UPDATE ON THE RDA 3R PROJECT

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RDA 3R PROJECT

- RDA Toolkit Restructure and Redesign
  - Started in 2016
  - Toolkit content frozen: April 2017 - end of project
  - Will result in a new RDA Toolkit
    - But not considered a 2nd edition of RDA
    - Much more personalization available
  - Coming June 2018, with an additional rollout by early September
    - Old version of Toolkit will still be available, for at least another year
    - Will need to update policy statements, local decisions, etc.
  - "Official" implementation will likely be sometime after that

REDESIGN

- Creating an interactive, web-based product
  - Working with user experience firm
    - Redesign based on user stories, put forward from the 3R User Group
  - More relevant information on each screen
    - Ability to see policy statements and the instructions at the same time
    - Wider variety of examples – choose which to display
  - New ways to navigate the instructions/chapters
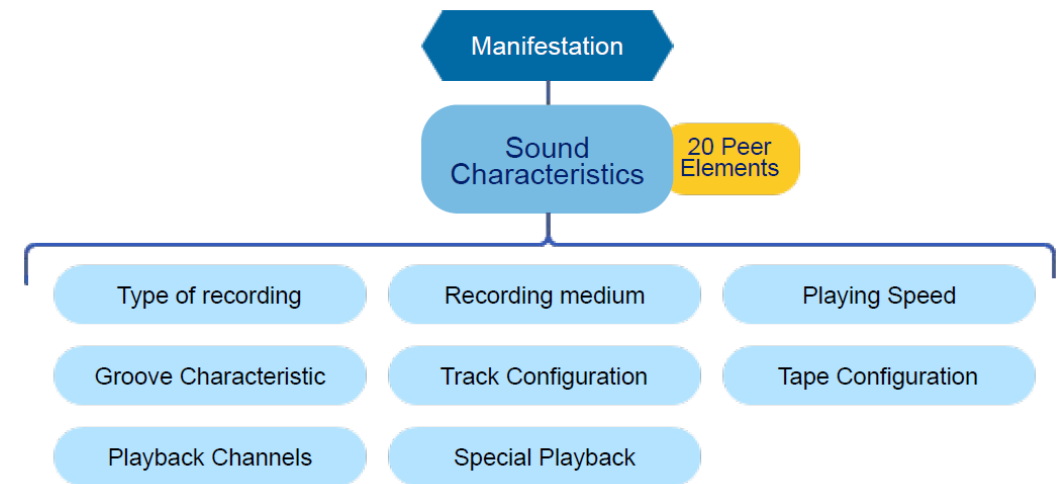- More consistency in wording across instructions

NEW RDA TOOLKIT
SAMPLE NAVIGATION SCREENSHOTS

Entity Chapters

Thumbnails – expanded attributes

RESTRUCTURE

- "Under the hood" work to make updating and maintenance easier
  - Ensures same content for all "flavors" of RDA:
    - Open Metadata Registry
    - RDA Vocabularies
    - RDA Registry
    - RIMMF (RDA in Many Metadata Formats)
    - RDA Toolkit
  - Offers more robust support for translations

WHAT'S THE SAME?

- Most instructions retained, but...
  - Relocated / Reorganized
    - Maybe no more instruction numbers?!
  - Reasons for recording a piece of information may change
    - Including placement at a different WEMI level
      (*Work, Expression, Manifestation, Item*)
    - Shouldn't have a significant impact on creation of MARC21 records
  - More flexibility in choosing how to record a piece of information
    - Enables RDA implementation outside of MARC
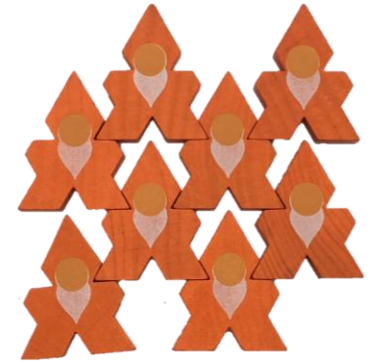
WHAT'S DIFFERENT?

- Two primary sections, each with multiple chapters
  - Entities
  - General guidance
- Changes deriving from IFLA Library Reference Model
  - New entity chapters
  - Definition of *Person* revised
- More and better examples
  - Variety of example types
- No appendices – that content will move elsewhere
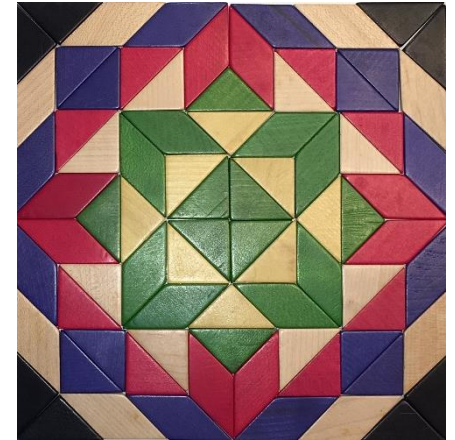
NEW CHAPTERS IN RDA

GENERAL CHAPTERS

- Introduction to RDA
- User tasks
- Pre-cataloging decisions
  - Type of description
  - Facsimiles and reproductions
- Provenance
- Sources of information
- Recording methods
  - Formerly known as "the 4-fold path"
- Aggregates

RECORDING METHODS

- Chapters will present four methods for capturing data
  – affects instructions & examples
  - Unstructured description
  - Structured description
  - Identifier
  - IRI (Internationalized Resource Identifier)
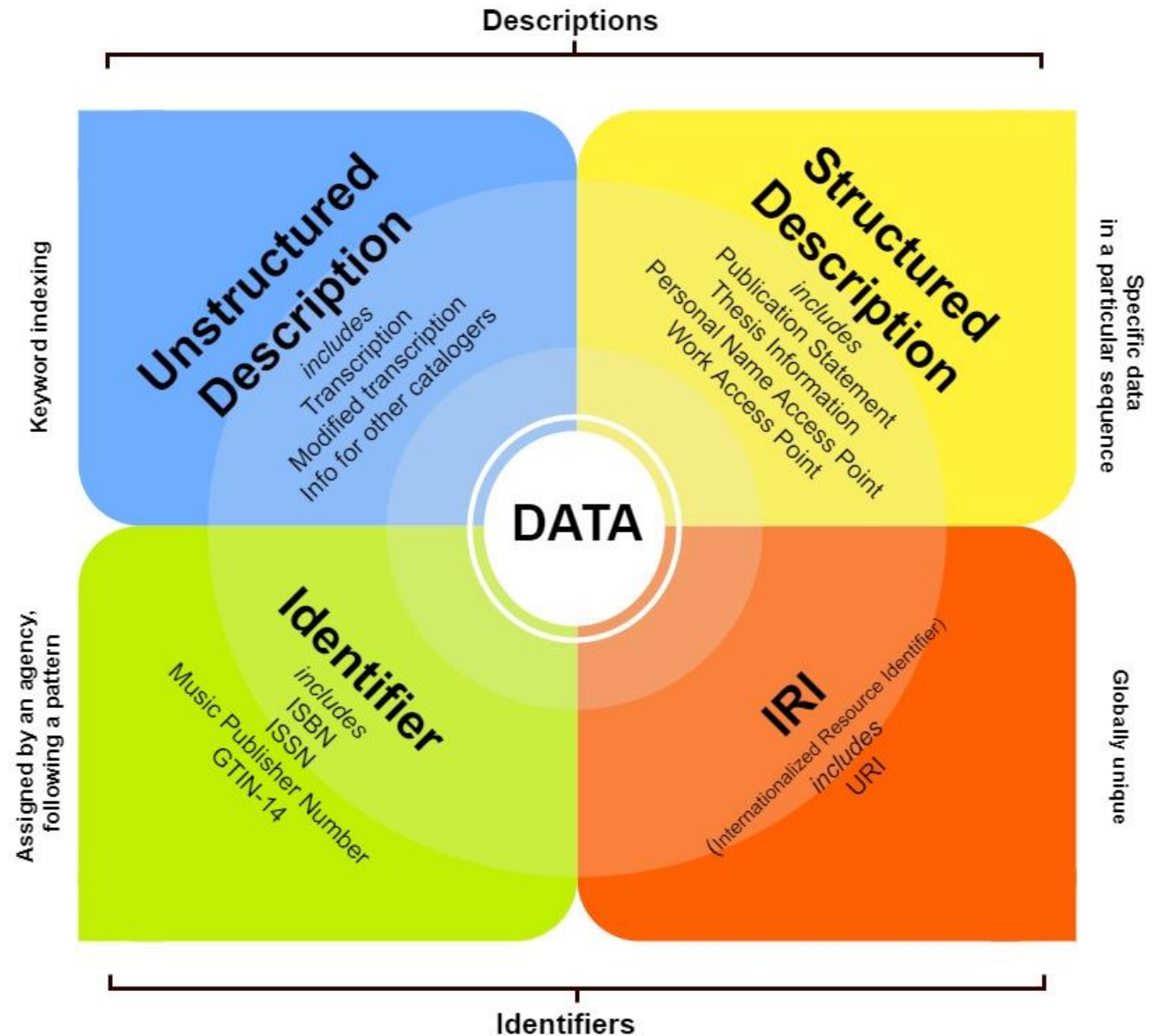
AGGREGATING WORK

- A plan for bringing together distinct *expressions* into one or more *manifestations* – **not** the contents
  - The creator of the aggregating work identifies/creates the plan
    - "I'm going to bring together my favorite poems and publish them in one volume"
    - "When our firm publishes this novel, we will add illustrations"
    - "We will solicit articles about cataloging and publish them quarterly – maybe forever!"
  - For static works, the plan can generally be ignored – just catalog the results
  - For a yet-to-be-complete work, the plan takes on more importance
- Realized in an aggregating expression
  - Embodied as the selection, sequence and wrapping of the separate expressions

AGGREGATE MANIFESTATIONS: COLLECTIONS OF EXPRESSIONS

- More than one distinct *work/expression*

- Usually similar in type and/or genre

- None considered subordinate

- Examples
  - Anthology
    - A treasury of great mysteries / edited by Howard Haycraft and John Beecroft
  - Issue of a journal
    - American Libraries, November/December 2017
  - Compilation CD
    - Glenn Miller : a legendary performer

AGGREGATE MANIFESTATIONS: AUGMENTATIONS

- One main *work/expression*, with at least one other *work/expression* that supplements it

- Additional *work/expression* may or may not be significant enough to warrant distinct bibliographic identification

- Examples
  - Introduction, not by the author

    The birth of NASA : the diary of T. Keith Glennan / with an introduction by Roger D. Launius
  - Index

    The complete poetical works / Lord Byron; general index by Carol B. Pearson
  - Illustrations

    Little women / Louisa May Alcott ; illustrated by Louis Jambor

AGGREGATE MANIFESTATIONS: PARALLEL EXPRESSIONS

- More than one distinct (language) *expression* of the same work

- Examples
  - Publication conceived as bilingual from the start

    Retirement income : recent developments and proposals / Francis Kessler
    Text in English and French on inverted pages

  - Text in the original language with a translation

    Orations / Aelius Aristides; edited and translated by Michael Trapp
    Parallel texts in Greek and English

  - DVD with a choice of spoken and/or subtitle languages

    Holy hell
    In English with optional subtitles in Arabic, Chinese (traditional and simplified), Danish, Dutch, English, Finnish, French, German, Italian, Korean, Portuguese (Brazilian and European), Spanish (Latin America and Castilian), Swedish

NEW AGGREGATING WORK?

- When there's a static work
  - New manifestation = new aggregating work *if* the <u>content</u> changes
    - Different expressions (e.g., the same musical works, but with different performers)
    - Another work is added
  - But not necessarily if the carrier changes
- When there's a work with content added over time
  - New manifestation = new aggregating work *if* the <u>plan</u> changes
    - Could include frequency, content type, language, and/or carrier type
      - Boundary decisions based on local cataloging policies
  - Not a new aggregating work when only new content is added

NEW CONCEPT: DIACHRONIC WORKS

- Planned to be embodied over time
- *Work* changes over time
  - Revision / replacement – Single expression
    - May be done at regular intervals
  - Additions / accumulations – Successive expressions
    - Previous content retained
- New categories planned
  - Integrating monographic work
  - Sequential monographic work
  - Integrating continuing work
  - Serial work (sequential continuing work)

ASPECTS OF DIACHRONIC WORKS

- Extension of content
  - Essential
    - If the extension is not completed, the whole work loses integrity
  - Inessential
    - If/when the extension terminates, the cumulative issued parts are unaffected
- Extension mode
  - Integration of added content
  - Successive release of new content
- Termination of content
  - Determinate (known): a pre-determined end
  - Indeterminate (unknown): could continue indefinitely

DIACHRONIC WORKS

Extension of Content	Extension Mode	Termination of Content
☑ **Essential**	☑ **Integration**	☑ **Determinate**
☐ Inessential	☐ Succession	☐ Indeterminate

Kit with pieces issued monthly – to be assembled into a model

Build R2-D2 | 1:2 Scale

Pay-as-you-build option
Premium 25 months subscription at $69.99/ month
Standard 25 months subscription at $64.99/ month

DIACHRONIC WORKS

Extension of Content	Extension Mode	Termination of Content
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Conference website

ALA *Annual*
CHICAGO
CONFERENCE & EXHIBITION JUNE 22–27, 2017

DIACHRONIC WORKS

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☐ Inessential	☐ Succession	☑ **Indeterminate**

Online news website

DIACHRONIC WORKS

Extension of Content	Extension Mode	Termination of Content
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Ongoing wiki or blog

◯NASIG BLOG

Coyle's InFormation

DIACHRONIC WORKS

Extension of Content	Extension Mode	Termination of Content
☑ **Essential**	☐ Integration	☑ **Determinate**
☐ Inessential	☑ **Succession**	☐ Indeterminate

Dictionary issued in successive parts

Published in 4 volumes, 1882-1883

THE

IMPERIAL DICTIONARY

OF

THE ENGLISH LANGUAGE:

A COMPLETE ENCYCLOPEDIC LEXICON, LITERARY, SCIENTIFIC, AND TECHNOLOGICAL.

BY

JOHN OGILVIE, LL.D.,

DIACHRONIC WORKS

Extension of Content	Extension Mode	Termination of Content
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Conference video diary

*Video Testimonials
Recorded during ALA Midwinter 2016*

WHY
ALCTS
?

DIACHRONIC WORKS

Extension of Content	Extension Mode	Termination of Content
☑ **Essential**	☐ Integration	☐ Determinate
☐ Inessential	☑ **Succession**	☑ **Indeterminate**

???

DIACHRONIC WORKS

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Annual report

RSC **RDA** Steering Committee

Annual Reports

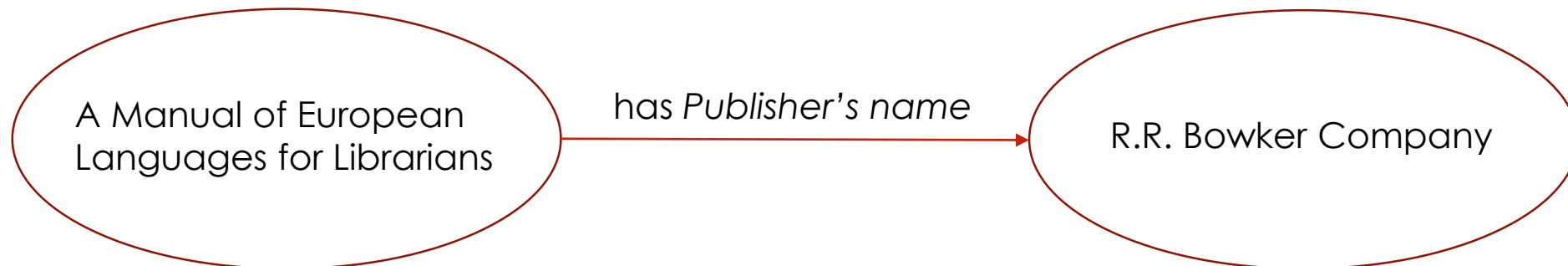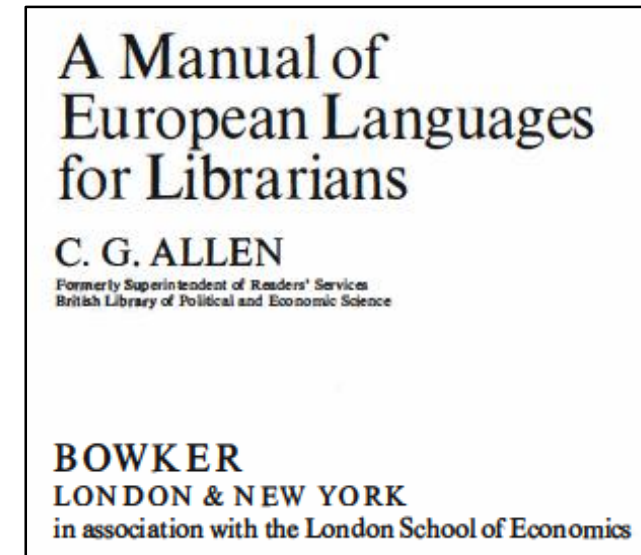# IFLA LIBRARY REFERENCE MODEL (IFLA-LRM)

Consolidation of the separately developed IFLA conceptual models:
FRBR, FRAD, FRSAD

NEW LRM ENTITIES ADDED TO RDA

- *Agent*
  - One or more real human beings: able to create, publish, own, etc.
- *Collective agent*
  - A superclass of the RDA entities Corporate body and Family
- *Nomen*
  - A label or name for an entity (which is then associated with entity itself)
- *Place*
  - A given extent of space, although the boundaries may change over time
- *Time-span*
  - A duration of time, which can be very specific or can be a broad range

ATTRIBUTE OR RELATIONSHIP?

- Emphasis on relationships over attributes
  - Example: *Publisher's name*
    - Transcribed from the manifestation
      (with or without applying "transcription rules")

    and/or
    - Presented as a relationship

A Manual of
European Languages
for Librarians

C. G. ALLEN
Formerly Superintendent of Readers' Services
British Library of Political and Economic Science

BOWKER
LONDON & NEW YORK
in association with the London School of Economics

A Manual of European Languages for Librarians → has *Publisher's name* → R.R. Bowker Company
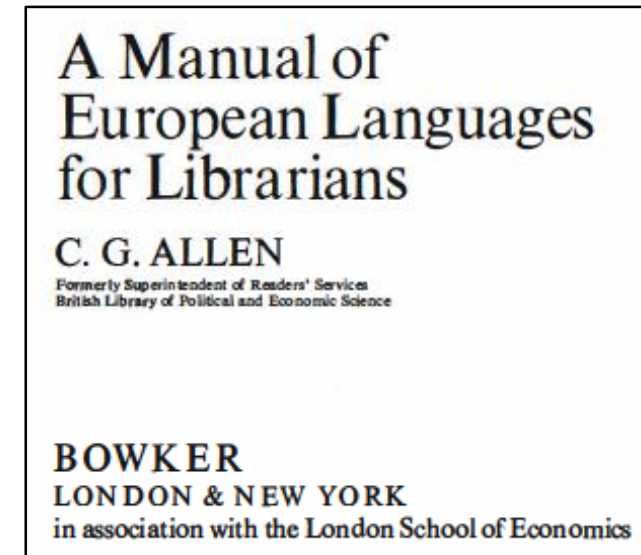
MANIFESTATION STATEMENTS

- Literal transcriptions from the manifestation
  - Example:
    Manifestation title and responsibility statement

```
A Manual of
European Languages
for Librarians
C. G. ALLEN
```

But...

- Modified transcription considered "recording" – not a manifestation statement

    Title: `A manual of European languages for librarians`

    Statement of Responsibility: `C.G. Allen`

REPRESENTATIVE EXPRESSION ELEMENTS

- Certain *expression* elements closely associated with the "original" *work*
    - Language
    - Medium of performance
    - Key
    - Intended audience
- One or more instances of each of these can be identified as a work attribute
    - Shakespeare's Hamlet: Language = English
    - Beethoven's Emperor Concerto:
        - Medium of performance = piano, orchestra
        - Key = E♭ major

REVISED ENTITY: PERSON

- A subclass of LRM's *Agent*

- Significant change from FRAD in the model for non-human personages
  - New scope excludes personas, spirits, fictitious characters, etc.

- But still important to associate the name (or *Nomen*) with the *Manifestation*
  - Presenting "Geronimo Stilton" as the author doesn't make him an *Agent* (which is required for *Person*)
  - Instead, it's a type of pseudonym
    - Sometimes the real human being behind the *Nomen* can be identified, sometimes not
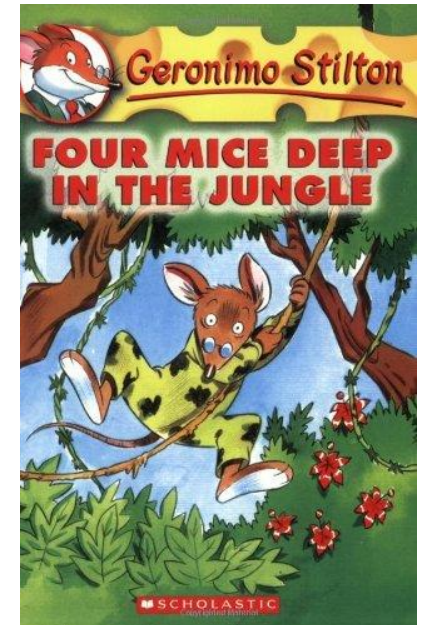
- What about an animal performer?
  - Not an *Agent*, but doing <u>something</u>
  - Has a *Nomen*
  - Need to relate that *Nomen* to the *Manifestation* where it is used
    - Through a *Manifestation statement* or Statement of Responsibility
    - Add an access point
    - May extend the "association" relationship
- **Note:** This is not about subjects

MORE INFORMATION

- RDA Toolkit/3R Project website
  - http://www.rdatoolkit.org/3Rproject
- RDA Steering Committee – Presentations
  - http://www.rda-rsc.org/rscpresentations
- IFLA Library Reference Model
  - https://www.ifla.org/files/assets/cataloguing/frbr-lrm/ifla-lrm-august-2017.pdf
- Forthcoming joint paper:
  - ISSN/RSC Discussion paper: Issues on IFLA-LRM alignment for Serials and Other Continuing Resources
- Email me: kglennan@umd.edu

QUESTIONS?