RDA Updates

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Resource Description & Access

Setting the Stage

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New RDA Toolkit

- Beta site became "official RDA" on December 15, 2020
  - Result of the RDA 3R Project (RDA Restructure and Redesign), 2016-2020
    - Needed to align with new IFLA Library Reference Model (LRM)
    - Offered more flexibility in choosing how to record an element
    - Took a new approach to relationship designators
    - Revised RDA to better align with linked data applications
    - Made changes to promote greater international adoption
    - Improved the Toolkit interface
      - Achieved WCAG 2.0 accessibility rating of AA
    - Restructured underlying data to support improved editorial work processes, including creation of translations
  - Original Toolkit remains available for some time to come

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Official RDA

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

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IFLA LRM

- Consolidation and update of RDA's original underlying functional requirements models (FRBR, FRAD, and FRSAD)
- High level conceptual reference model, using an entity-relationship modeling framework
  - Addresses library data relating to the universe of discourse
    - Administrative metadata is out of scope
  - Makes no assumptions about how data might be stored in a given system
  - Driven by User Tasks: Find, Identify, Select, Obtain, Explore
- Aligned with the CIDOC Conceptual Reference Model (CRM)
- Official RDA is an implementation of LRM
  - With some expansions that retain the basic structure of the elements and the relationships among them

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Changes to RDA Due to LRM

- New Entities added
  - *RDA entity* – top level
    - Used as a refinement of LRM's *Res*, which was not implemented
  - *Agent, Collective agent, Nomen, Place, Timespan*
- No fictional values for entities
  - *Person* [a change from original RDA], *Place, Timespan*
  - Fictional persons, places, and timespans are valid concepts, but they are not occurrences of these entities
- Increase in relationship elements; fewer attribute elements
- New attributes
  - Representative expression elements
  - Manifestation statement elements

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Orientation to the New Toolkit

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No More "Core Elements"

- Replaced by information in guidance chapters
  - Coherent description of an information resource (07.04.34.92)
    - Formed by relating the descriptions of its Work, Expression, Manifestation, and Item
  - Minimum description of a resource entity (77.58.11.11)
    - Record a value for at least one appellation element of the entity
  - Effective description of an information resource (45.52.73.18)
    - Add other entities and/or elements deemed useful for identification or access

- So many options, so little guidance in RDA instructions – What's a cataloger to do?
  - Use an application profile, which specifies which entities and elements are required, optional, repeatable, etc.

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Entities

ENTITIES	GUIDANCE	POLICIES	RESOURCES	Exact Title ⌄	Search 🔍

RDA Entity

Work

Expression

Manifestation

Item

Agent

Person

Collective Agent

Corporate Body

Family

Nomen

Place

Timespan

- RDA Definition: An abstract class of key conceptual objects in the universe of human discourse that is a focus of interest to users of RDA metadata in a system for resource discovery

- 13 established in RDA

  - Retained *Corporate Body* and *Family* as refinements of LRM's *Collective Agent*

- Ability to search or browse by attribute or relationship elements at the bottom of each entity page

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Entities

Person – attribute elements. (61.08.12.74)

Elements

○ All ◉ Attribute Elements ○ | Relationship Elements ⌄ |

| Find Element |

address of person ⇥
biographical information ⇥
category of person ⇥
field of activity of person ⇥
gender ⇥
language of person ⇥
note on person ⇥
profession or occupation ⇥
related entity of person ⇥
term of rank, honour, or office ⇥

Person – relationship elements to Person

Elements

○ All ○ Attribute Elements ◉ | Person ⌄ |

| Find Element |

assistant ⇥
assistant to ⇥
colleague ⇥
coworker ⇥
fellow student ⇥
friend ⇥
partner ⇥
related person of person ⇥
student ⇥
teacher ⇥

Elements

- RDA definition: A specific aspect, characteristic, attribute, or relationship used to describe an RDA entity

- All elements are unique and can only describe one entity

- No direct navigation – why?

  - Over 3,000 elements!

  - Explicitly declared for each type of agent as applicable

    - *Author agent, Author collective agent, Author corporate body, Author family, Author person*

  - Some hierarchical relationships

    - *Author person*

      - *Librettist person, Lyricist person, Rapporteur person, Screenwriter person*

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Elements

- Two ways to find an element – example: *title of series*
    - Approach via entities – *Manifestation*
        - Go to bottom of that page ([76.92.40.70](76.92.40.70)) & start typing

Elements

⦿ All   ○ Attribute Elements   ○ | Relationship Elements ⌄ |

| title of| |

parallel title of series →⊡

title of manifestation →⊡

title of series →⊡

variant title of manifestation →⊡

    - Search directly

| Exact Title ⌄ | title of series | 🔍 |

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Elements – Two Kinds

Relationship element

- An element that relates two RDA entities
- 75% of all RDA elements!
- Transformation of relationship designators
  - Original RDA: terms in Appendices I, J, K, & M
  - Current RDA: full-blown elements
- Can occur between any entities
  - *Work* to *Manifestation*
  - *Person* to *Timespan*
- Always have inverses, with predictable naming conventions
  - *Source consulted / Source consulted of*
  - *Title of work / Title of work of*

Attribute element

- An element that is an inherent or externally imputed characteristic of an RDA entity
  - *Carrier type*
  - *Language of person*
  - *Number of conference*
- Many original RDA attributes became relationship elements
  - *Date of birth* (person to timespan)
  - *Place of conference* (corp. body to place)
  - *ISSN* (work to nomen)
  - *Given name* (person to nomen)

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Element Page Layout

title proper

Definition and Scope

A title of manifestation that is selected for preference in a specific application or context.

An alternative title is treated as part of a title proper.

👁 Element Reference

IRI
http://rdaregistry.info/Elements/m/P30156

Domain
Manifestation

Range
Nomen

Alternate labels

has title proper

preferred title of manifestation

earlier title proper

later title proper

←Unique label

←Unique definition

←Unique IRI

←Domain

←Range (if applicable)

←Alternate labels
verbalized labels (always)
original RDA labels (if applicable)

Element Page Layout

Prerecording

A *title proper* does not include:

- Manifestation: other title information ⇥
- Manifestation: parallel other title information ⇥

A file name or data set name is not considered a *title proper* unless it is the only title appearing in the manifestation.

Recording

Record this element as a value of a Nomen: nomen string ⇥ or as an instance of a Nomen ⇥.

For a variation in a value of this element that is associated with a part or iteration of a manifestation that embodies a *diachronic work*, see Guidance: Resource description. Describing a manifestation. Describing a manifestation of a diachronic work ⇥.

Recording an unstructured description

← Mappings to other standards

← Background information (21.93.72.57)

← General information

← Specific recording methods

Element Page Layout

View in Context Example

👁 Example

Related Elements

For broader elements, see

RDA Entity: preferred name of RDA entity →⊟

Manifestation: title of manifestation →⊟

For narrower elements, see

Manifestation: parallel title proper →⊟

For the inverse of this element, see Nomen: title proper of →⊟.

Document Date: 2019/04/30
Document: https://access.rdatoolkit.org/en-US_ala-4b9291c5-f525-37fd-b661-c469e763ce8a

←Full example (when available) (82.54.05.97)

←List of related elements

←Broader

←Narrower

←Inverse

←Page last updated date & page URL

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Element Reference

place of capture 1

Definition and Scope 4

A place that is associated with recording, filming, etc., the content of an expression.

👁 Element Reference

IRI

http://rdaregistry.info/Elements/e/P20218

Domain

Expression → 2

Range

Place → 3

Alternate labels

has place of capture

+ **IFLA LRM**

+ **MARC 21 Bibliographic**

- How to read this information
  - The element "*place of capture*" 1
  - Relates an "*Expression*" 2
  - To a "*Place*" 3
  - Which is "A place that is associated with recording, filming, etc., the content of an expression." 4

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Element Labels

- Designed to be unique, predictable, and capable of machine derivation
  - This supports implementation scenarios which require labels to identify the nature of the relationship

- Not intended for end-user display
  - Instead, can programmatically replace element label with a more user friendly one
    - However, this should be a community decision

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Condition / Option Boxes

- The new approach to alternatives, exceptions, optional omissions, optional additions

- Option boxes may exist alone, or in a sequence
    - Policy statements can guide which one(s) to apply

- Condition boxes are always paired with at least one option box
    - Options may or may not be exclusive
    - Again, policy statements can provide guidance

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Example: Option boxes

From **Content type** ([35.21.66.74](#))

Recording an unstructured description

> **OPTION**
>
> Record an uncontrolled term or a term that is transcribed from a *source of information*.

> **OPTION**
>
> Record details or other unstructured information.

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Example: Condition/Option boxes

From ***Media type*** ([96.43.33.01](#))

Recording

CONDITION

A manifestation consists of two or more media types.

OPTION

Record all of the media types.

OPTION

Record only the predominant media type.

OPTION

Record only the media types that apply to the most substantial content of the manifestation.

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Equivalent in Original RDA

3.2.1.3   Recording Media Type

Record a media type using one or more of the terms from the following list.

Alternative

If the manifestation being described consists of more than one media type, record only:

    a)   the media type that applies to the predominant part of the manifestation (if there is a predominant part)

      or

    b)   the media types that apply to the most substantial parts of the manifestation (including the predominant part, if there is one).

Use one or more of the terms from the following list, as appropriate.

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Guidance

ENTITIES   GUIDANCE   POLICIES   RESOURCES   Exact Title ⌄   Search 🔍

Introduction to RDA

Aggregates

Application profiles

Content and carrier

Data provenance

Diachronic works

Entity boundaries

Fictitious and non-human appellations

Manifestation statements

Nomens and appellations

RDA implementation scenarios

Recording methods

Representative expressions

Resource description

Terminology

Transcription guidelines

User tasks

Well-formed RDA

- Chapters explain many concepts
  - Many of the concepts aren't as new as they may seem
  - Some have sub-sections

Transcription guidelines	Guidelines on basic transcription
User tasks	Guidelines on normalized transcription
Well-formed RDA	

- Frequently referred to from specific instructions:

  For general guidance on identifiers, see Guidance: Recording methods. **Recording an identifier →≣**.

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New Concepts in RDA
A Quick Overview

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Vocabulary Encoding Scheme

- RDA definition: A named structured list of representations of controlled values for elements

- Vocabulary Encoding Schemes (VESs) include:

  - RDA lists of terms (example: RDA content type)

  - ISO code lists (example: ISO 639-2 language code list)

  - Standard terminology from sources outside RDA (example: Terms for medium of performance)

  - Authority control systems (example: name authority records, LCGFT)

- They do not include simple keyword indexes

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Manifestation Statement

- RDA definition: A statement appearing in a manifestation and deemed to be significant for users to understand how the manifestation represents itself

- Designed for
  - Machine transcription
  - Simplified decision making (less parsing required)

- Broad categories of information
  - 13 sub-elements, including
    - *manifestation publication statement*
    - *manifestation title and responsibility statement*

- Not required – can use the more granular elements, like
  - *title proper*
  - *statement of responsibility relating to title proper*

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Data Provenance – Definition

- Provides information about the metadata recorded in an element or set of elements, which can be used to infer the context and quality of the metadata ([81.91.96.76](81.91.96.76))

- The metadata being described by data provenance are treated as a *metadata work* that consists of either a *metadata statement* or a *metadata description set*

Data Provenance – Use

- Includes the ability to identify the
  - Content standard
  - Language and/or script of the description
  - Transcription standard
  - Who recorded the metadata
  - Who published the metadata
  - The source of the metadata
    - Source of title: cover, caption, spine, colophon, etc.
    - Source consulted
  - Date the metadata was created
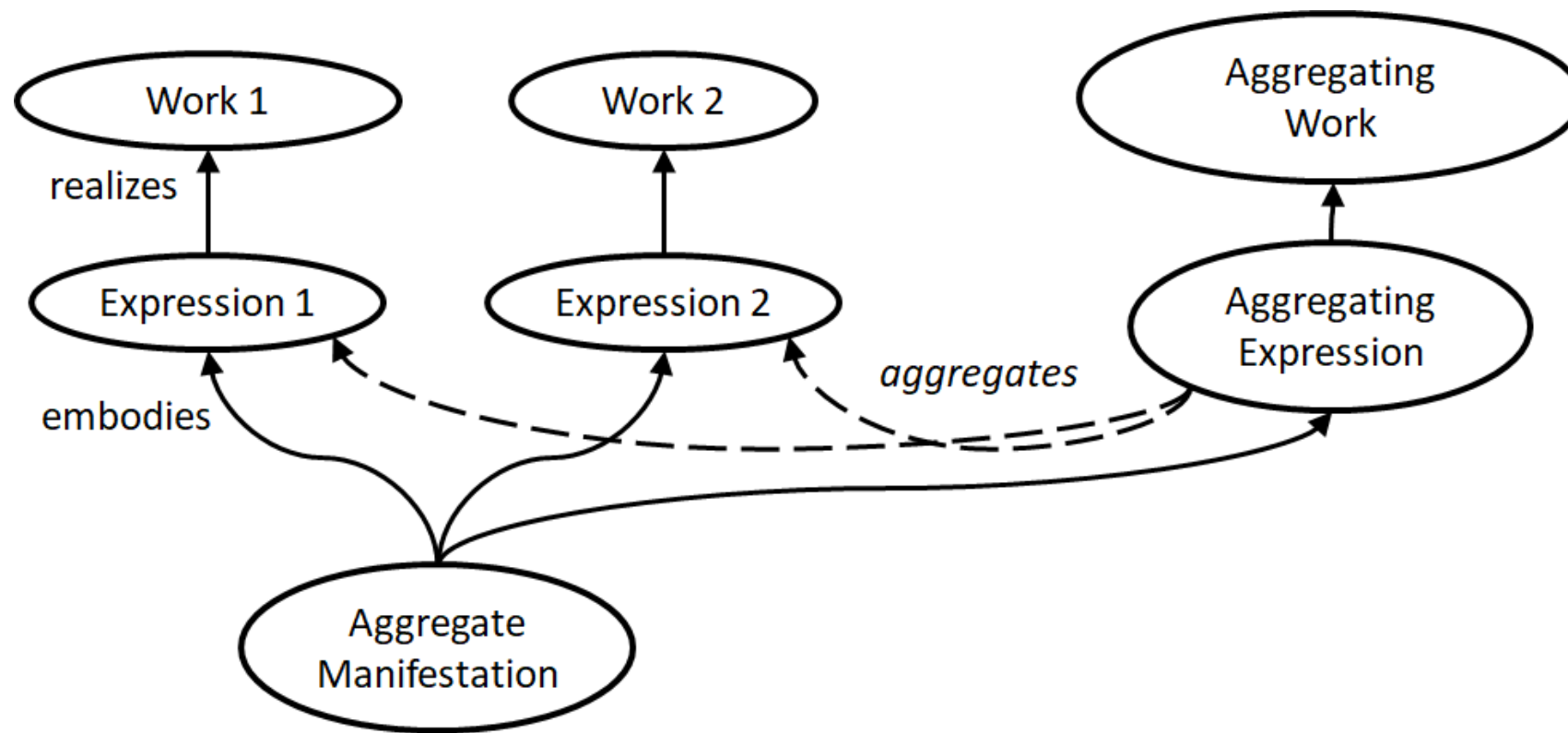
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Aggregates – Definitions

- *aggregating work* ([91.22.30.75](#))
  - A plan to select and arrange one or more expressions of one or more works, and embody them in an aggregate [manifestation]

- *aggregating expression* ([88.69.69.51](#))
  - The realization of an aggregating work's plan

- *aggregate manifestation* ([20.12.56.08](#))
  - A manifestation that embodies an aggregating expression and one or more expressions that are aggregated
  - The expressions that are aggregated may realize one or more works
  - The manifestation may be issued in one or more units
  - Three kinds
    - Collection aggregate
    - Augmentation aggregate
    - Parallel aggregate

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Characteristics of Aggregates

- Aggregating works and expressions are *plans,* not the *content*
  - The creator = the agent who came up with the plan

- Not a whole/part relationship
  - The relationship between individual expressions in an aggregate are not an inherent feature of the works they realize
    - The same expression of a novel may be published with and without an introduction
    - A given audio track can appear on different CD compilations

- Work-Expression lock
  - An aggregating expression realizes one and only one aggregating work
    - If two aggregate manifestations have similar but not identical content, there are two different aggregating works/expressions

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LRM Model for Aggregates

The dotted lines represent shortcut relationships
    Aggregating Expression [has] *manifestation of expression* Aggregate Manifestation
    Aggregate Manifestation [has] *expression manifested* Expression 1
    Aggregate Manifestation [has] *expression manifested* Expression 2

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Describing an Aggregate

- Choices, choices!
  - Record all of the works/expressions embodied in the manifestation
    - Monograph that contains two mysteries by different authors
      - Describe them both, and create separate access points
    - Play with scholarly preface
      - Describe the play in detail, and make a note about the preface
  - Record some of the works/expressions embodied in the manifestation
    - But not all of them; some may not be important enough to mention
  - Simply relate the aggregate manifestation to the aggregating work/expression
    - Classical Korean poetry : more than 600 verses since the 12th century
    - Chinese tales : an enchanting collection of 24 Chinese folk tales and fairy tales

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Specific Aggregate Elements

- Includes the following (and their inverses)
  - *aggregates*
    - An expression that is chosen as part of the plan of an aggregating expression
  - *manifestation of expression*
    - A physical embodiment of an expression
  - *collective title*
  - *contributor agent to aggregate*
    - An agent who creates an expression of a work that is embodied by an aggregate
  - *contributor agent of music*
  - *contributor agent of still image*
  - *contributor agent of text*

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Diachronic Work – Definition

- A work that is planned to be embodied over time, rather than as a single act of publication ([64.43.91.71](64.43.91.71))

- Content changes over time – by design
  - We can't predict the future, but our cataloging may give some clues
    - Which may or may not prove true!

- More than just serials
  - Includes multipart monographs issued over time

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Characteristics of Diachronic Works

- Has an extension plan
  - Extension requirement: Is the addition of content required to sustain the integrity of the work?
  - Extension mode: How will the content be extended through time?
    - Accumulation / succession
      - Supplements, new issues of journals, additional volumes, etc.
    - Replacement / integration
      - Loose leaf for updating, dynamic web resources, etc.
  - Extension termination: May or may not have an anticipated ending date

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Work-Expression-Manifestation (WEM) Lock

- A diachronic work is realized by one and only one expression and embodied by one and only one manifestation

- If the diachronic work plan changes, you have a new work

  - Such changes may include differences in

    - scope or editorial policy, genre or literary form, target audience, style

  - The online and print versions of a serial may be identical so far, but may diverge in the future – thus they are separate works from the outset

    - Enter the "work group" concept:

      - A group of two or more works that have a common appellation assigned from a vocabulary encoding scheme

      - Not an element itself; but some work group elements exist, including

        - *authorized access point for work group*

Specific Diachronic Elements

- Includes the following (and their inverses)
  - *editorial director agent*
    - An agent who has legal or intellectual responsibility, but not creative responsibility, for the editorial policy and content of a diachronic work
  - *founder agent of work*
    - An agent who is responsible for initiating a diachronic work
  - *integrating work*
    - A diachronic work that is planned to be realized in a single expression
  - *successive work*
    - A diachronic work that is planned to be realized in multiple distinct expressions

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Representative Expression – Definition

- Provides the values of specific elements used to identify a work and distinguish it from other works ([67.70.57.96](67.70.57.96))

- Any expression can be used as a *representative expression*
  - With the relevant representative expression element values coming from that expression

- There may be more than one expression that can be treated as a *representative expression*
  - With different representative expression element values coming from different expressions

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Representative Expression Elements

- Characteristics that
  - Originally "live" at the Expression level in the LRM model
  - Become identified as Work attributes because they best represent the intention of the creator(s)
  - 17 such elements added to RDA, including:
    - *language of representative expression*
    - *script of representative expression*
    - *date of representative expression*
    - *extent of representative expression*
    - *colour content of representative expression*
    - *content type of representative expression*

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Representative Expression Example

Katsushika's The Great Wave off Kanagawa
神奈川沖浪裏

Image source: http://hdl.loc.gov/loc.pnp/jpd.02018

has content type of representative expression:
   still image
has date of representative expression:
   1826
has colour content of representative expression:
   color
has language of representative expression:
   Japanese

Main utility:
   construction of access points
   distinct description of similar works

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Representative Expressions & Aggregates

- Use extended to aggregates ([96.74.07.38](#))
  - Aggregating expression is not a representative expression
    - Does not contain the content of the expressions that are aggregated
  - Instead, representative expression elements are derived from one or more expressions that are aggregated
    - Intellectual difference in the model
    - But the same 17 elements are available
      - Here grouped by application to expressions (13), manifestations (2), or cumulative values (2 – duration and extent)

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Community Resources

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New Section of the Toolkit

- First available in the September 2020 release – under Resources
  - Under active development by the RSC
  - Structure and content may change as development continues
- Relocated community-specific instructions from "base RDA"
  - Still available within the Toolkit
  - Includes reworking of the original Toolkit's Appendices for Capitalization, Abbreviations, Initial Articles, and Titles of Nobility
- In the future, will include details about string encoding schemes
- Control of content and development up to user communities

POLICIES	RESOURCES
	Glossary
	Vocabulary Encoding Schemes
Community vocabularies	Community resources
	Revision History
	Original Toolkit
	AACR2

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String Encoding Scheme

- RDA definition: A set of string values and an associated set of rules that describe a mapping between that set of strings and a value of an element

- The rules/instructions tell catalogers how to build a string
  - Components of the string
  - The order of the data
  - Punctuation or other delimiters

- Example
  - Yao, Ming, 1980- [LC/NACO authority file]
  - Yao, Ming (1980-) [National Library of Poland]
  - 姚明

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More Information

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

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Questions?

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