

# Cataloging with RDA

2022 update

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Bobby Bothman

Chris Oliver

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# Not a “how to” workshop yet

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Themes for today --

- Why we are not ready for a “how to” workshop yet
- Why RDA Toolkit changed
- What we need to know now

# 3 sections

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## 1. The new, official RDA Toolkit

- why it had to change and a quick overview
- a brief look at the new Toolkit

*Chris*

*Bobby*

## 2. IFLA Library Reference Model (IFLA LRM) and RDA

- a brief look at IFLA LRM and its influence on RDA
- new concepts from IFLA LRM that are now part of RDA

*Chris*

*Bobby*

## 3. Finding your way through RDA

- data elements
- application profiles
- moving beyond MARC 21

*Bobby*

*Chris*

*Bobby*

# RDA Toolkit: why it had to change

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1. RDA is constantly evolving
2. Reasons for the 3R project and a brief overview of the impact of those changes
3. The role of the cataloging community in implementing RDA

# The standard and the Toolkit

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## **1 standard**

RDA = integrating resource  
constantly evolving

## **2 RDA Toolkits**

original  
official (the new one)

# Different types of changes

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- a. Changing the content – changing the instructions, changing definitions
  - through broad consultative processes
  - will have impact on cataloging communities
- b. Minor changes – fine-tuning
  - “Fast track”
  - Typographical errors
- c. 3R
  - No intention to change the basic content of RDA
  - Restructure completely
  - Add content

# RDA and how it evolves

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Community involvement from the start:

2005-2009 RDA developed with feedback from cataloging communities

2010 RDA first published

2011 Process of revision through community proposals starts

2012 First update with revisions to instructions

2012-2017 Regular yearly revisions to the standard

2016-2020 3R Project

2021 Process of revision through community proposals re-starts

# RDA first published in 2010

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- technological infrastructure and software get old
- need to maintain alignment with IFLA's bibliographic conceptual models
- our collective experience using RDA and the Toolkit since 2010
- increasing international use of the standard



# Need for a big change

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2016: announcement of the 3R project

2020: 3R project completed

## **RDA**

- big renovation project
- changes that could not wait

## **Restructure**

## **Redesign**

- 1) update the RDA Toolkit infrastructure
- 2) incorporate the newest IFLA model, IFLA LRM
- 3) optimize for the linked data environment
- 4) take the opportunity to internationalize

# 3R project: updated the infrastructure

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RDA Toolkit needed updating

RDA Toolkit = infrastructure for the RDA standard

- update the software
- restructure how RDA is stored and accessed in the Toolkit
- more efficient workflows for revisions and translations
- meet W3C accessibility guidelines
- upgrade the interface to meet the expectations of Toolkit users

*new* RDA Toolkit = new infrastructure for RDA

# 3R Project: incorporated IFLA LRM

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RDA is based on the IFLA bibliographic conceptual models

- IFLA Library Reference Model published in 2017
  - FRBR, FRAD and FRSAD become obsolete
- RDA had to be aligned with the valid IFLA model
- IFLA LRM introduces new entities, changes some of the modelling
  - RDA adds entities and elements and changes modelling

# Designed for flexibility

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Guidance > [RDA implementation scenarios](#)

## RDA implementation scenarios

There are many database structures that are suitable for storing and supplying RDA data. The scenarios described below illustrate the range of potential configurations of RDA data and reflect the distinct structures that are commonly used for library and cultural heritage metadata.

- [Scenario A: Linked open data](#)
- [Scenario B: Relational or object-oriented data](#)
- [Scenario C: Bibliographic/authority data](#)
- [Scenario D: Flat file data](#)

Screen image from the RDA Toolkit ([www.rdatoolkit.org](http://www.rdatoolkit.org)) used by permission of the Copyright Holders for RDA (American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals).

# 4 recording methods

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- to accommodate the different implementation scenarios
- to support communities that operate in different technological environments
  - unstructured description  
*free text, transcription*
  - structured description  
*a controlled term, access point, code*
  - identifier  
*a string of characters associated with a VES*
  - IRI – internationalized resource identifier  
*globally unique, machine-readable string*

# Metadata statement using IRIs

subject, object and predicate all recorded using IRIs

Screen image from the RDA Toolkit (www.rdatoolkit.org) used by permission of the Copyright Holders for RDA (American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals).

## View as Relationship Example

👁 Example

### Person

Walcott, Derek *has country associated with person* Saint Lucia (nation)

<http://isni.org/isni/0000000114709596>

<http://rdaregistry.info/Elements/a/P50097>

<http://vocab.getty.edu/page/tgn/7004772>

# 3R Project: internationalize RDA

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Restructure and reorganize the content of RDA

= opportunity to increase internationalization

- add the design objective of internationalization
- expand the options available to a cataloger
- focus on interoperability, compatibility of data around the globe
- requires local decisions
- opportunities for community involvement

# Internationalization – a design objective

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- the focus is on **data harmonization**

“RDA is designed for an international audience with the expectation that cataloguing agents will make application decisions when desirable”

...

“Given the flexibility of the guidance and recording methods, the metadata provided by different agents will **not necessarily be identical**, but as well-formed data it will be understood by any agent when shared. The emphasis is on **data harmonization** rather than strict compatibility.”

*RDA > Introduction to RDA > Objectives and principles governing RDA*



# Accommodation of variations

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- RDA is a package of data elements, guidelines, and instructions for use by metadata creators around the globe, working in many different contexts
- IFLA LRM provides the basic structure for bibliographic data
- one shared element set
- 4 recording methods to reflect different technological environments
- Choices about elements to use and about instructions to follow
- Choices about vocabulary encoding schemes (controlled vocabularies) and string encoding schemes (schemes for constructing/punctuating text strings)

# Global standard / Local choices

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- “Global standard, local choices” (quote from RSC Chair, K.Glennan)
- IFLA LRM provides the basic structure for bibliographic data
- RDA provides the set of data elements with guidelines and instructions
- Each cataloging community decides how they will implement RDA
- We do not all have to use the element set in the same way

# RDA: many paths

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- at first, the level of choices seem overwhelming
- nobody uses RDA without their own map through it
- the choices support internationalization, flexibility, and interoperability
  - accommodate different ways of creating a metadata description
  - by accommodating different ways within one element set
    - >>> interoperability of bibliographic data around the globe

# Need a map

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- a front-line cataloger needs to know the choices to follow
- implementation requires a set of decisions
- many different types of documentation are possible –
  - policy statements
  - application profiles
  - templates
  - manuals
  - documents within the RDA Toolkit or external to the Toolkit

# Who makes the choices?

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- a cataloging community
- many different types of communities making decisions
  - international cooperatives  
*for example, Program for Cooperative Cataloging*
  - share a common language  
*for example, the German speaking countries in Europe*
  - focus on a special type of resource  
*for example, Music Library Association*

# Choices depending on one's context

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- For example, constructing an authorized access point, RDA instructs to choose
  - the “vocabulary encoding scheme”
  - the “string encoding scheme”

If my library uses the LC/NACO authority file as VES and SES

Olympic Games (31st : 2016 : Rio de Janeiro, Brazil)

*preferred forms of names, order, punctuation*

*But using other VES:*

Juegos Olímpicos (31°. 2016. Rio de Janeiro)

Olympische Spiele (31. : 2016 : Rio de Janeiro)

Jeux olympiques (31es : 2016 : Rio de Janeiro, Brésil)

# Not new

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## Not new

- AACR2 – usually used with Library of Congress Rule Interpretations
- original RDA
  - published in 2010
  - more choices to be made than in AACR2
  - training had to wait until the Library of Congress had a preliminary set of policy statements to share

# Who is your cataloging community?

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- Library of Congress and the Program for Cooperative Cataloging (LC-PCC)
- OLAC best practices
- Music Library Association

We wait for these authoritative bodies to make decisions and give us the green light to go.



LC-PCC not before June 2023



# Example of community's choice

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when using controlled vocabulary (vocabulary encoding scheme) to record data:

Structured description

Instruction to use one of the RDA vocabulary encoding schemes

Followed by instruction to use another suitable vocabulary encoding scheme

Examples in RDA also show use of RDA vocabularies and external vocabularies

# Instructions for *broadcast standard*

## Recording a structured description

### OPTION

Record an appropriate term from the [RDA Broadcast Standard](#) [↗](#) *vocabulary encoding scheme*:

[HDTV](#)

[NTSC](#)

[PAL](#)

[SECAM](#)



### OPTION

Record a term from another suitable *vocabulary encoding scheme*. For general guidance, see [Guidance: Introduction to RDA. Data elements. Data values](#) [↗](#).

Screen image from the RDA Toolkit ([www.rdatoolkit.org](http://www.rdatoolkit.org)) used by permission of the Copyright Holders for RDA (American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals).

# Examples using non-RDA VES at *accessibility content*

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## Recording

👁 Example

Open signed in American Sign language

**Recording method:** unstructured description

Includes subtitles

**Recording method:** unstructured description

Closed captioning available

**Recording method:** unstructured description

synchronizedAudioText

**Recording method:** structured description

**VES source:** W3C

300206232

**Recording method:** identifier

**VES source:** AAT

# After 3R -- new look

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- new software and new technological infrastructure
  - new user interface
  - more modular way of organizing RDA instructions
  - no more chapters, no more sequential instruction numbers
- align with IFLA Library Reference Model
  - new entities and new elements to record information about them
  - new terminology and concepts
  - hierarchical structure – broader and narrower elements
  - more relationships
  - organize the data elements by entity

# After 3R -- new look

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- focus on ensuring reliable use of data by computers
  - greater precision in the data elements
  - many more data elements (3,000 +)
- optimized for a linked data environment
  - more relationships
  - recording method using IRIs
- increased focus on data interoperability
  - one shared set of data elements
  - many options – many choices for how to record the data

# After 3R -- new look

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- looks different but the old paths are still there
- RDA still essentially accommodates the way we work now in the original RDA Toolkit

as well as accommodating many other metadata practices  
while maintaining data interoperability