RDA 3R Project – Stabilization Phase
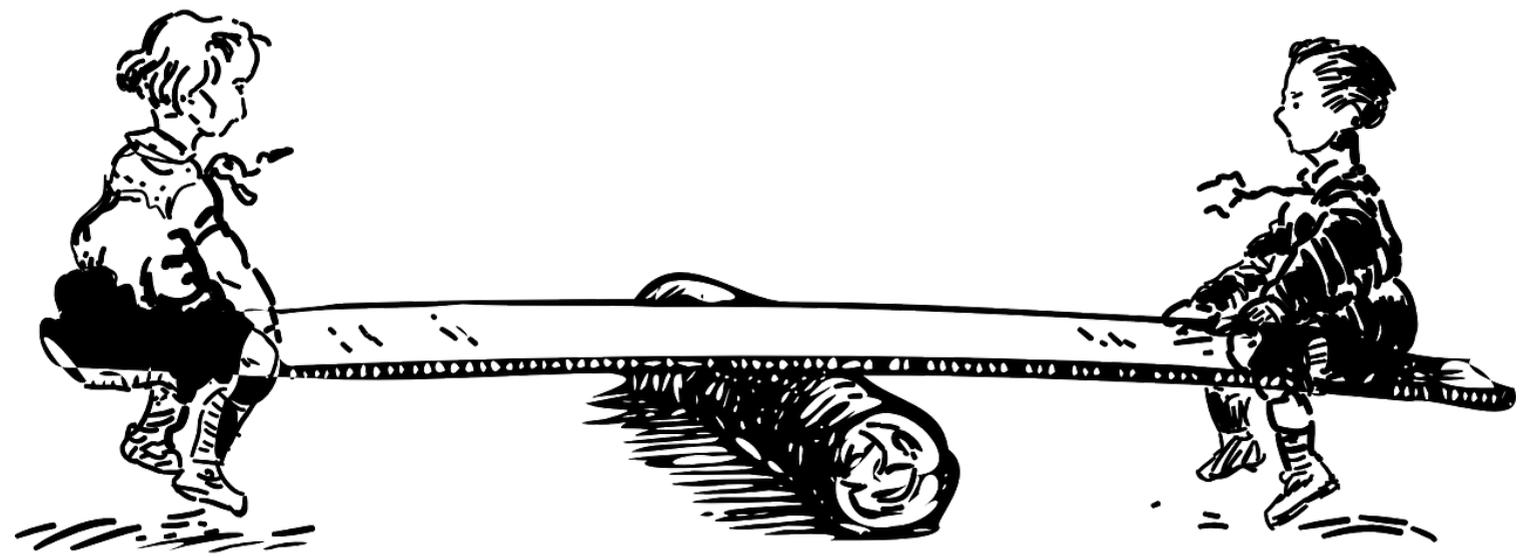
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   Head, Original & Special Collections Cataloging, University of Maryland

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What's Stabilization?

New Phase of 3R Project

- RDA beta site no longer under constant revision
  - English language text stable for
    - Value vocabularies
    - Element sets
    - Entity and element chapters
    - Guidance and resource chapters
  - Will serve as baseline text for
    - Translators
    - Policy statement writers
    - Application profile developers
    - Writers of supplementary materials
    - RDA Examples Editor

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Stable, but not unchanging

- May still modify RDA in the following categories
  - Minor editorial changes
    - Correction of typos and obvious errors
    - Edits to improve consistency
    - Better wording to support translations
  - Additional changes, if
    - They will not have a significant impact on translators, policy statement writers, etc.
    - They do not affect the outcome of applying the instructions
  - Add/revise examples
  - Improvements/additions to the Toolkit interface
- Will start tracking and publicizing text changes

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Stablization ≠ Official

- This phase ***does not*** start the countdown clock on the original Toolkit

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Becoming Official - Next Steps

- Translations (goal: Dec. 2019)
  - Key translations complete: Finnish, French, German, and Spanish
  - Other established translations in progress

- Policy Statements completed and published on the site (goal: Feb. 2020)
  - Five of the current eight need to be functional

- RSC and RDA Board must unanimously agree that the 3R Project is complete
  - Then one year countdown clock starts on the original Toolkit

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Orientation Project

- Starting an educational program for all RDA users
  - Orientation, not training
    - o Navigation, features, and functionality of the Toolkit interface
    - o Introduction to core concepts
    - o Review of new terminology and practices
    - o Influence of IFLA-LRM on RDA development
    - o Approaches to teaching the new Toolkit
  - Kickoff webinar (free): May 10
  - Other (paid) webinars on specific topics in the summer
  - Planning e-courses for more complex topics

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Explore the RDA Toolkit BETA site

RDA | TOOLS | RESOURCES

RDA Quick Search | Account ID | Password

About | Help | Feedback

GET STARTED WITH THE RDA TOOLKIT!

It's as easy as . . .

Log in to Your Subscription

If your institution's name is visible in the upper right corner of the window, then you're already logged into your subscription. If not, enter your subscription Account ID and Password in the login boxes.

Create a User Profile

Next, create a User Profile by clicking the "Create" button. If you already have a User Profile, enter your Profile Name and Password in the login boxes.

Browse or Search

On the RDA tab to the left, click the plus sign to expand and browse the RDA table of contents. On the Tools tab you can browse the RDA Element Set as well as workflows and maps. Search RDA only from the "RDA Quick Search" box above, or use Advanced Search to search RDA and other documents.

Need Assistance?

- Click the "Help" link in the lower left corner to visit our Quick Start Guide
- Request Support
- For an overview of RDA: Resource Description and Access and the RDA Toolkit—including how to create a User Profile, to browse and search, to use workflows and mappings, and to leverage your existing knowledge of AACR2 and MARC as an entry into RDA cataloging —sign up for a free RDA Toolkit Essentials webinar or watch a video of past webinars.

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What's Changed from the Original RDA?
New Terminology, Concepts, Etc.

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Old Concepts, New Terms

- Vocabulary Encoding Scheme
  - Controlled values for elements
    - Some within RDA, available through relevant element chapters as well as the 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

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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, intended audience, date, duration, etc.
    - For one work, different attributes can come from different expressions
- Diachronic works
  - Issued over time
    - Can be monographs, serials, or integrating resources
    - Can be aggregates (compilations)
      or single works (a serialized novel)

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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 title and responsibility 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")

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New Concepts

- Nomen
  - Associates a combination of signs or symbols (an appellation) with an RDA entity
  - Identical strings may refer to different entities
  - One entity may have many nomen

- 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 and updating for consistency
    - Principles applied to place instructions in the appropriate elements - 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

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New Concepts

- Domain and range
  - Available under **👁 Element Reference** for each element
    - o Domain: Entity that is described by an element
    - o Range: Entity that is the value of a relationship element
      - Example: "date of capture"
        Domain: Expression
        Range: Timespan
  - Attributes do not have range
    - o Example "illustrative content"

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New Concepts

- Alternative labels
    - Available under **Element Reference** for each element
    - Includes
        - Verbalized terms, which help in understanding the direction of relationship elements
            - Element name: employer
            - Alternative label: has employer
        - "Retired" labels from the original Toolkit where applicable
            - "Earlier title proper" and "Later title proper" have been subsumed by "title proper"
                - These were valid titles proper at a given point in time

New Concepts

- Condition/option boxes
  - Replace
    - o Optional addition
    - o Optional omission
    - o Exception
    - o 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

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Single Condition/Option

- From "authorized access point for work"

Work of uncertain or unknown origin

CONDITION

A work is created by an unknown or unnamed agent.

OPTION

Record a value that is based on Work: **preferred title of work**.

👁 Example

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Single Condition/ Multiple Options

Names of person in more than one language

CONDITION

A value of a name appears in more than one language in manifestations.

OPTION

Record a value that is in a language that appears most frequently in manifestations.

OPTION

Record a value that appears most frequently in reference sources in a language that is preferred by an agent who creates the metadata.

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Multiple Conditions/ Single Option

Preferred titles of works that are created after 1500

CONDITION

A value of Work: **date of work** is after 1500.

A value of Manifestation: **title proper** of manifestations that embody expressions in an original language of a work appears frequently in sources of information.

OPTION

Record a value of Manifestation: **title proper** in an original language.

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Multiple Conditions/ Multiple Options

Names of family consisting of a given name or a word or phrase

CONDITION

A name of a family consists of a value of Person: given name.

A value of a name appears in more than one language in manifestations.

OPTION

Record a value that appears most frequently in reference sources in a language that is preferred by an agent who creates the metadata.

OPTION

In case of doubt, record a value in a native or adopted language of a person, or the Latin form.

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Option, No Conditions

- From "title proper"

Recording an unstructured description

OPTION

Record a value of Manifestation: **title of manifestation** .

OPTION

Record a Manifestation: **note on manifestation** on the source or basis for a value of a title proper.

Enhanced Concepts

- Relationship designators become relationship elements
  - Inherently reciprocal – inverses formally declared and have their own element pages
    - Jeff Bezos *is chief executive of* Amazon
    - Amazon *has chief executive* Jeff Bezos
  - Need to keep Domain and Range in mind
- Transcription guidelines
  - "Take what you see" – very literal
  - Modified transcription – what catalogers do now: adjust capitalization, add diacritics, etc.

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Enhanced Concepts

- Aggregates
  - New approach, grounded in LRM

- 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

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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
      - Interviewer agent of work
      - Interviewer collective agent of work
      - Interviewer corporate body of work
      - Interviewer family of work
      - Interviewer person of work

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Interface Enhancement

- Actionable breadcrumbs added to assist with navigation
  - Available for Element and Guidance Chapters

Resource description > Describing an expression

Describing an expression

Work > ISSN

ISSN

Expression > supplementary content

supplementary content

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What's Changed?
Old Concepts, Left Behind

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What's Missing?

- Instruction numbers
  - Instead, "citation numbering" coming by June
    - 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

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What's Changed?
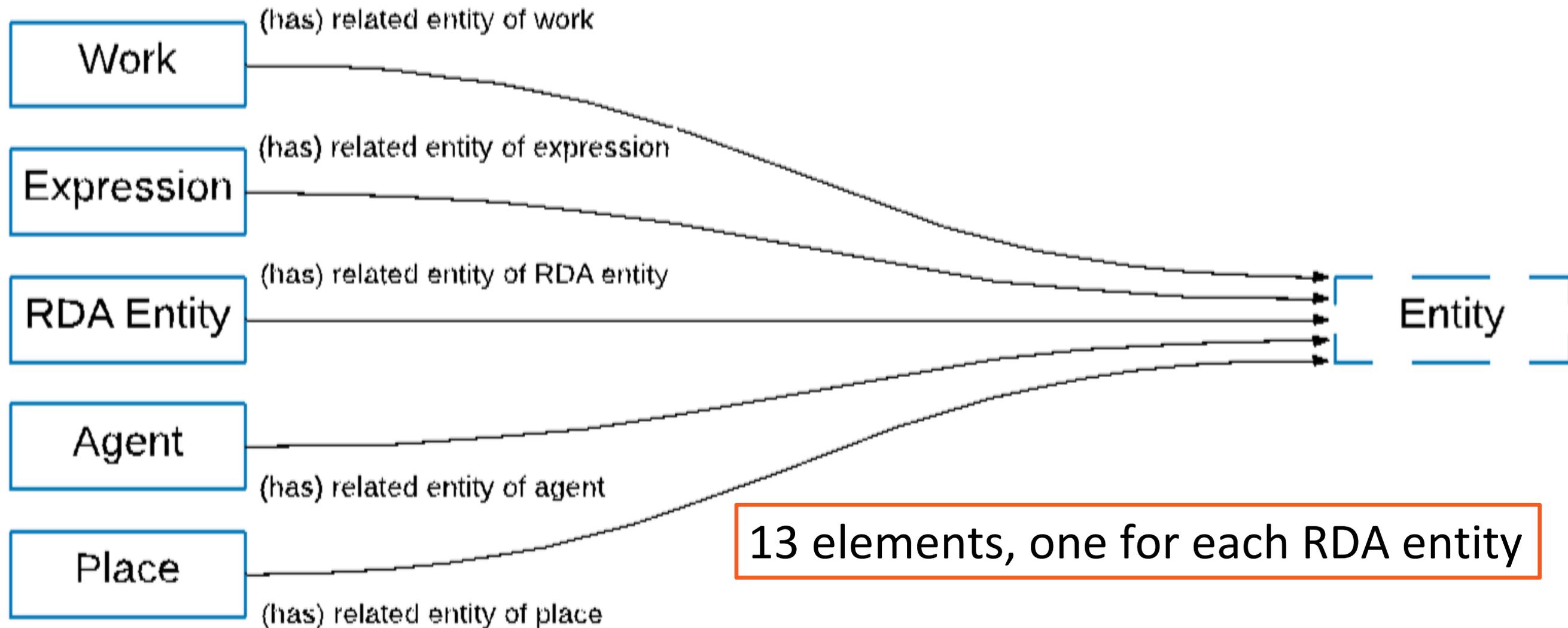# Fictitious Entities

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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

RDA Entity —— (has) related entity of RDA entity ——▶ Entity

No assumptions about Entity

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Ways to Link Outside of RDA

Work — (has) related entity of work

Expression — (has) related entity of expression

RDA Entity — (has) related entity of RDA entity

Agent — (has) related entity of agent

Place — (has) related entity of place

Entity

13 elements, one for each RDA entity

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What's the Same (or Similar)?

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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 file type* [RDA 3.19.2.4] present in Beta Toolkit, but…
    - Better to: record this as an *unstructured description* of *file type*
- With more options about how to record data
  - Can keep recording data the same way
  - Can try something different that works better for your users

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Parallel Title Proper - Excerpt

If:
    an original title is in a language different from that of a title proper
    and
    the title is presented as an equivalent to a title proper
then:
    record it as a parallel title proper.

Original Toolkit

CONDITION

An original title is in a language different than that of a title proper.

An original title is presented as an equivalent parallel title proper.

Beta Toolkit

OPTION

Record the original title as a *parallel title proper*.

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Names as Titles - Excerpt

Names of Agents `2015/04`

If a title consists solely of the name of an agent, record the name as the title.

Original Toolkit

Titles consisting of a name of an agent

CONDITION

A value of Manifestation **manifestation title and responsibility statement** ⊡ consists only of a name of an agent.

Beta Toolkit

OPTION

Record the name as a title.

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Some Glossary Definitions

- 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

- Original Toolkit**: form of work**

  - A class or genre to which a work belongs.

- Beta Toolkit: **category of work**

  - A type to which a work belongs.
    Includes a class or genre.
    Use for: form of work

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MARC Mappings

337 ☑		**Media type**		
337 ☑	a with subfield $2 = "rdamedia"	Media type term	3.2 RDA	Media Type
337 ☑	b with subfield $2 = "rdamedia"	Media type code	3.2 RDA	Media Type

Original Toolkit

media type

Definition and Scope

A categorization reflecting the general type of intermediation device required to view, play, run, etc., the content of a manifestation.

Beta Toolkit

👁 Element Reference

...

- **MARC 21 Bibliographic**
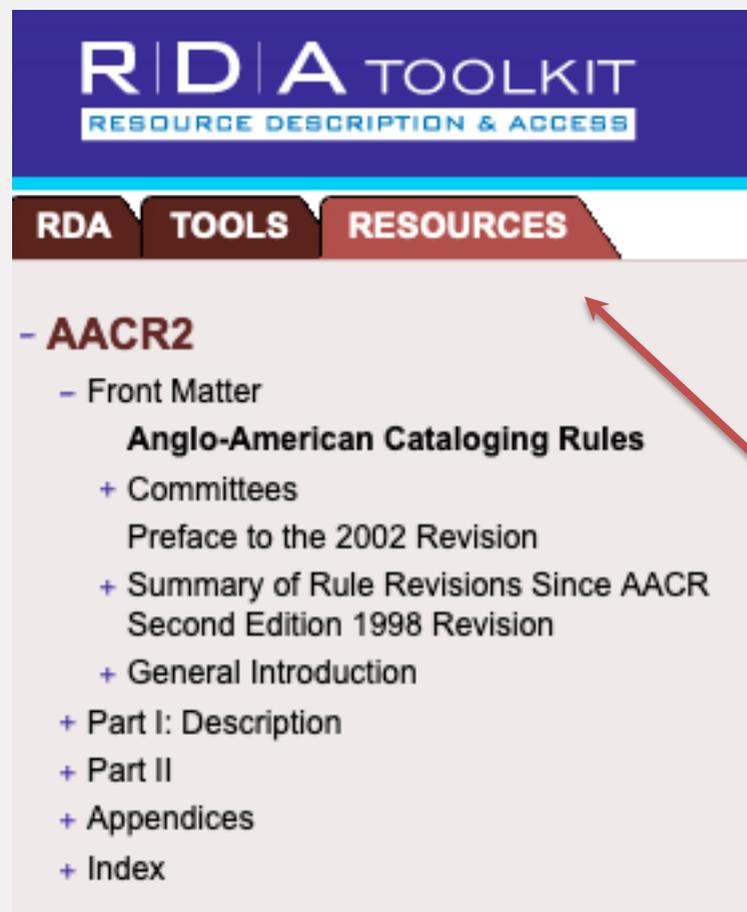
  MARC 21 Bibliographic 337 ** $a [structured description]

  MARC 21 Bibliographic 337 ** $b [structured description]

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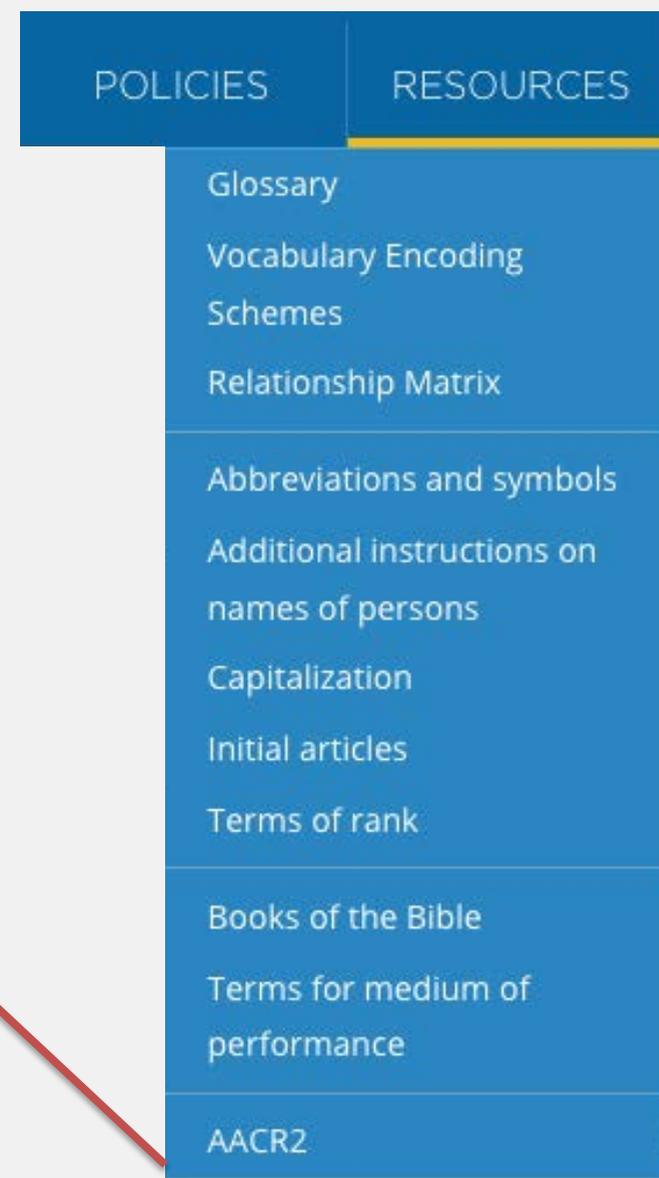Resource Description & Access

Access to AACR2

Original Toolkit

Beta Toolkit

Spotlight on **Application Profiles**

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What is an Application Profile (AP)?

- Specifies the entities, elements, and vocabulary encoding schemes to be used
  - May include
    - Minimum and maximum number of times an element may be used
      - This determines if the element is mandatory (minimum # = 1), optional (minimum # = 0), or repeatable (maximum # > 1)
    - Preferred recording method
    - Elements used to relate two specified entities
    - String encoding schemes to be used for structured descriptions
- BSR and CSR are examples of application profiles

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Purpose of APs

- Helps catalogers understand which of the elements to use, and which ones not to, for example:
  - Do not use "details of illustrative content"
  - Instead, use "illustrative content" – Unstructured description
- Could serve as a data input form
- Data validation
  - Mandatory, optional, repeatable elements
- Data extraction/ingest
  - Identify data from other sources needed in (and compatible with) your application
- Elaborated by Policy statements

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What Guidance is in RDA?

- Guidance chapters
  - Coherent description of an information resource
    - Describes how WEMI entities are related to each other
    - These are the primary relationship elements
    - Includes cardinality restrictions
      - For example, a manifestation must embody at least one expression
  - Minimum description of a resource entity
    - Sets out the appellation elements associated with WEMI entities, and what is required
      - For example, a work must have at least one of the appellation elements, and an association with either an expression or a manifestation (which also have at least one appellation element)

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What Guidance is in RDA?

- Guidance chapters
  - Effective description
    - o Must conform to
      - Coherent description of an information resource
      - Minimum description of a resource entity
    - o Add other general or specialized elements that are deemed useful for identification or access, following guidance in
      - Application profiles
      - Policy statements
      - Cataloger's judgment
      - Availability of information

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AP Management

- Developed/maintained by communities or institutions
  - Individual catalogers will use APs, not create them
- Can be published within the Toolkit (behind the paywall)
  - Expect a general AP to be included in the beta Toolkit before it becomes official
    - Can serve as a basis for community APs
  - Toolkit "Documents" can be created/shared and could contain more local APs
- Can be published outside the Toolkit (outside the paywall)
  - Up to the community/institution

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For More Information

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PCC OpCo – May 2, 2019

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RDA Resources

- RDA Steering Committee website:

  http://www.rda-rsc.org/

  - 2019 Presentations page: http://www.rda-rsc.org/node/589
  - 3R Project Frequently Asked Questions: http://rda-rsc.org/node/551

- 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

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Questions?

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

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