RDA Updates, *March 2021-March 2022*

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Agenda

- RDA updates
  - New RSC documents; new RDA working groups
  - RDA/MARC WG: approved MARC proposals
  - RDA & BIBFRAME mapping to come
- Official RDA Toolkit, March release (March 24th, 2022)
  - RDA: Entities and Guidance
  - Updated community resources and documents
- Community update: PCC RDA test
  - LC-PCC PS & MGD (Metadata Guidance Documentation) with examples
- Welcome CEAL to participate

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New RDA documents

- Implementing the Collections Model in RDA

- Realignment of Expression to Expression Relationship Elements

- Revision of Expression: relief type (now Expression: relief representation)

- 3R Project Final Report

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New RDA working groups

- Extent Working Group, 2022-2023
  - Improve the RDA standard for elements that use measurements, primarily extent and dimensions elements
- Official Languages Working Group, 2022-2023
  - Examine the concept of "official language" for corporate bodies in RDA
- Place/Jurisdiction Working Group, 2022-2023
  - Examine the concepts of place and jurisdiction (corporate body) and their associated definitions and instructions in RDA
- Religions in RDA Working Group, 2022-2023
  - Expand the non-Christian coverage in RDA
  - Western and Christian bias in the 3R Toolkit report (2019)

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MARC/RDA Working Group

- New MARC proposals were approved by the MARC Advisory Committee in January, 2022
  - Recording Data Provenance in the MARC 21 Authority and Bibliographic Formats
    - Proposed changes: define subfields for data provenance: $7, $5, $z
  - Recording Representative Expressions in the MARC 21 Authority and Bibliographic Formats
    - Proposed changes: define new field 387 (Representative expressions); new 1st indicator values 2 and 3; new 1st indicator 2 in field 384
  - Recording Non-Cartographic Scale Content in the MARC 21 Bibliographic Format
    - 507 - Scale for Visual Materials (NR)

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RDA & BIBFRAME mapping

"The RDA Technical Working Group will be working on the RDA and BIBFRAME mapping and the mapping has a target date of December 2022."

– *Damian Iseminger*, RDA Technical Team Liaison Officer

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Official RDA Toolkit

- Both global vs. local considerations (Glocalization)
  - Official RDA is an international standard with Options which may be governed by policy statements or application profiles provided by cataloging agencies.
- RDA supports linked data
  - An Entity & relationship model (based on IFLA LRM)
    - Entities are described using elements
  - RDA Toolkit: entities, elements, vocabularies, guidances and instructions
  - RDA Registry: linked data and Semantic Web representations of the elements (open access)
- Toolkit development goals
  - Develop a tool to support application profiles or specialized communities
  - Develop a generic mapping tool, visual browser, etc.

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- Profile features are in the dark blue bar
  - Original Toolkit, Help, Language of text and/or site (here English) and Feedback form
- Content tabs in the lighter blue bar
  - Entities, Guidance, Policies and Resources
  - Obtain links and citation numbers to specific parts of instructions when highlighting text

Entities

- Based on IFLA Library Reference Model (LRM) entities
- Separate pages for each
- Related elements linked at the bottom of each page

ENTITIES

RDA Entity
Work
Expression
Manifestation
Item
Agent
Person
Collective Agent
Corporate Body
Family
Nomen
Place
Timespan

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Structure of Element Pages

- Name of element
- Definition and scope
  - Element reference
- Prerecording
  - This element may refer to …
- Recording
  - Four recording methods
- Related elements, as applicable: Broader, Narrower, Inverse

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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

Guidance

- Topical approach

  - Separate from instructions

  - For background information, new concepts, and instructions that apply to more than one element

- May be referenced in the element pages

  - Entities → Manifestation → Recording → **Describing a manifestation** (linked to Guidance → Resource description)

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Entity boundaries

- RDA definition: An RDA entity boundary is the set of criteria that is applied by an agent who creates metadata to *determine if a description of a new RDA entity is required*.
- Two types
  - **Absolute boundary** of the entity: determined by characteristics of the entity that reflect the physical world: Item, Manifestation, Person, Place and Timespan
  - **Relative boundary** of the entity: determined by bibliographic and cultural conventions
    - Some element values where a difference may or may not require a new entity description within a given implementation, for example, Manifestation: *date of manufacture*

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The boundary of a specific entity

For instructions on the boundary of a specific entity, see:

- Agent. Entity boundary
- Collective Agent. Entity boundary
- Corporate Body. Entity boundary
- Expression. Entity boundary
- Family. Entity boundary
- Item. Entity boundary
- Manifestation. Entity boundary
- Nomen. Entity boundary
- Person. Entity boundary
- Place. Entity boundary
- RDA Entity. Entity boundary
- Timespan. Entity boundary
- Work. Entity boundary

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Work entity boundary

- A (static) work: a significant difference in:
  - Work
    - Subject or an element subtype; related agent of work or an element subtype; elements of an expression whose content differs from another realization of a work as the result of a change in genre or literary form, editorial policy, style; extension plan
  - Expression: aggregates for the aggregating expression
- A diachronic work: a significant difference in:
  - Work: frequency or ISSN
  - Manifestation: carrier type
  - Characteristics of the plan for embodiment of the work over time

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Diachronic work entity boundary

- Preferred title of work is in a language and script that divides text into words. There is a difference in a value of Work: preferred title of work that is a change in the first five words following an initial article, if any

- Preferred title of work that is a change in meaning or an indication of a different subject

- Preferred title of work that is a change in a value of Corporate Body: name of corporate body

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Community guidance & resources

- In RDA
  - Policy statements
    - Decisions for a 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
  - Application profile
  - LC-PCC Metadata Guidance Documentation
    - With examples in MARC and BIBFRAME

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Policies

- Currently 3 PS posted in draft form
- Also access through PS set selection menu

Entities > Work

Work

Definition and Scope

A distinct intellectual or artistic creation, that is, the intellectual or artistic content.

creator corporate body of work

Select Policy Statement Set (2)
LC-PCC PS (7) ⌄

RDA Toolkit + related PS

Definition and Scope

A corporate body who is responsible for creating a work.

A creator of work includes an agent who is jointly responsible for the creation of a work either by performing the same role as another agent, such as in a collaboration between two writers, or by performing a different role, such as in a collaboration between a composer and a lyricist.

👁 Element Reference

Prerecording

A creator corporate body of work is a corporate body who is responsible for originating, issuing, or causing to be issued a work in a specific category.

CONDITION

A work is of an administrative nature that deals with any of the following aspects of a corporate body:

- its internal policies, procedures, finances, or operations
- its officers, staff, or membership (e.g., directories)
- its resources (e.g., catalogues, inventories)

OPTION

Record a value for a corporate body.

👁 Example

LC-PCC   Send to Back

LC/PCC practice: Applicability: In judging whether a corporate body should be considered the creator corporate body of work, check the following criteria:
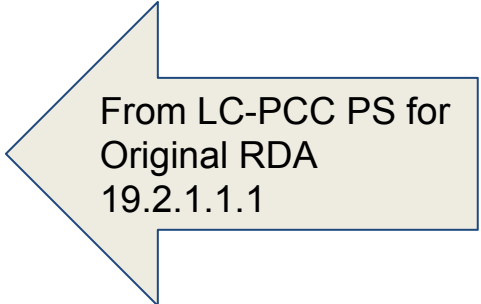
1. Is the corporate body responsible for originating, issuing, or causing the work to be issued (the concept referred to in AACR2 as "emanation")? Consider the corporate body responsible if one of the

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LC-PCC   Send to Back

LC/PCC practice: Apply the option when the work deals with the body itself.

The words "administrative nature" indicate works dealing with the management or

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From LC-PCC PS for Original RDA 19.2.1.1.1

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18

Resources

- Community resources
  - New and to be decided
  - What does it mean to CEAL community?

Application profiles

- Guidance > Application profiles
- An *application profile* specifies the entities, elements, and vocabulary encoding schemes that are expected in a set of metadata that meets the functions and requirements of an application that uses the metadata.
- An RDA application profile limits the specification to RDA entities, elements, and compatible vocabulary encoding schemes. An RDA application profile specifies:
- Application profiles in RDA toolkit
  - RDA specifies basic application profiles for resource entities in the guidelines for Minimum description of a resource entity and Coherent description of an information resource. These can be elaborated by policy statements.
-

Application profiles for linked data

- The RDA registry provides IRIs for every RDA entity, element, vocabulary encoding scheme, and vocabulary term.
- Registry IRIs may be used in an application profile for linked data created in Resource description framework (RDF).

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Implementation scenarios

Guidance > 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

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Community update:

PCC RDA Test

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PCC RDA Test

- PCC RDA Communications Committee
  - Feedback Form
  - Public Tracking Spreadsheet
- Task Group to Test the Official RDA Toolkit (charge, Feb. 2022)
- Test
  - Official RDA Toolkit
  - LC-PCC Policy Statement
  - LC-PCC RDA Narrative Metadata Guidance Documentation
    - PCC won't implement before October 2022.

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Example: major changes requiring a new serial work

- **Official RDA Toolkit:** Entity & Guidance
  - **Entity**: Work. Entity boundary: conditions and options
  - Guidance > Entity boundaries
  - Guidance > Diachronic works. Transformation boundaries (also known as WEM lock): conditions and options
- **LC/PCC PS:** follow LC-PCC PS for the OPTIONS to create a new Work under the following Entity boundary CONDITION
- **RDA Narrative MGD** (Metadata Guidance Documentation)
  - Serial Work and Integrating Work Decisions
  - Relationships WEMI-WEMI

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Example: major changes requiring a new serial work (2)

- **LC/PCC Practice**
    - When deciding to update an existing Work or create a new Work, compare the title on that issue or part to the title proper in the MARC 245 field in the serial bibliographic record and not against the variant titles in the MARC 246 fields.
- **CONSER Cataloging Manual,** Module 16.2.

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A new serial work: relationships

MARC

245 04 **$a The Academy of Management journal**.
785 0**1 $t Academy of Management review**

245 04 $a **The Metal worker, plumber, and steam fitter.**
785 0**5 $t Sheet metal worker**

BIBFRAME or RDA/RDF

BIBFRAME ontology
The Academy of Management journal
"**continued in part by**" *Academy of Management review*

RDA/RDF property
The Metal worker, plumber, and steam fitter
"**is absorbed in part by**" *Sheet metal worker*

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Example: Regular-print reprints of serials
MGD WEMI-WEMI, CCM17.7, CEG-L4

MARC

245 10 故宮週刊.
245 10 Gu gong zhou kan.

775 08 $i **Reproduction of**: $t 故宮週刊

775 08 $i **Reproduction of**: $t Gu gong zhou kan

BIBFRAME

```
<bf:Title >
   <bf:mainTitle >Gu gong zhou kan</bf:mainTitle>
   <bf:mainTitle xml:lang="zh-hani" >故宮週刊</bf:mainTitle>
</bf:Title>


<bflc:relationship>
  <bflc:Relationship>
    <bf:relatedTo>
       <bf:Instance>
         <bf:Title>
           <bf:mainTitle>Gu gong zhou kan</bf:mainTitle>
           <bf:mainTitle xml:lang="zh-hani" >故宮週刊</bf:mainTitle>


         <bflc:relation>
           <bflc:Relation
rdf:about="http://id.loc.gov/entities/relationships/reproductionof">
             <rdfs:label>Reproduction of</rdfs:label>
           </bflc:Relation>
         </bflc:relation>
```

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- Welcome CEAL colleagues to participate in PCC RDA test.
- Provide your feedback concerning the Official RDA Toolkit, LC-PCC Policy Statements and Metadata Guidance Documentation.
- Let's think globally and act locally!

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References

- <u>RSC presentations</u>
  - Kathy Glennan, <u>Getting ready to use the new RDA</u> (11/21)
  - Elesa Sze, Getting a handle on concepts and jargon in the new RDA (2/22)
  - Honor Moody, <u>Entity Boundaries: Fixed or Fluid?</u> (11/21)
  - Melissa Parent, Application Profiles: A Deeper Dive (and how not to drown) (3/22)

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More RDA resources

On the RDA Toolkit YouTube channel, watch
- Toolkit demo, July 2021:
  https://www.youtube.com/watch?v=azoBV9GOv-4
  - o Future demos will be announced at
    https://www.rdatoolkit.org
  - ▪ RDA Concepts playlist:
    https://www.youtube.com/c/RDAToolkitVideo/playlists

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