Introduction to RDA
Understanding and Preparing for RDA

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Agenda

- History of RDA
- Differences and Changes
- RDA and Your Systems
- Implementation Planning
- Training Planning
- Future Directions
- Resources
What is RDA?

- Resource Description and Access
  - A cataloging standard to serve as the successor to AACR2
  - A content standard, not a MARC replacement
  - Heavily influenced by IFLA’s FRBR document

- Intended as an online resource
  - RDA Toolkit - [http://www.rdatoolkit.org/](http://www.rdatoolkit.org/)

- Will be implemented by National Libraries on March 31, 2013
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1: General Guidelines on Recording Attributes of Manifestations and Items

1.0: Scope

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1.3: Core Elements
Why RDA?

• Better suited to current technological environment
• More accommodating of different types of resources
• Clearly indicated relationships
• Clearer language for patrons
• More well-defined, structured data, that will be easier for computers to manipulate
• Bring the library community into alignment with other metadata communities
History of US Cataloging Standards

- 1853: (Smithsonian) Report on the Construction of Catalogues of Libraries
- 1876: Rules for a Dictionary Catalog
- 1908: Anglo-American Catalog Rules
- 1941: ALA Catalog Rules
- 1949: Rules for Descriptive Cataloging in the Library of Congress
- 1967: AACR
- 1978: AACR2
- 2010: RDA
History of AACR2

• Originally published by JSC in 1978
• Adopted by national libraries of US, Canada, Britain, and Australia by 1981
• Received regular updates, including the inclusion of rules on electronic files (1987)
• 1988 revision compiled these updates
• 1998 revision
• 2002 revision
• Major updates ceased in 2005
AACR2 Today

- Revisions and updates have ceased, as well as LCRI, so AACR2 is a static document now
- Has been heavily criticized for not addressing contemporary systems and format types
- The transition to RDA in the US will likely take many years, and many libraries will still need catalogers who know AACR2
RDA Background

- Published by Joint Steering Committee, 2010
- Influenced by: FRBR
- Began in 2004 as plans for AACR3 but developed into RDA
- Many purposes, including to correct the inflexibility of AACR2, incorporate the principles of FRBR, reflect changes in technology, appeal to international community and non-library community
History of RDA

• Became Resource Description and Access in 2005
• In 2007, the decision was made to drastically reorganize RDA to fall more in line with the structure of FRBR
• First draft was issued in 2008 for comment
• Revised text was first published in 2010
• Also in 2010, US libraries performed cooperative testing of RDA
2010 US RDA Test

- The findings of a nation-wide, cooperative testing of RDA were mixed
- Many participants noted that RDA was difficult to work with
- 2013 set as target implementation date for National Libraries, contingent upon certain provisions being met
  - Rewrite key chapters
  - Improve functionality of RDA Toolkit
  - Demonstrate progress towards a MARC replacement
RDA Today

- March 31, 2013 is Day 1 for RDA for the National Libraries
  - They will perform original cataloging with RDA only
- Some institutions have already implemented
- Many institutions looking to implement within 1-2 years
Conceptual Differences

• **Paper vs. Electronic**
  ▫ RDA is designed with electronic records in mind
  ▫ RDA records more information, as physical space is no longer an inhibiting factor

• **Arrangement**
  ▫ Whereas AACR2’s setup was largely based on ISBD and physical format, RDA’s setup is based on FRBR
FRBR

• Functional Requirements for Bibliographic Records
  ▫ Set of concepts describing the purpose of records in a bibliographic database and relationships between them
  ▪ Document published by IFLA
  ▪ Defines groups of entities
  ▪ Describes relationships between entities
  ▪ Defines user tasks
  ▪ Independent of AACR2, RDA, MARC, etc.
FRBR User Tasks

• **Find**: find resources that correspond to a user’s search criteria

• **Identify**: confirm that a resource corresponds to the search, or, differentiate among various resources

• **Select**: choose a resource that corresponds to a user’s needs

• **Obtain**: access or acquire the chosen resource
Noticeable Differences

- Capitalization
- Abbreviation
- Transcription
- English terminology
- Rule of 3
- Material types
- Relationship designators
Capitalization

• LC encourages us to follow same capitalization we used under AACR2, but other capitalization is allowed

AACR2:

Cataloging and classification : an introduction

RDA:

Cataloging and Classification : An Introduction
Abbreviations

• Many abbreviated terms are fully spelled out now

**AACR2:**


**RDA:**

xii, 365 pages, 17 unnumbered pages of plates : color illustrations ; 23 cm.
Take What You See

• Transcription in RDA is much more just “take what you see” than AACR2 was

AACR2:
  3rd ed.

RDA:
  Third edition
Fewer Latin Terms

- Latin terms and abbreviations are mostly replaced by English phrases

**AACR2:**
[S.l. : s.n.], 1967.

**RDA:**
[Place of publication not identified] : [publisher not identified], 1967.
No More Rule of 3

- **AACR2** limited the amount of authors recorded to 3. Under **RDA**, **LC** encourages you to give no limit.

**AACR2:**
H&M and Karl Lagerfeld / Sharon Lee Tate ... [et al.]

**RDA:**
H&M and Karl Lagerfeld / Sharon Lee Tate, Joseph Rosa, Cathy Horyn, Suzanne Slesin, and Helena Rubistein.
No More GMD...

• A General Material Designator is no longer recorded in the title

**AACR2:**
Lord of the golden hand [electronic resource] / James Bryce

**RDA:**
Lord of the golden hand / James Bryce
...But 3 New Fields Instead

- This information is now conveyed by Content, Media, and Carrier Types
  - Content Type (MARC 336): the form of communication through which a work is expressed
  - Media Type (MARC 337): the general type of device needed to use the resource
  - Carrier Type (MARC 338): the format of storage for the resource
## Content, Media, and Carrier

<table>
<thead>
<tr>
<th>Type</th>
<th>Content</th>
<th>Media</th>
<th>Carrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Book</td>
<td>text</td>
<td>unmediated</td>
<td>volume</td>
</tr>
<tr>
<td>Sound Recording</td>
<td>performed music</td>
<td>audio</td>
<td>audio disc</td>
</tr>
<tr>
<td>Videorecording</td>
<td>two-dimensional</td>
<td>video</td>
<td>videodisc</td>
</tr>
<tr>
<td>eBook</td>
<td>text</td>
<td>computer</td>
<td>online resource</td>
</tr>
</tbody>
</table>
Publication, Distribution, Manufacture, and Copyright Information

- AACR2 recorded all of this information in one statement, while RDA separates them out.

**AACR2:**

| 260 | London : ‡b Shepherd-Walwyn ; ‡a New York : ‡b Distributed by International Publications Service, ‡c 1967, c1965. |

**RDA:**

| 264 1 | London : ‡b Shepherd-Walwyn, ‡c 1967. |
| 264 2 | New York : ‡b Distributed by International Publications Service |
| 264 4 | ©1965 |
Relationship Designators

• RDA allows you to qualify access points with a term explaining the relationship to the resource Chan, Lois Mai, author. Coldplay (Musical group), performer. National Endowment for the Arts, sponsoring body.
Relationship Designators

• Designators are not just for people and corporate bodies!


In series: Polymer liquid crystal series ; 3.
Functional Differences

- More access points provide more opportunities for patrons to find resources
- Relationship designators allow more complicated questions to be asked of our catalog
- New content, media, and carrier information allow much more sophisticated searching limits
Functional Differences

• Many RDA records are already functioning normally in our catalogs
• To fully reap the benefits of RDA though:
  ▫ Our systems must utilize this new information
  ▫ Our legacy data may need to be brought closer in line with RDA
RDA Record Example

Bibliographic Information

Personal Author: Schoenbaum, David, author.
Title: The violin : a social history of the world's most versatile instrument / David Schoenbaum.
Copyright info: ©2013
Physical description: xvi, 710 pages, [16] pages of plates : illustrations (chiefly colored) ; 25 cm
Content type: text
Medium: unmediated
Format: volume
Bibliography note: Includes bibliographical references and index.
Contents: Making it. A star is born ; The golden age ; Over the hills and far away ; The road not taken ; Back to the future ; Last but not least -- Selling it. Paying the price ; The French connection ; The Ritz of violin shops ; From modern to postmodern ; "Fiddle, n. A swindle. orig. U.S." ; Violin cases -- Playing it. Learning how ; Players in general ; Players in particular ; Founding fathers ; How to get to Carnegie Hall ; Race, class, and gender ; Business and politics -- Imagining it. Still pictures worth a thousand words ; Poetry ; Prose ; Moving pictures worth a thousand words -- Coda.
Summary: The life, times, and travels of a remarkable instrument and the people who have made, sold, played, and cherished it.
Subject term: Violin.
Subject term: Violin--History.
LCCN: 2012033866
ISBN: 9780393084405 (hardcover)
ISBN: 039308440X (hardcover)
RDA Record Example

What does long-term care include?
National Institutes of Health (U.S.), issuing body.

Click here to access online content.

Bibliographic Information

Title: What does long-term care include?
Publication info: [Bethesda, Md.]: [National Institutes of Health], [2012?]
Physical description: 1 online resource (1 streaming video file (4 min., 8 sec.)) : SWF file, sound, color + 1 transcript (HTML file)
Content type: two-dimensional moving image
Content type: text
Medium: computer
Format: online resource
General Note: Title from HTML header (viewed December 7, 2012).
Summary: Defines long-term care for the elderly and describes the varieties of services that constitute its various forms, viz.: Home-based, community-based, and facility-based care. Includes referral and contact information for the Eldercare Locator which is national in scope.
Language note: Closed-captioned.
Corporate subject: Eldercare Locator (Referral service : U.S.)--Popular works.
Subject term: Long-term care facilities--United States--Popular works.
Subject term: Senior centers--United States--Popular works.
Subject term: Home-based family services--United States--Popular works.
Subject term: Older people--Services for--United States--Popular works.
Genre or Form: Internet videos.
Added Author: National Institutes of Health (U.S.), issuing body.
RDA and Your Systems

• ILS
  ▫ Check with your ILS provider on their plans for accommodating RDA
    • MARC Update 15 (Sept. 2012)
  ▫ You will need to make sure your bibliographic tag tables allow the new RDA fields
  ▫ Your system may require an upgrade to fully support RDA
  ▫ Let your vendor know what you need!
RDA and Your Systems

- **OPAC**
  - You may need to make decisions on whether to index and/or display new information in RDA records
  - At least get 264 field indexed and displayed
  - 1XX, 7XX, 8XX $e should display
  - The loss of the GMD in RDA records may cause problems for patrons and staff
  - Again, RDA compatibility may be tied to an upgrade for your ILS
The timeline of presidential elections : how campaigns do (and do not) matter
Erickson, Robert S.

Bibliographic Information

Personal Author: Erickson, Robert S.
Title: The timeline of presidential elections : how campaigns do (and do not) matter / Robert S. Erickson and Christopher Wlezien.
Physical description: viii, 209 pages : illustrations ; 23 cm.
Content type: text
Medium: unmediated
Format: volume
Series: Chicago studies in American politics.
Series: Chicago studies in American politics
Bibliography note: Includes bibliographical references (pages [195]-201) and index.
Contents: Election campaigns and voter preferences -- Uncovering vote intentions using trial-heat polls -- Thinking about campaign dynamics -- Vote intentions over the campaign timeline -- From the campaign to election day -- Sources of change over the campaign timeline -- Campaign dynamics and the individual voter -- The evolution of electoral choice over the campaign timeline -- Appendix: Vote Intention data.

Subject term: Presidents--United States--Election.
Subject term: Political campaigns--United States--History.
Geographic term: United States--Politics and government.
Added author: Wlezien, Christopher.
LCCN: 2012002365
ISBN: 9780226922140 (cloth : alkaline paper)
ISBN: 0226922146 (cloth : alkaline paper)
ISBN: 9780226922157 (paperback : alkaline paper)

http://catalog.lib.byu.edu
RDA and Your Systems

• Discovery Layers
  ▫ Many discovery layers, such as SUMMON or WorldCat Local have not depended on the GMD, which makes them a little more RDA friendly
  ▫ You’ll still want to make sure 264 is indexed and displayed
  ▫ You may wish to index or display additional fields
Other System Considerations

• Authority Control
  ▫ After March 31, 2013, all new authorities in the NAF must be RDA records
  ▫ Local authorities could still be AACR2
  ▫ The NAF is undergoing programmatic changes to make all authorities RDA compatible
  ▫ You may receive a large amount of authority updates this year
  ▫ If you subscribe to an authority service, speak to your vendor about this
Other System Considerations

- Legacy Data
  - Vendors like Marcive are offering services to RDA-ize your current bibliographic database
  - OCLC also plans to add RDA elements to non-RDA records in WorldCat
  - MarcEdit 5.8 includes RDA Helper, allowing you to RDA-ize records yourself, or add GMDs to RDA records
Implementation Planning

• How and when will you implement RDA?
  ▫ RDA implementation is not required
  ▫ Libraries may continue to catalog under AACR2

• Generally, our lives are much easier if we follow LC
  ▫ As more libraries implement, more copy cataloging will become RDA
Implementation Planning

• Many libraries form teams or committees when implementing new technology or new standards
• An RDA implementation group should include representatives from at least:
  Cataloging
  Systems
  Access/Public Services
• Smaller working groups can be formed for more specific needs
Implementation Considerations

- Access to RDA
- ILS/Systems impact
- Examine the flow of MARC data
- Legacy data decisions
- Communication planning
- Crafting and maintaining local policies
- Developing a training plan
Access to RDA

• If you do not have access to RDA yet, you should subscribe to the RDA Toolkit
  ▫ http://www.rdatoolkit.org/
• Institutional subscriptions are by concurrent users
• Free 30-day trial available
• A print version of RDA is available, but not recommended
Access to AACR2

- Effective April 1, 2013, online access to AACR2 is no longer available through Cataloger’s Desktop!
  - Access to AACR2 is now through RDA Toolkit
  - You will need an RDA Toolkit subscription to access AACR2
  - If you have Cataloger’s Desktop and RDA Toolkit, you will still be able to access AACR2 through Cataloger’s Desktop
IAL/S-Systems Impact

- Decide on new data to index and/or display
- Decide on possible new search limits
- MARC validation tables
- Other Cataloging or Acquisitions settings
- OCLC Connexion settings and macros
- Communication with your vendor and systems staff is important
The Flow of MARC Data

- Follow the flow of MARC records to determine who will be affected by RDA data
- Who interacts with MARC data and how will effect your communication and training plans
- If you outsource cataloging, talk to your provider about RDA records
- Who else is making or using your MARC records?
Legacy Data Decisions

• There is the potential for in-house or outsourced RDA-izing of AACR2 MARC records, or AACR2-izing of RDA records
  ▫ I would suggest waiting for now, as most systems aren’t doing much with RDA data yet
  ▫ Adding GMDs may be attractive to some institutions
• Talk to your authorities vendor about updates to the NAF
Communication Planning

• Decide on who needs to know what, and when
  ▫ I’d recommend basic information to all staff as soon as possible
  ▫ Communicate with staff who may already be working with RDA records
  ▫ Communication with patrons?
Local Copy Cataloging Policy

• You probably already have RDA records in your system
• Decide on what to do with RDA (or AACR2) copy cataloging
  ▫ Do not create duplicate records
  ▫ Do not change RDA records to AACR2
  ▫ May change an AACR2 record to RDA if upgrading
  ▫ May add some RDA data to AACR2 records (hybrids)
  ▫ Make sure cataloging staff can recognize good RDA, AACR2, and hybrid records
Local RDA Policies

- RDA has many more options and alternatives than AACR2 did
  - RDA is qualified throughout by LC-PCC PS
  - Some options or alternatives are still up to your institution
    - When to record non-Core data
    - How many Access Points to include
    - How many authors to list
    - Publication and copyright information
Local RDA Policies

• When to start cataloging under RDA?
  ▫ Make sure systems are set first!
  ▫ Look at the original cataloging your institution is currently doing for opportunities

• You may wish to switch over for print monographs first

• When and how to switch to RDA cataloging is up to you!
Training Planning

• Who needs to be trained?
• How much training will be needed?
• What training materials will you use?
• Who will do the training?
Who Needs to Be Trained?

• Likely, all staff should be given some basic information on RDA and what is happening at your library
• For more in-depth training, think of which staff interacts with catalog records, and in what ways
  ▫ Cataloging
  ▫ Systems
  ▫ Acquisitions
  ▫ ILL
  ▫ Public Services
How Much Training Will Be Needed?

• This will depend on if and when you plan to implement
  ▫ Even if not implementing this year, some staff may need copy cataloging instruction for RDA
• You may wish to implement in stages if possible
• Other considerations
  ▫ Other institutional demands/projects
  ▫ Availability of materials to practice on
What Training Materials Will You Use?

- Cataloger’s Learning Workshop
  - LC’s materials might be a bit much for most libraries, but are a good starting point
- ALCTS Webinars
- Other institutions
  - University of Chicago
  - North Carolina State University
  - Cornell University
- For catalogers, RDA training should start with FRBR training!
Sample Training Plan

- **FRBR Introduction**
  - February 2013
  - Cataloging staff

- **RDA Introduction**
  - March 2013
  - All staff
Sample Training Plan

• RDA Lite
  ▫ April – May 2013
  ▫ Basic FRBR, recognizing RDA records, copy cataloging
  ▫ Cataloging, Gov Docs, Acquisitions, ILL staff

• RDA: Formats
  ▫ Summer/Fall 2013
  ▫ Original cataloging for various common formats
  ▫ Cataloging staff
Future Developments

• RDA continues to develop
  ▫ Various groups are still in the process of recommending changes to RDA
  ▫ Portions of RDA have not been written yet!
  ▫ Best practices for RDA still emerging
  ▫ RDA Toolkit continues to develop as well
Future Developments

• RDA will take years to implement
  ▫ Advances in technology offer opportunities we did not have during AACR2 implementation
  ▫ However, reception to RDA has been mixed
  ▫ Many institutions are limited by financial considerations
  ▫ Institutions will continue to need knowledge of AACR2 for the foreseeable future
Future Developments

• A replacement for MARC
  ▫ RDA was designed without any particular encoding standard in mind
  ▫ MARC is the predominant standard now, but many feel that it cannot fully encode the information RDA asks us to record
  ▫ The library community is interested in replacing MARC now more than ever
Future Developments

• Bibliographic Framework Transition Initiative
  ▫ http://www.loc.gov/marc/transition/
  ▫ LC’s cooperative initiative to develop a replacement to MARC
  ▫ Working with Zepheira and other library institutions
Future Developments

- **BIBFRAME**
  - [http://bibframe.org/](http://bibframe.org/)
  - The currently proposed standard to serve as a MARC replacement
  - Based on Linked Data
  - A work in progress (but progressing for sure!)
Main Resources

- RDA Toolkit
  - http://access.rdatoolkit.org/
- RDA Joint Steering Committee
- Library of Congress RDA Training Materials
Main Resources

- **PCC**
  - http://www.loc.gov/aba/pcc/
- **PCC RDA Examples**
- **FRBR**
  - http://www.ifla.org/publications/functional-requirements-for-bibliographic-records
Main Resources

- University of Chicago
- NCSU
  - https://staff.lib.ncsu.edu/confluence/display/MNC/RDA
- Cornell University
  - https://confluence.cornell.edu/display/culpublic/RDA+Documentation
Main Resources

- Resources Handout
- RDA Preparation Checklist
Questions?

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