner. Core element, if applicable are highlighted. Click the desired RDA Instruction . . .



. . .To click through to the full text of the corresponding instruction. The instruction in context of the RDA chapter in which it appears will display in the Document Pane. The instruction number and title corresponding to the hit are highlighted. Use the next hit and previous hit buttons in the icon bar to navigate through the search results list in RDA table of contents context.

## Saved Search: Store Frequent Searches Within Your Portable Profile

The screenshot shows the HomeRDAOnline.org interface. The main navigation bar includes the RDA logo and the text 'RESOURCE DESCRIPTION & ACCESS'. A user is logged in as 'Nannette Naught' from the 'Library of the Americas, Univ of X Cataloging'. The interface features a left sidebar with a tree view of RDA sections, a central search configuration area, and a right sidebar with content type selection options. The search configuration area includes a text input field for 'Carrier Type', a 'Select Text to Search ...' section with a tree view, and a 'Select Content Type to Search ...' section with several dropdown menus. A 'Save Search as ...' field is highlighted with a red circle and contains the text 'Nannette\_8\_1\_09'. A 'Search RDA' button is located at the bottom right of the search configuration area.

To save frequent searches, Advanced or AACR2 Rule Number, and take them with you wherever your career takes you, Save Your Search into your Profile, as we've done here.

# Gaining Entrance: Through Core View

The screenshot shows the RDA Online interface. At the top, the title "Gaining Entrance: Through Core View" is displayed. Below the title bar, the RDA logo and "RESOURCE DESCRIPTION & ACCESS" are visible. The user is logged in as "Nannette Naught" from the "Library of the Americas, Univ. of X, Cataloging".

The main content area is titled "3.4 Extent" and is marked as a "CORE ELEMENT". It includes a sub-section "3.4.1 Basic Instructions on R" and further sub-sections like "3.4.1.1 Scope", "3.4.1.2 Sources of Information", and "3.4.1.3 Recording Extent".

A "View Text" menu is open, showing options: "Full", "Core", "Hide Examples", "Annotations", and "Bookmarks". The "View Text" menu title and the "Core" and "Hide Examples" options are circled in red.

A left-hand navigation pane shows a tree structure of RDA elements, with "3.4 Extent" selected.

Want just the basics? You can get into RDA Online via Core View, by selecting Core from View Text on the Document Menu. The Document Pane will refresh to display just Core elements and applicable instructions as defined by the JSC. <click> Further narrow your View by selecting Hide Examples.

# Printing Instructions: Print “All of” RDA

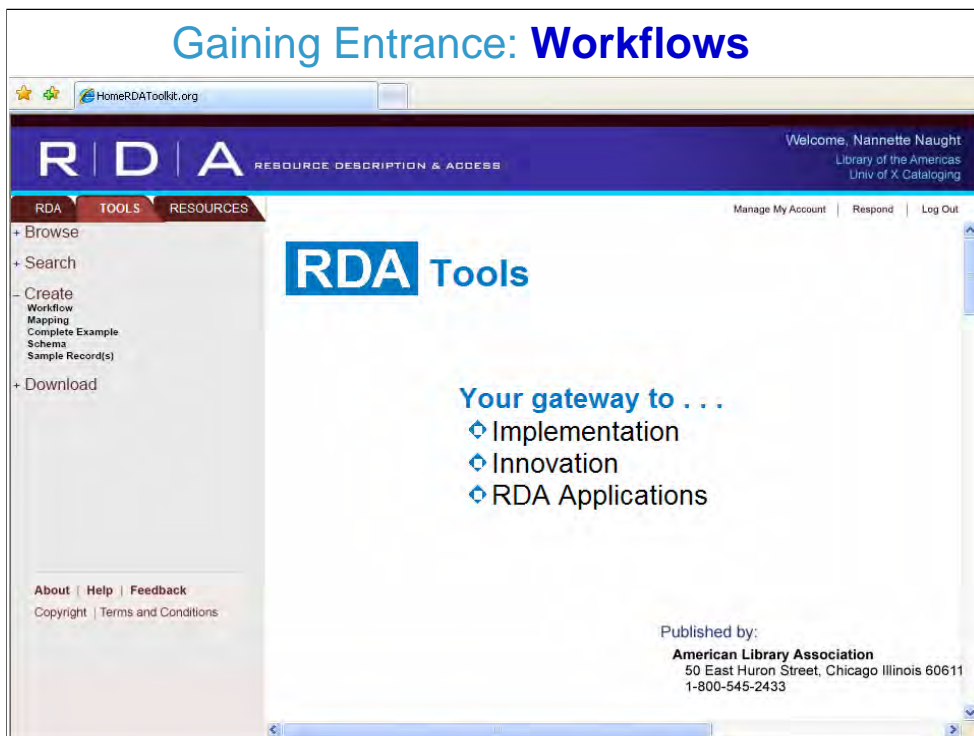
The screenshot shows the RDA Online website interface. The main header includes the RDA logo and the text 'RESOURCE DESCRIPTION & ACCESS'. A navigation menu on the left lists various RDA sections, with 'Extent' selected. The main content area displays the '3.4 Extent' section, including sub-sections like '3.4.1 Basic Instructions on Recording Extent'. A dropdown menu is open, showing 'Chapter 3' and 'RDA Online'. The 'Print Text' option in the top right navigation bar is circled in red.

To Print RDA Online, including all Chapters and Appendices, select RDA Online from Print Text on the Document Menu. Your system’s Print dialog box will launch allowing you to select a printer at your location.

# Printing: A Chapter or Other Document

The screenshot displays the RDA (Resource Description & Access) web application. On the left, a navigation pane lists document sections under 'RDA', with '3.4.1.11.2 Storage Space' selected. The main content area shows a document titled '3. DESCRIBING CARRIERS'. A 'Print' dialog box is overlaid on the document, showing printer settings for 'Auto HP Officejet Pro L7500 Series on SBN'. The 'Print Range' section has 'Pages 1 - 141' selected and circled in red. The dialog also shows a preview of the document page, which is titled '3. DESCRIBING CARRIERS'. The RDA interface in the background shows a navigation pane on the left with a tree view of document sections, and a main content area displaying the document text. The top of the RDA interface includes the logo and the text 'Welcome, Nannette Naught Library of the Americas Univ. of X. Cataloging'.

To Print the current document, select the document, shown here as Chapter 3, by name from Print Text on the Document Menu. Your system's Print dialog box will launch allowing you to select a printer at your location. There is a page count, print size, and print preview that are all shown in the Print dialog box.



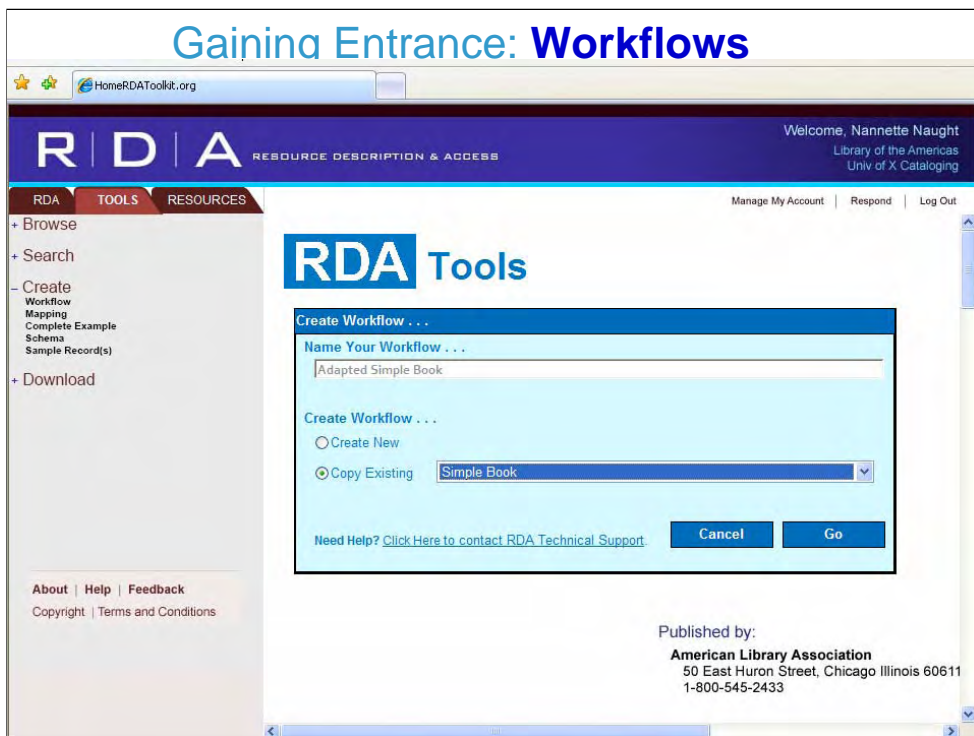
There will be another tab available, called “Tools” – under that tab we have various things for browsing, searching, creating, and downloading.

One particular feature is to create new workflows or adapt existing workflows. A workflow is a step-by-step procedure document that is linked to the RDA instructions.

Through the online workflows you can get to the specific instructions you need for cataloging.

Want to access RDA instructions via the record creation process? Adapt an existing workflow, by selecting Workflow from the Toolkit’s Create menu. The Create Workflow dialog box will appear. This is actually a “wizard-like” feature to help you create a Workflow.





Enter a name for your new workflow or select an existing workflow to adapt, as shown here with Simple Book. Click Go. The Edit workflow window displays, allowing you to edit the workflow.

## Gaining Entrance: Workflows

**Edit . . .**

- To **Edit Text**, click in text. Edit text as desired at cursor location, using your keyboard.
- To **Edit Links**, double click on the link you wish to edit. Edit link in text and/or destination in the dialog box.
- To **Edit Formatting**, select text to format and right click.

**Delete . . .**

- To **Delete Text**, select text to delete. press Delete key on your keyboard.
- To **Delete Links**, double click on the link you wish to delete. Select Delete in the dialog box.
- To **Delete Workflow**, [Click Here](#).

**Insert . . .**

- To **Insert Text**, right click in text at the desired location.
- To **Insert Links**, right click in text at the desired location.
- To **Insert Formatting**, select text to format and right click.

**Need Help? [Click Here](#)**

**WORKFLOW** Share | Save | Cancel

### SIMPLE BOOK

#### Use

Use this workflow to create a bibliographic record for a single published printed monograph.

Consult other workflows [not yet drafted] if you are creating a record for a multipart monograph, a facsimile or reproduction, an early printed book, or a book involving more than one language or script.

#### Before you begin

**Type of Description:** Confirm that what you are preparing is a comprehensive description of the book (RDA 1.5).

**Mode of Issuance, Carrier Type and Content Type:** Confirm that you have a single unit (mode of issuance, RDA 2.12 [RDA](#)) that is a volume (carrier type, RDA 3.3 [RDA](#)) of text (content type, RDA 6.11 [RDA](#)).

**Transcription:** Consult the separate workflow [Transcribing RDA](#) when transcribing information in the elements that follow.

**Information taken from outside the book:** Know the methods your agency prefers for indicating information taken from outside the book

Adapt, edit, save, and share your new workflow as desired.

The screenshot shows the HomeRDAToolkit.org website. The main header features the RDA logo (Resource Description & Access) and a welcome message for Nannette Naught, Library of the Americas, Univ of X, Cataloging. A navigation bar includes 'RDA', 'TOOLS', and 'RESOURCES' tabs. On the left sidebar, under the 'Create' section, the 'Create Workflow' link is circled in red. The main content area displays the 'WORKFLOW SIMPLE BOOK' page, which includes a 'Use' section explaining the workflow's purpose and a 'Before you begin' section with detailed instructions on description, issuance, transcription, and relationship designators.

Your new workflow will appear as a document available for browse, search, and/or further edit. You will notice there is also a tab for “Resources” which may be access to other documentation.

# Help System

HomeRDAOnline.org

Welcome, Nannette Naught  
Library of the Americas  
Univ of X Cataloging

RDA RESOURCE DESCRIPTION & ACCESS

RDA Core Element Set

As defined by the JSC, the core element set is a subset of the RDA element set that specifies the minimum set of data consistent with RDA compliance. As such, it:

- Reflects those attributes and relationships which attained a "high" rating for the user tasks defined by FRBR and FRAD and is a floor, not a ceiling. Agencies are encouraged to enhance the core element set to specify national requirements; reflect local needs; or to enable access to a specific resource. Additional elements may also be needed to differentiate one resource from other resources bearing similar information.
- Provides guidance for implementers as to the relative significance and applicability of elements.

**Download Instructions:**

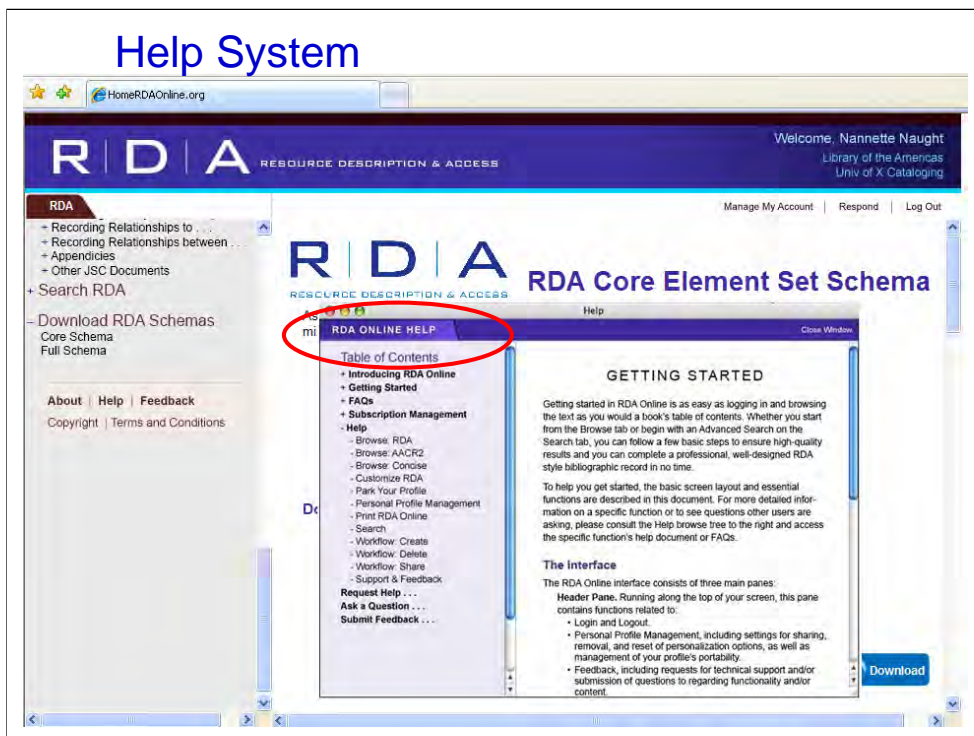
1. Click the download button.
2. When you see the "File Download" dialog, make sure "Save this program to disk." is checked, and click OK.
3. When you see the "Save As" screen - select a location to save the file, and click OK.
4. Once the file is downloaded, open it by double clicking the .zip to open it.

**Note:** The schema is downloaded as an XSD, an XML editor or XML capable system is required. If an XML editor is not available, your system will open the file in it's default text editor (e.g., Notepad).

Need Help? [Click Here](#)

Download

Help will be available for you to ask for help in using the online tool or to ask a question or submit feedback. For example, if you Request help, you will get...



Online help with its own table of contents and documentation

All of this is yet to be actually developed or tested....

## RDA Online and Local System

- Designed to allow integration with library systems
- Initially view in parallel through Web connection

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As noted in the RDA FAQ from the National Library of Australia: “The RDA online product is being developed to allow integration with library systems, with the aim of enabling a cataloguer to click through directly from their cataloguing system to the relevant RDA instruction for the data being input. However, initially it is unlikely that most library systems will be able to support this seamless integration with RDA. Rather, it is expected that the RDA online product will run in the “background” and that the cataloguer will ‘toggle’ back and forth from their integrated library system

## RDA Online/ Implementation

- ILS: Input templates for cataloging
  - Listing the elements and links to RDA guidelines (depends on the ILS vendor)
- Workflows in RDA Online
  - Step-by-step process with link to RDA guidelines
  - RDA Online wizard to create your own “workflows”
  - Share “workflows”

We hope eventually RDA Online will be connected with your integrated library system or bibliographic utility, like OCLC. The ILS or OCLC hopefully would provide direct links from a cataloging module template or input screen to the relevant RDA instructions for each data element.

As we just saw, RDA itself will have some “workflows”, that is, simple, step-by-step guides to walk the new catalogers through creating a bibliographic and authority records – there will also be a “workflow wizard” to enable you to build your own workflows that can be shared with colleagues or not as you wish. Hopefully we can share these and annotate them or edit them for local procedures.

## RDA Implementation

- What's new and where to put it
- Compare to implementing updates to AACR2 rules and MARC 21 format
  - MARC format adjustments in local systems
  - AACR2 changes
    - Adjust local documentation
    - Review procedures
    - Provide training, including reminders of differences

As we all get ready to implement RDA, I think you will find it very helpful to see what's new and where we are going to put specific elements in our MARC records – \*\*\*\*\*it's very much like the steps we took for many years with the updates to AACR2 and changes to the MARC format. You can think of the switch to RDA to be a similar "update" of the rules and the MARC format.

The updates bring adjustments to our local systems and to OCLC for the MARC changes and also adjustments to our local documentation, procedures, and training materials for the changes to the rules. The Library of Congress will be sharing all of our materials for training so you can use them – such as the examples we've started compiling.



## Suggested Changes for Systems

- New MARC fields for RDA elements
  - 336, 337, 338: Content type, Media type, Carrier type
  - 502 subfields for dissertations for academic degree, granting institution/faculty, year degree granted, dissertation number, etc.
  - Added relator terms (RDA Appendix I – “roles”)
  - Authority format fields for dates, places, etc., for names

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As part of planning for the implementation of RDA, the National Library of Australia has posted a set of FAQs (frequently asked questions) related to system changes with RDA, including MARC format changes.

As I mentioned before we are working with MARBI to be sure MARC has places to put some of the new elements that RDA includes, such as the 336 content type, 337 media type, and 338 carrier type, that I mentioned earlier. Some other examples are the addition of subfields for the 502 dissertation note to specifically identify the elements of the degree, the name of the granting institution or faculty, the year the degree was granted, the dissertation number, etc. – so machines can use that information for indexing or displays rather than having it as we do now in a textual note. We also are adding more relator terms to the MARC lists and specifying fields in the authority records for specific dates, places, and so on that relate to names. You will need to see if your integrated library system vendor provides such updates or you need to do them locally.

## More system changes

- Input/verification functions (import/export)
- Indexes for new data elements
- Templates and macros

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Some other system changes that vendors or you in your local systems will want to make are related to the import and export of records to accommodate these MARC changes – some of which will involve the input or validation functions in your systems or the indexes you may want to add for the new data elements.

You may also be able to update your cataloging templates and set up some macros for the commonly used values for specific elements, like for the content types, media types, and carrier types.

## “Legacy” records (now in systems)

- Existing records generally will not need changing (exceptions: ‘global updating’ for Bible, Department)
- However, existing AACR2 records lack new MARC data elements and the FRBR grouping and display advantages of RDA

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So what do you need to do about records already in your systems? Generally you will not need to change them at all. In some specific cases where RDA differs from AACR2, you may want to do a one-time global update to fix headings for the Bible and to now spell out the formerly abbreviated word “Department” in corporate names.

However, if you choose not to upgrade the existing records you will diminish the future ability to use the new elements for the FRBR groupings and display advantages that RDA offers. It may be that adding that information can partially be assisted through machine algorithms and through collaborative projects to share the workload.

## RDA Testing / Implementation

2009 or early 2010: First Release

+9-10 months: LC, NAL, NLM testing

Training materials

Documentation on system changes

(MARC Format, indexing, etc.)

2010: Implementation (BL, LAC, NLA, etc.)

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RDA is being designed as a Web tool – that is it will be viewed on your computer. We are not yet certain when that online version will be available.

The publishers have given a tentative first release date of November or December 2009. Whatever date it is, that will be the start date for testing RDA. The three national libraries in the United States: Library of Congress, the National Agriculture Library, and the National Library of Medicine are jointly collaborating to test RDA and share our findings on a public Web site this year before making a decision on implementation.

The national libraries in Canada, Australia, and the United Kingdom have also said they will test RDA but their tests will be part of their training their staff in order to better implement RDA in 2010. All of us will be sharing our training materials and documentation.

## US National Libraries RDA Test

- Library of Congress, National Agriculture Library, National Library of Medicine
- Approximately 20 additional participating organizations or individuals
  - Over 90 applications: all types of libraries, archives, museums, bookjobbers, ILS vendors, systems designers, etc.
  - <http://www.loc.gov/bibliographic-future/rda/>

In response to concerns about RDA raised by the Library of Congress Working Group on the Future of Bibliographic Control, the three U.S. national libraries--the Library of Congress (LC), the National Library of Medicine (NLM) and the National Agricultural Library (NAL)--made a commitment to the further development and completion of RDA. The three libraries agreed to make a joint decision on whether or not to implement RDA, based on the results of a test of both RDA and the Web product. The goal of the test is to assure the operational, technical, and economic feasibility of RDA. Testers will include the three national libraries and the broader U.S. library community.

We will include about 20 additional participating organizations or individuals that will be selected from among the over 90 applications – we want to be sure to have representatives from all types of libraries, archives, museums, bookjobbers, ILS vendors, systems designers, and so on – There is lots more information at the web site shown here.

## Timeline – US National Libraries RDA Test

- RDA Online release
- + 3 months (1<sup>st</sup> quarter)
  - Train the testers, setup RDA Online with “decisions”, and practice using RDA
- + 3 months (2<sup>nd</sup> quarter)
  - Test and report results
- + 3-4 months (3<sup>rd</sup> quarter)
  - Analyze test and draft report
  - Decide (US National Libraries’ Administrators make decision)
  - Release public report of test results with decision

The US test will begin whenever the RDA Online product is available – after all the alpha and beta tests and usability tests are completed – we now anticipate that will be around January 2010.

For the first 3 months we will be training the testers and getting the testbed setup in our integrated library systems, and giving the testers time to practice using RDA.

Then the second 3 months will be for the actual test. We have a preliminary methodology but as I mentioned, it will be developed further in collaboration with all the partners.

We anticipate that the final 3-4 months will be used to analyze the results of the test, to write up a draft report with recommendations to our administrators, and time for the administrators to deliberate and make a decision. We also intend to share suggestions for improvements with the RDA developers. There will be a public report of the results, recommendations, and decisions, once that process is completed.

## Methodology

- Base set of approximately 25 records
  - Catalog in existing systems as
    - RDA
    - Your current cataloging rules
  - Report results to a Survey instrument
  - Submit resulting records for analysis
- Additional records “normally” catalog
  - Share comments to Survey instrument for analysis

The basic methodology so far envisions testing about 25 records for different types of resources using existing systems following current rules and then following RDA. There will be a survey tool, probably SurveyMonkey, to capture the process and subjective and objective evaluations.

Participants will also be encouraged to catalog additional records that they would in their normal cataloging operations and to share their records and comments about using RDA through the same survey instrument.

## US National Libraries RDA Test

- Test results shared widely
- Test in existing library systems
  - Although probably greatest benefits once systems change
  - System developers encouraged to explore RDA in future systems
- All data freely available for all to use
- Beyond formal testers, other encouraged to follow the methodology and share results

Our intention is to share all the results widely and make all the data freely available for everyone to use if they wish – even beyond the formal testers.

Although this test will be done in existing library systems, we are encouraging systems developers to explore using RDA in future systems and to give us feedback on that, too. We recognize that probably the greatest benefits from RDA will come once our systems and communication formats evolve.



The image shows a slide with a blue header bar. In the top right corner of the header is the RDA logo, which consists of the letters 'R', 'D', and 'A' in a bold, blue, sans-serif font, separated by vertical bars. Below the header bar, the URL <http://www.collectionscanada.gc.ca/jsc/rda.html> is displayed in a black, sans-serif font. Below the URL is a larger version of the RDA logo, with the letters 'R', 'D', and 'A' in a bold, blue, sans-serif font, separated by vertical bars. Below the logo is the text 'RESOURCE DESCRIPTION & ACCESS' in a smaller, blue, sans-serif font. In the bottom right corner of the slide, the number '41' is displayed in a small, black, sans-serif font.

<http://www.collectionscanada.gc.ca/jsc/rda.html>

**R | D | A**

RESOURCE DESCRIPTION & ACCESS

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You can stay informed through the JSC Web site and the LC RDA Test website and through collaborations with your colleagues as you together prepare for this new cataloging code and the Library of Congress will provide training materials and already have started a series of background Webcasts (FRBR, Cataloging Principles, etc.).

I think we're at an exciting time for the development of new information systems, more global in nature, that can make cataloging easier and make the results of cataloging much more flexible and useful to our users. RDA is pointing us in the direction towards that future to better serve our users.


## Contact Information

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+1 (202) 707-4714

Here's my contact information and I'd be pleased to help answer your questions or help in whatever way I can and we launch into this new venture together. Let's hope the systems vendors also make great progress to we have systems to realize the full benefits of this new cataloging code. Thank you for your attention!



**R | D | A**  
RESEARCH DESCRIPTION & ABSTRACT

Thank you!

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Thank you for your attention.

Any questions?