

Getting Ready to Use the New RDA

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R | D | A
Resource Description & Access

Today's Topics

- Orientation
 - Definitions
 - Brief overview
 - Differences between the original and official RDA Toolkits
- Supplemental information
- Steps to take in cataloging a book
 - Abbreviated example
- Q & A

Definitions



Base RDA

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

RDA Toolkit

- An integrated, browser-based, online product that allows users to interact with a collection of cataloging-related documents and resources, including
 - RDA guidelines and instructions (e.g., base RDA)
 - Policy statements
 - User documents
 - Etc.
- Official RDA Toolkit: the current version, available at <https://access.rdatoolkit.org>
- Original RDA Toolkit: the version frozen in 2017, available at <https://original.rdatoolkit.org>

Brief Overview

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RDA Toolkit Homepage

R | D | A TOOLKIT Original Toolkit Bookmarks and Notes Documents Views Help English Submit Feedback

University of Maryland College Park Kathy Glennan

ENTITIES GUIDANCE POLICIES RESOURCES Exact Title Search


Welcome back, **Kathy** Last Toolkit Release: July 2021

Recently Viewed

- Element: title of manifestation
2021/11/04 10:02:41 EST
- Element: carrier type
2021/11/03 05:48:51 EST
- Element: media type
2021/11/03 05:47:41 EST
- Element: content type
2021/11/03 05:46:31 EST

News

All News >



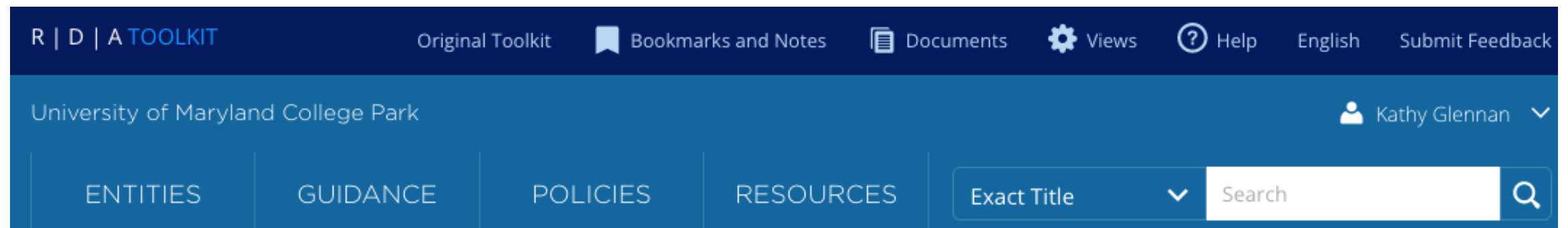
Sign Up for Free RDA Toolkit Demos in French and Spanish

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

[Read more](#)

Latest News on the RDA Toolkit Server Migration

RDA Toolkit Navigation



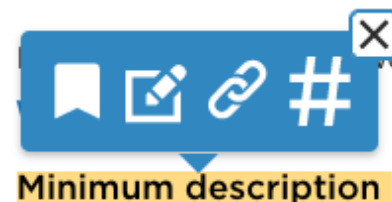
- Profile features are in the dark blue bar
- Content tabs in the lighter blue bar; use drop-down menus
- Major differences from the original Toolkit
 - No table of contents
 - Ability to view a selected policy statement set in context with the instructions
 - Guidance chapters separate from instructions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

Stylistic Differences – Layout

- Flat structure

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

- Links
- Citation numbers



- More flexible for an international audience

- Or other specialized communities

Stylistic Differences – More Specificity

- Separate elements for agent, collective agent, corporate body, family, person
 - *architect agent*
 - *architect collective agent*
 - *architect corporate body*
 - *architect family*
 - *architect person*
- Two kinds of transcription guidelines
 - Basic transcription
 - Normalized transcription

Stylistic Differences – Instructions

- Some rewording
 - More machine-predictable; also easier for translators
 - More compatible with linked data applications
 - Generalized instructions where possible
 - Helps in goal to remove Anglo-American focus
 - Greater consistency across the Toolkit – a long-standing interest
 - Anyone remember the 2002-2007 CC:DA [Task Force on Consistency across Part I of AACR2?](#)
- New and/or different terminology deriving from data model
 - Nomen, Timespan (new entities from IFLA Library Reference Model)
 - Element subtype (AKA narrower element)
 - Entity supertype (AKA broader entity)

Stylistic Differences – Condition/Option Boxes

- Replace complex if/then construction in the original Toolkit
 - As well as optional additions, optional omissions, and exceptions
- Choices now presented more like a decision tree
- Policy statements may be associated with these, to provide community guidance
- Note: Option boxes may exist without related condition boxes

Old vs. New Approach

Original Toolkit

2.4.1.8 Noun phrases occurring with a statement of responsibility

If:

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

and

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

then:

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

Official Toolkit

Statement of Responsibility ([88.22.88.92](#))

Noun phrases occurring with a statement of responsibility

CONDITION

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

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

OPTION

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

Elements

- Have a unique name and identifier
 - Element name does not have to be label you show to your users
- Can only describe one entity
- Two types
 - Attribute element
 - Characteristic of the entity; no relationship to other entities
 - Under *person*:
profession or occupation: A vocation or avocation
 - Relationship element
 - Relates two RDA entities (e.g., *person* and *timespan*)
 - *date of birth*: A timespan during which a person was born
 - Paired with an inverse element
 - *date of birth of*: A person who was born during a timespan

Structure of Element Pages

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

Example: *history of work*

Entities > [Work](#) > [history of work](#)

history of work

Select Policy Statement Set (2)

LC-PCC PS ▼

Definition and Scope

A summary of information about the history of a work.

 Element Reference

Prerecording

Recording

Recording an unstructured description

OPTION

Incorporate information associated with the following elements:

- Work: [date of work](#) →
- Work: [category of work](#) →
- Work: [place of origin of work](#) →
- Work: [variant title of work](#) →

[Send to Back](#)

LC-PCC

LC/PCC practice: Cataloger's judgment.

For general guidance on unstructured descriptions, see [Guidance: Recording methods](#).

[Recording an unstructured description](#) →.

Example: *history of work*

Recording a structured description

This recording method is not applicable to this element.

Recording an identifier

This recording method is not applicable to this element.

Recording an IRI

This recording method is not applicable to this element.

View in Context Example

 Example

Related Elements

None

 Example

Work

<i>has authorized access point for work</i>	Iphigenia (Motion picture)
<i>has variant access point for work</i>	Ιφιγένεια (Motion picture)
<i>has variant access point for work</i>	Ifigeneia (Motion picture)
<i>has preferred title of work</i>	Iphigenia
<i>has variant title of work</i>	Ιφιγένεια
<i>has variant title of work</i>	Ifigeneia
<i>has category of work</i>	Motion picture
<i>has place of origin of work</i>	Greece
<i>has content type of representative expression</i>	two-dimensional moving image
<i>has director agent of photography</i>	Arvanitēs, Giōrgos
<i>has film director agent</i>	Kakogiannēs, Michalēs
<i>is motion picture adaptation of work</i>	Euripides. Iphigenia in Aulis
<i>has history of work</i>	Iphigenia is the third motion pictured directed by Michalēs Kakogiannēs that is based on a play by Euripides. Kakogiannēs adds some characters who were not in the original play, including the Greek hero Odysseus. The film was released in 1977

Example: Element Reference

Entities > Work > history of work

history of work

Select Policy Statement Set (2)

LC-PCC PS

Definition and Scope

A summary of information about the history of a work.

Element Reference

- IRI**
<http://rdaregistry.info/Elements/w/P10210>
Link to unique IRI in RDA Registry
- Domain**
Work →
What entity the element describes (Relationship elements also have a range)
- Alternate labels**
has history of work
Verbalized label
- IFLA LRM**
<http://iflastandards.info/ns/lrm/lrmer/E1A2>
Link to supporting LRM element set (in this case E1A2, "has note")
- MARC 21 Authority**
MARC 21 Authority 665 ** \$a [unstructured description]
- MARC 21 Bibliographic**
MARC 21 Bibliographic 500 ** \$a [unstructured description]
Mappings to MARC 21

How to Read this Information

The element

place of birth

relates a

Definition and Scope

A place where a person is born.

Element Reference

IRI

<http://rdaregistry.info/Elements/a/P50119>

Domain

Person →

to a

Range

Place →

that is

Alternate labels

has place of birth

+ IFLA LRM

+ MARC 21 Authority

Entities and their Elements

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

Example from “Person” ([61.08.12.74](#))

elements

All Attribute Elements Relationship Elements ▼

Find Element

[address of person →](#)

[biographical information →](#)

[category of person →](#)

[field of activity of person →](#)

[gender →](#)

[language of person →](#)

[note on person →](#)

[profession or occupation →](#)

[related entity of person →](#)

[term of rank, honour, or office →](#)

Other Ways to Find Elements

- Use the search box

A screenshot of a search interface. It features a blue header bar with a dropdown menu on the left showing 'All' and a search input field on the right with a magnifying glass icon.

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

→ **copyright date**

A timespan associated with a claim of protection under copyright or a similar regime.

A copyright date includes a phonogram date associated with a claim of protection for an audio recording.

Inverse: copyright date of

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

A name may be categorized as:

- Person: [preferred name of person](#) →
- Person: [variant name of person](#) →

(example from [06.15.43.81](#))

Toolkit Orientation Resources

- On the RDA Toolkit YouTube channel, watch
 - Toolkit demo, July 2021: <https://www.youtube.com/watch?v=azoBV9GOv-4>
 - Future demos will be announced at <https://www.rdatoolkit.org>
 - RDA Concepts playlist: <https://www.youtube.com/c/RDAToolkitVideo/playlists>
- Consult the RSC website for relevant presentations, including:
 - [The New Normal of RDA: An overview of Structure and Concepts](#) (Kate James, May 2021)
 - [RDA Updates](#) (Kathy Glennan, March 2021)
 - [A Quickstart Guide to RDA Terminology: Elements, SES, and VES](#) (Dominique Bourassa, January 2020)
- Explore on your own: <https://access.rdatoolkit.org>
 - If you're a subscriber to RDA Toolkit, you have access

Supplemental Information Documentation, Tools, etc.

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Community Guidance

- In RDA Toolkit
 - Policy statements
 - Application decisions for a given cataloging agency or community
 - Community resources
 - Community-specific guidance not in the above
 - Documents
 - User-created documentation
 - Can be used privately or shared locally or globally
- Outside RDA Toolkit
 - Application profile
 - Specifies the selection of entities, elements, etc. that are appropriate to a specific application of RDA metadata
 - One or more may ultimately be integrated into RDA Toolkit
 - LC/PCC Metadata Guidance documents

Current Policy Statements

- From three organizations
 - British Library
 - Library of Congress/Program for Cooperative Cataloging
 - Music Library Association
- In draft form, incomplete
- User configuration option to display these in context with the related instructions
- May also access through the policies tab

Application Profile – Definition

- Which data elements to record for an entity
 - Use vs. do not use
 - Level of granularity
- Which elements are mandatory vs. optional
- Which elements are repeatable
- Which vocabulary encoding scheme (VES) to use for an element, if applicable
- Which string encoding scheme (SES) to use for an element, if applicable
- Which recording method(s) to use
- Which optional instructions to apply
- Which policy statements to apply

Application Profile – Function

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

Community Resources (Under Construction!)

- First appeared in April 2021 release
 - Initial content the result of
 - Internationalization needs
 - Commitment to keep currently used instructions within the Toolkit
 - May have associated policy statements
 - Need to be owned by a given community
- Future use, format, content, etc. under discussion

Community Resources (Under Construction!)

- Community refinements
 - Legacy Anglo-American instructions, specific to this community's use
 - Various instructions for creating access points for work, expression, manifestation, person, family, corporate body, and place
 - Selection of preferred titles and creation of access points for legal works, musical works, religious works, and official communications
 - Instructions for how to construct publication, distribution, manufacture, and production statements, as well as edition statements and series statements
- Community vocabularies
 - Controlled terms not part of RDA, but useful to a given community
 - Books of the Bible in English, in French, in German, etc.
 - Abbreviations
 - Terms in specific languages

User-Created Documents

- Created by individual users within the Toolkit
 - Using a simple HTML editor
- 6 categories
 - Application profile
 - Local policy [not the same as Policies!]
 - Map
 - Quick reference
 - Training material
 - Workflow

Steps to Take in Cataloging a Book

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Decide Where to Begin

- Select your encoding scheme
 - Such as MARC 21 or BIBFRAME
- Be aware of supporting/supplemental documentation
 - Application profile
 - Policy Statements
 - Transcription guidelines
 - Check to see if you have local documentation in the Toolkit
- Pick an entity to start with
 - Manifestation, Person, etc.
- Start capturing data

Cataloging Example

Disclaimers

- Application profiles, policy statements, and community best practices are under development and not yet finalized
 - These will be specific to a given community's needs
- It is not possible to give a true demonstration of “how to catalog a book” until all these pieces are in place
- Thus, the following example
 - Contains assumptions about application profile requirements, with a focus on retaining current North American practices where possible
 - Centers on the Manifestation entity, and only includes basic elements
 - Does not include quotations or screen shots from the Toolkit

Element name	Required	Repeatable	Recording Method
Media type	Yes	Yes	Structured
Mode of issuance	Yes	No	Structured
Title proper	Yes	No	Unstructured
Parallel title proper	Yes, if applicable	Yes	Unstructured
Other title information	Yes, if applicable	Yes	Unstructured
Statement of responsibility relating to title proper	Yes, if applicable	Yes	Unstructured
Variant title of manifestation	Yes, if applicable	Yes	Unstructured
Designation of edition	Yes, if applicable	Yes	Unstructured
Designation of named revision of edition	Yes, if applicable	Yes	Unstructured

Sample Application Profile

Element name	Required	Repeatable	Recording Method
Statement of responsibility relating to edition	Yes, if applicable	Yes	Unstructured
Statement of responsibility relating to named revision of edition	Yes, if applicable	Yes	Unstructured
Place of publication	Yes, if applicable	Yes	Unstructured
Name of publisher	Yes, if applicable	Yes	Unstructured
Date of publication	Yes, if applicable	No	Unstructured
Copyright date	No	Yes	Unstructured
Carrier type	Yes	Yes	Structured
Extent of manifestation	Yes	Yes	Structured
Dimensions	Yes	Yes	Unstructured

Element name	Required	Repeatable	Recording Method
Title of series	Yes, if applicable	Yes	Unstructured
Parallel title of series	Yes, if applicable	Yes	Unstructured
Other title information of series	Yes, if applicable	Yes	Unstructured
Statement of responsibility relating to series	Yes, if applicable	Yes	Unstructured
Numbering within sequence	Yes, if applicable	Yes	Unstructured
Note on manifestation	No	Yes	Unstructured
Identifier for manifestation	Yes, if applicable	Yes	Identifier

(e-book)

ALA Editions • SPECIAL REPORTS

INTRODUCING RDA

A Guide to the Basics after 3R

Second Edition

CHRIS OLIVER

ALA
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Manifestation Information

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

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Manifestation Information

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

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Manifestation Information

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

Manifestation Information

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

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Title proper

- Record as an unstructured description
 - Only choice
 - See if any of the specific conditions apply
- Some additional guidance in *title of manifestation*
 - Transcription choices
 - Source of information: any
 - See if any of the specific conditions apply

Result – with normalized transcription

<i>title proper</i>	Introducing RDA
---------------------	-----------------

Other title information

- Record an unstructured description
 - Only choice
 - Apply your chosen transcription guidelines
 - Source of information: usually the same as the title proper
- Check for policy statement guidance
 - LC/PCC: Core for monographs

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

<i>other title information</i>	a guide to the basics after 3R
--------------------------------	--------------------------------

Statement of responsibility relating to title proper

- Record as an unstructured description
 - Only choice
 - Source of information: same as the title proper (implied by name of element)
 - See if either of the specific conditions apply
 - Two or more values for the element
 - Element in a parallel language or script
- Some additional guidance in *Statement of responsibility*
 - Transcription choices
 - See if any of the specific conditions apply

Result – with normalized transcription

<i>statement of responsibility relating to title proper</i>	Chris Oliver
---	--------------

Designation of edition

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

Result – with normalized transcription

<i>designation of edition</i>	Second edition
-------------------------------	----------------

Place of publication

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

Result – with normalized transcription

<i>place of publication</i>	Chicago
-----------------------------	---------

Name of publisher

- Recording methods include
 - Unstructured
 - Identifier
 - IRI
- Application profile says to use unstructured description
 - Apply your chosen transcription guidelines
 - Source of information: any
 - See if any of the specific conditions apply

Result – with normalized transcription

<i>name of publisher</i>	ALA Editions
--------------------------	--------------

Date of publication

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

Result – with normalized transcription

<i>date of publication</i>	2021
----------------------------	------

Title of series

- Recording methods include
 - Unstructured
 - Identifier
 - IRI
- Application profile says to use unstructured description
 - See if any of the specific conditions apply
- Some additional guidance in *title of manifestation*
 - Transcription choices
 - Source of information: any
 - See if any of the specific conditions apply

Result – with normalized transcription

<i>title of series</i>	ALA Editions special reports
------------------------	---------------------------------

Extent, etc.

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

- *extent of manifestation*

- Create a structured description

- Record a number of units and a term for each kind of unit

1 online resource

- Option (apply per LC/PCC)

- Specify the number of subunits if the online resource parallels a print counterpart

xi, 200 pages

- *illustrative content*

- Option to record “illustrations”

- LC/PCC: cataloger's judgment

Putting It All Together

By Element

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

In MARC 21 Bibliographic Format

245	10	Introducing RDA : ‡b a guide to the basics after 3R / ‡c Chris Oliver.
250		Second edition.
264	1	Chicago: ‡b ALA Editions, ‡c 2021.
300		1 online resource (xi, 200 pages) : ‡b illustrations
490	1	ALA Editions special reports

More Information

- RDA Steering Committee website: <http://www.rda-rsc.org/>
 - Including pages for Presentations (by year) and Documents (by year)
 - 2021 Presentations: <http://www.rda-rsc.org/node/654>
 - 2021 Documents: <http://www.rda-rsc.org/node/653>
 - News and Announcements: <http://www.rda-rsc.org/news>
- Official RDA: <https://access.rdatoolkit.org/>
- RDA Toolkit website: <https://www.rdatoolkit.org>
- RDA YouTube channel [free!]:
<https://www.youtube.com/c/RDAToolkitVideo>

Questions?

Ask now, or email me:

RSCChair@rdatoolkit.org

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