# Making Way for RDA

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# Outline

- RDA, the standard

    - review of key features
    - influence on RDA – FRBR and FRAD
    - comparison with AACR2
    - examples

# RDA based on IFLA's international models & principles

- *Functional Requirements for Bibliographic Records* (*FRBR*; 1998)

- *Functional Requirements for Authority Data* (*FRAD*; 2009)

- *Statement of International Cataloguing Principles* (*ICP*; 2009)

# RDA, the standard

- Replaces AACR2
- Removal of Anglo-American bias
- Informed by FRBR and FRAD
- Designed for use in digital environment
- Consistent, flexible and extensible framework
- Compatible with international principles, models and standards
- Focus on organizing information for the benefit of the user
- Useable outside the library community

# Addresses user tasks

FRBR:
- Find
- Identify
- Select
- Obtain

FRAD:
- Find
- Identify
- Contextualize
- Justify

- *ICP*s highest principle = "convenience of the user"

# General Principles (ICP)

- Convenience of user
- Representation
- Common usage
- Accuracy
- Sufficiency and necessity
- Significance
- Economy

- Consistency and
- Standardization
- Integration
- Defensible, not arbitrary

- If contradict, take a defensible, practical solution.

# Is a <u>content</u> standard

- <u>Not</u> a <u>display</u> standard (as was AACR2)
  - Does have appendix D for ISBD and appendix E for AACR2 style for access points

- <u>Not</u> an <u>encoding</u> standard
  - Use whatever schema you prefer (MARC 21, Dublin Core, etc.)
  - *MARC 21* used in these training materials (with blank space around subfield codes for ease in reading)

# Includes authority data instructions

- Based on attributes and relationships in FRAD

- Authorized/variant access points and elements will for now be documented in authority records

# Has **controlled** vocabularies

- Only a few <u>closed</u>:  content, media, and carrier types; mode of issuance; etc.

- Most are <u>open</u>:  cataloguer can supply term if needed term not in list

- Some vocabularies being registered on the Web

# FRBR and FRAD in RDA

- each chapter records data associated with one particular user task

- uses the vocabulary and concepts of FRBR and FRAD

- organized according to the entities identified in FRBR and FRAD

- explicit explanation of the relation between the instructions and the user tasks

- emphasis on relationships and on clarifying the nature of the relationships

# RDA: Taking advantage of the digital environment

- ❖ stop fussing about abbreviations
- ❖ more "take as is" – principle of transcription
- ❖ transcribe inaccuracies; add note if necessary
- ❖ enable re-use of metadata

# AACR2: Rules From the Card Catalogue Era

❖ instructions about when to abbreviate and when not to abbreviate

❖ "transcription" but also required to omit and sometimes supply data

❖ use of [sic] for correction of inaccuracies

# RDA: More Information for Users

❖ no more restrictions such as "rule of three"

❖ make the relationships between entities clear to the user:

Appendices **I**, **J**, and **K** = lists of relationship designators

❖ no more Latin abbreviations

# AACR2: Limitations of the 3x5 Card

❖ limits for description and access when there are multiple authors

❖ more focus on the single record, less on relationships

❖ "et al.", "S.l.", "s.n."

# Other Differences from AACR2

- Access points
  - Bible
  - Treaties
  - No more "Polyglot"
  - Birth/death dates (no more b. or d.)
  - More data in authority records
- GMD replaced by
  - content type – carrier type – media type

# Relationships

- Between a person/family/corporate body and a resource

- Between one resource and another resource

- Between one person/family/corporate body and another person/family/corporate body

# Person, etc., and a resource

- Two methods (RDA 18.4):
  - Authorized access point
  - Identifier

- Relationship designators in Appendix I
- Recorded in bibliographic and/or authority data

# Between resources

- Three methods (RDA 24.4):
  - Authorized access point
  - Description (structured or unstructured)
  - Identifier

- Relationship designators in Appendix **J**
- Recorded in bibliographic and/or authority data

# Between one person, etc., and another person, etc.

- Two methods (RDA 29.4)
  - Authorized access point
  - Identifier

- Relationship designators in Appendix **K**
- Recorded in authority data

# AACR2 to RDA vocabulary

| | |
|---|---|
| area | element |
| main entry | authorized access point |
| added entry | access point |
| uniform title | preferred title for a work |
| heading | preferred access point |
| see reference | variant access point |
| author, composer, etc. | creator |
| physical description | carrier description |

# Variant Title

## AACR2
## 21   Choice of Access Points

**21.30J2  Variant title.** If considered necessary for access, *make an added entry for any version of the title* (e.g., cover title …) *that is significantly different from the title proper*.

## RDA
## 2.3  Title

### 2.3.6.3 Recording Variant Titles

Record variant titles that are *considered to be important for identification or access* applying the basic instructions on recording titles given under **2.3.1**

# Abbreviations

## AACR2

**1.2B1.** Transcribe the edition statement as found on the item. Use abbreviations as instructed in appendix B and numerals as instructed in appendix C.

## RDA

**2.5.1.4.** Transcribe an edition statement as it appears on the source of information.

*No instruction to abbreviate.*

**Appendix B Abbreviations**
**B.4. Transcribed Elements**

For transcribed elements, use only those abbreviations found in the sources of information for the element.

# Statement of responsibility

## AACR2

**1.1F7.** *[4 conditions when you do record titles of nobility, address, etc.]*

... Otherwise, omit all such data from statements of responsibility.

## RDA

**2.4.1.4.** Transcribe a statement of responsibility in the form in which it appears on the source of information. Apply the general guidelines on transcription given under **1.7.**

*no instructions to omit data in 1.7*

**2.4.1.4.** *Optional Omission*

Abridge a statement of responsibility only if it can be abridged without loss of essential information.

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# Place of publication, distribution, etc. (AACR2 1.4D4; RDA 2.8.2)

Source has following information:
Blackwell Publishing, 2008
Malden, MA; Oxford; Victoria, Australia; Toronto

AACR2 -- if catalogued in Australia (first place + place in home country)
Malden, Mass. ; Victoria, Australia : Blackwell Publishing, 2008.

AACR2 -- if catalogued in England (first place + place in home country)
Malden, Mass. ; Oxford : Blackwell Publishing, 2008.

AACR2 -- if catalogued in Canada (first place + place in home country)
Malden, Mass. ; Toronto : Blackwell Publishing, 2008.

RDA (only first place recorded is required)
Malden, MA :  Blackwell Publishing, 2008.

# Rule of three

**AACR2**

**21.6B and 21.6C**

*distinctions are made when two, three or four or more persons or bodies share responsibility*

**21.6B1.** If, in a work of shared responsibility, principal responsibility is attributed ... to one person or corporate body, enter under the heading for that person or body ... Make added entries under the headings for other persons or bodies involved if there are not more than two.

**RDA**

*no instructions to limit the number of access points*

# New Elements: Bibliographic Data

- Content type (MARC 336)
  (notated music, text, spoken word, still image, etc.)

  336 ## $a text $2 marccontent

- Media type (MARC 337)
  (audio, computer, microform, video, etc.)

  337 ## $a video $2 marcmedia

- Carrier type (MARC 338)
  (audio disc, audio reel, audio tape, etc.)

  338 ## $a audio disc $2 marccarrier

# New Elements: Authority Data (Attributes of Names)

- Special Coded Dates (MARC 046)

  046 ## $f 1899 $g 1961

- Associated Place (MARC 370)

  370 ## $a Toronto, Ont. $b Surrey, B.C.

- Address (MARC 371)

  371 ## $a Box 2415 $b Edmonton $c Alta.
  $d Canada $e T5J 2S5

# New Elements: Authority Data (Attributes of Names)

- Field of Activity (MARC 372)
  372 ## $a scientist

- Affiliation (MARC 373)
  373 ## $a Faculty of Biological Science, Leeds University, $s 2000 $t 2005

- Occupation (MARC 374)
  374 ## $a writer $a literature professor

# New Elements: Authority Data (Attributes of Names)

- Gender   (MARC 375)
  375 ## $a male $2 [code for RDA list]


- Family Information (MARC 376)
  376 ## $a Dynasty


- Associated Language (MARC 377)
  377 ## $a rus $a eng

| AACR2 | RDA |
|---|---|
| Tremblay, Michel, 1942- | Tremblay, Michel, 1942- <br> Occupation: writer |
| Tremblay, Michel, 1947- | Tremblay, Michel, 1947- <br> Field of Activity: pin collector |
| Tremblay, Michel, 1953- | Tremblay, Michel, 1953- <br> Occupation: photographer |
| Tremblay, Michel, 1954- | Tremblay, Michel, 1954- <br> Affiliation: HEC Montréal |
| Tremblay, Michel, 1964- | Tremblay, Michel, 1964- <br> Associated Place: Saskatchewan <br> Affiliation: Saskatchewan Agriculture and Food |

Source: Daniel Paradis (2009)

# Examples

# Statement of responsibility: more than three persons, bodies, etc. (AACR2 1.1F5, RDA 2.4.1.5)



CINQUEFOIL
New work from five Ottawa poets

Mark Frutkin
Rebecca Leaver
Seymour Mayne
Susan Robertson
Nicola Vulpe
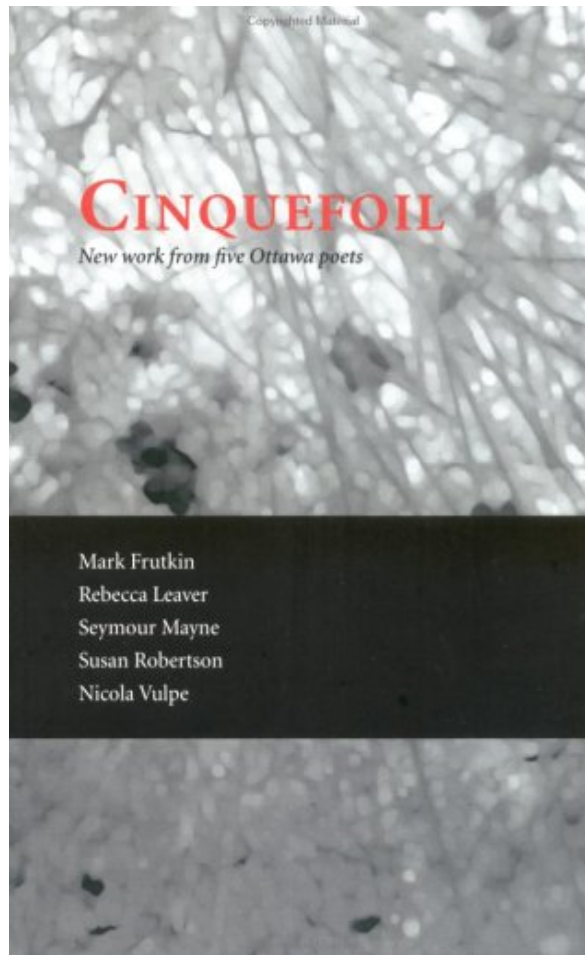
# AACR2

245 $a Cinquefoil : $b new work from
        five Ottawa poets / $c Mark
        Frutkin ... [et al.]

260 $a [S.l.] : $b [s. n.], $c 2003.

700 $a Frutkin, Mark, $d 1948-

# RDA

100 $a Frutkin, Mark, $d 1948-

245 $a Cinquefoil : $b new work from five
      Ottawa poets / $c Mark Frutkin,
      Rebecca Leaver, Seymour Mayne, Susan
      Robertson, Nicola Vulpe.

260 $a [Place of publication not identified] :
      $b [Publisher not identified], $c 2003.

700 $a Leaver, Rebecca
700 $a Mayne, Seymour, $d 1944-
700 $a Robertson, Susan
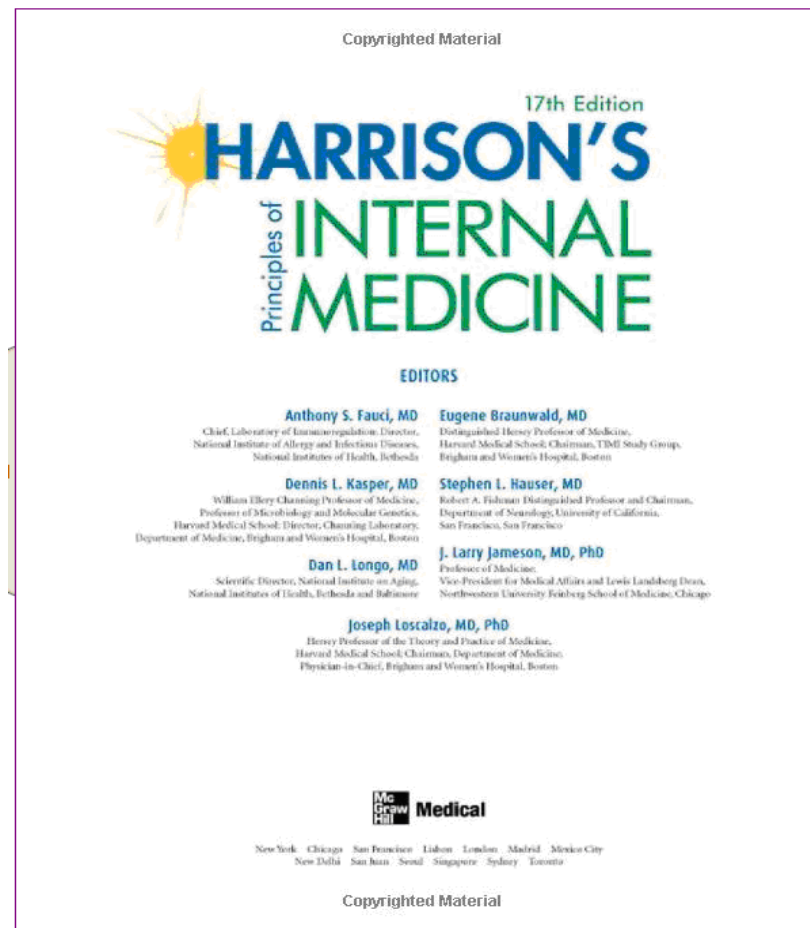700 $a Vulpe, Nicola, $d 1954-

# RDA with alternative

100 $a Frutkin, Mark, 1948-

245 $a Cinquefoil : $b new work from five Ottawa poets / $c Mark Frutkin [and four others].

260 $a [Place of publication not identified] : $b [Publisher not identified], $c 2003.

# Statement of responsibility: more than three persons, bodies, etc. (AACR2 1.1F5, RDA 2.4.1.5)

7 editors

# AACR2

245 $a Harrison's principles of
     internal medicine / $c
     editors, Anthony S. Fauci …
     [et al].

250 $a 17th ed.

700 $a Fauci, Anthony S., $d 1940-

# RDA

245 $a Harrison's principles of internal medicine /
$c editors, Anthony S. Fauci, Eugene Braunwald, Dennis L. Kasper, Stephen L. Hauser, Dan L. Longo, J. Larry Jameson, Joseph Loscalzo.

250 $a 17th edition

700 $a Fauci, Anthony S., $d 1940- $e editor
700 $a Braunwald, Eugene, $d 1929- $e editor
700 $a Kasper, Dennis L. $e editor
700 $a Hauser, Stephen L. $e editor
700 $a Longo, Dan L. $q (Dan Louis), $d 1949- $e editor
700 $a Jameson, J. Larry $e editor
700 $a Loscalzo, Joseph $e editor

# RDA with alternative

245 $a Harrison's principles of internal
    medicine / $c editors, Anthony
    S. Fauci [and six others].

250 $a 17th edition.

700 $a Fauci, Anthony S., $d 1940- $e editor

# Videorecording (DVD)

# AACR2

245 $a Shake hands with the devil
$h [videorecording] : $b the
journey of Roméo Dallaire / $c
director, Peter Raymont ;
producers, Peter Raymont,
Lindalee Tracey.

300 $a 1 videodisc (56 min.) :
$b sd., col. ; $c 4 3/4 in.

538 $a DVD.

# RDA

245 00 $a Shake hands with the devil : $b the journey of
        Roméo Dallaire / $c director, Peter Raymont ;
        producers, Peter Raymont, Lindalee Tracey.

300 ## $a 1 DVD video (56 min.) : $b colour, sound ;
      $c 12 cm

336 ## $a two-dimensional moving image $2 marccontent
337 ## $a video $2 marcmedia
338 ## $a videodisc $2 marccarrier

538 ## $a DVD.

700 ## $a Raymont, Peter, $e director, $e producer
700 ## $a Tracey, Lindalee, $e producer

# Music CD
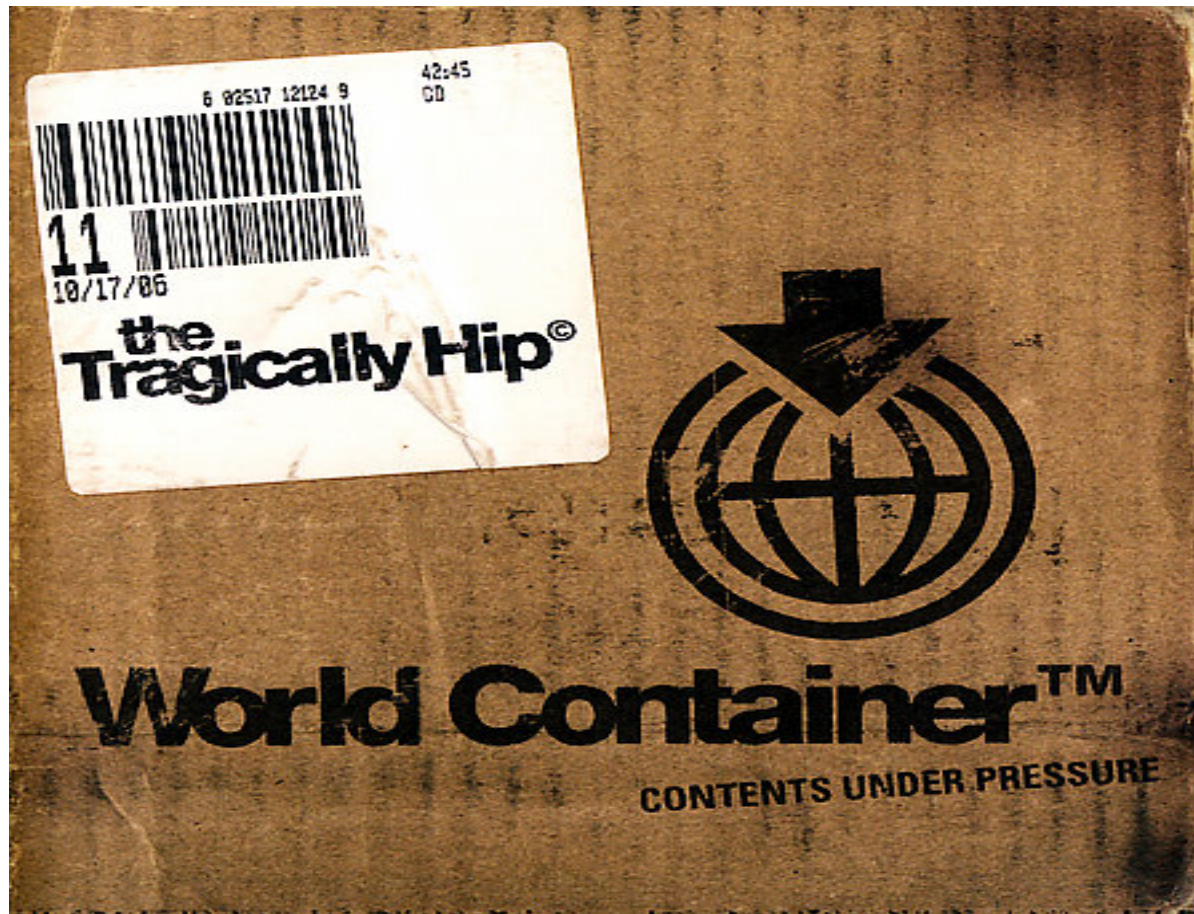
# AACR2

110 $a Tragically Hip (Musical group)

245 $a World container $h [sound recording]

300 $a 1 sound disc : $b digital ; $c 12 cm

500 $a Compact disc

# RDA

110 $a Tragically Hip (Musical group)

245 $a World container

300 $a 1 audio disc : $b digital, stereo ;
        $c 12 cm.

336 $a performed music $2 rdacontent
337 $a audio $2 rdamedia
338 $a audio disc $2 rdacarrier

# Relationships between person/family/corporate body and resource

**Authorized access point:**

```
100 $a Lindgren, Astrid, $d 1907-2002.
240 $a Pippi Långstrump. $l English
245 $a Pippi Longstocking / $c Astrid
    Lindgren ; translated by Tiina Nunnally.
700 $a Nunnally, Tiina, $d 1952- $e translator.
```

Source: Barbara Tillett (2010)

# Relationships between resources

**Authorized access point:**

```
100 $a Brown, Dan, $d 1964-
240 $a Digital fortress. $l
    French
245 $a Forteresse digitale.
700  $i Translation of $a Brown,
    Dan, $d
        1964-  . $t Digital
```

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# Relationships between resources

**Structured description:**

```
100     $a Brown, Dan, $d 1964-
240     $a Digital fortress $l
French
245 $a Forteresse digitale
*500 $a Translation of: Digital
   fortress /
      Dan Brown. -- 1st ed. --
New York : St.
```

# Relationships between resources

**Unstructured description and three identifiers:**

```
245 00 $a Journal of professional
                counseling,
   practice, theory, &
   research.
780 00 $t TCA journal $x 1556-
   4223 $w
      (DLC) 93645762 $w (OCoLC)
```

# Relationships between one person, etc. and another person, etc.

**Authorized access point:**

```
100  $a Snodgrass, Quintus Curtius,
   $d
      1835-1910
500  $a Clemens, Samuel, $d 1835-1910
     $i real identity
```

Source: Barbara Tillett (2010)

# A new format for a new standard

- written and delivered as an online tool

- online tool also delivers additional functionality

- easier to use, easier to teach

- individual or collaborative use

- efficiency and customization
  - more people at different levels of expertise can use it
  - easier to promote consistent application of standards
  - flexible and customizable for different communities of users

# JSC Working Documents

http://www.rda-jsc.org/working1.html

- RDA Table of Contents
- Changes from AACR2
- Issues deferred until after the 1$^{st}$ release
- RDA Elements Table

# RDA Online/ Implementation

- ILS: Input templates for cataloguing
  - Listing the elements and links to RDA guidelines (depends on the ILS vendor)
- Workflows in RDA Online
  - Step-by-step process with links to RDA guidelines
  - RDA Online wizard to create your own "workflows"
  - Share "workflows"
  - Ability to annotate instructions

# RDA Toolkit – A Guided Tour

- Videos of webinars presented by ALA Publishing

  http://rdaonline.org/rdaVideos.html

# Changes for systems

- New MARC fields for RDA elements
  - Content type, carrier type, media type
  - Added relator terms (Appendix I)
  - Authority format fields for dates, places, etc., for names
  - MARC 21 Format Changes to Accommodate RDA

  http://www.loc.gov/marc/formatchanges-RDA.html

# More system changes

- Input/verification functions (import/export)

- Indexes for new data elements

# "Legacy" records

- Existing records generally will not need changing (exceptions: 'global updating' for Bible, Department)

- MARC 21 encoding standard

# RDA Online and Local System

- Potential for integration with library systems

- Initially view in parallel through Web connection

# RDA training

- LAC will make training and documentation available on the web for reuse

- FAQ on LAC's website http://www.collectionscanada.gc.ca/cataloguing-standards/040006-1107-e.html

- Different models for delivery of training under consideration (working with Canadian Committee on Cataloguing)

  e.g., web seminars, "train the trainer"

# RDA Implementation

June 2010: First Release

Throughout 2010:
Testing, Translation, Training, Documentation

2011: Implementation