



Program for
Cooperative Cataloging

BIBCO / CONSER / NACO / SACO

Moving Towards Implementing Official RDA

Presented by Adam Baron

PCC Participants' Meeting

February 15, 2024

Overview

- [Final Report of the PCC Test of the Official RDA Toolkit](#)
 - Prepared by the PCC Task Group to Test the Official RDA Toolkit
- [Phase 1: PCC Introductory RDA Training](#)
 - Developed by the SCT RDA Training Task Group: Monographs
- [PCC RDA Implementation Task Group](#)

Final Report of the PCC Test of the Official RDA Toolkit

Prepared by the PCC Task Group to Test the Official RDA Toolkit

Purpose of the Test

- To conduct a thorough test of the official RDA Toolkit to ensure that PCC catalogers can use the Toolkit, related LC/PCC Policy Statements (LC-PCC PSs), and Metadata Guidance Documentation (MGDs) to accurately catalog materials in various formats in both MARC and BIBFRAME
- To ensure that LC-PCC Policy Statements and Metadata Guidance Documents work well in the new toolkit before PCC implementation
- To identify possible revisions to policies and guidance, as well as possible training needs

Test Results

- Problems indicate areas where PCC may need to focus on improving documentation and/or developing training

	Number of Comments	Number of Problems Cited
LC-PCC Policy Statements	1522	625
Metadata Guidance Documentation	630	366
RDA Toolkit	530	417
BIBFRAME and Sinopia	472	185

Recommendations

LC-PCC PSs & MGDs

Recommendations

- Spreadsheet of actionable recommendations, questions, and comments for the 625 LC-PCC PS problems and 366 MGD problems shared with Policy, Training, and Cooperative Programs Division (PTCP) at the Library of Congress in July 2023

Actions

- PTCP and LC staff have been actively reviewing feedback from the test
- LC-PCC PSs have been updated in the official RDA Toolkit, with additional updates expected in future releases
- Fewer updates to MGDs but will a separate sub project soon

Recommendations

LC-PCC PSs & MGDs

Specific Actions

- Adding links in LC-PCC PSs to relevant MGDs
- Updating language and terminology in LC-PCC PSs
- Clarifying when or how the LC-PCC PSs should be applied
- Developing an introduction to the LC-PCC PSs
 - Clarifying what “Core” means
 - Providing guidance for how to apply options
- Addressing outstanding policy questions (e.g., mode of issuance and choice of vocabulary encoding scheme)

Recommendations

RDA Toolkit

Recommendations

- Of the 417 RDA Toolkit problems, 124 were marked as “Priority”, including:
 - Straightforward changes
 - Suggestions to improve consistency in wording or structure
 - Feedback on functionality issues that affect users’ ability to find, retrieve, or view instructions or policy statements
 - Significant concerns that should be addressed

Actions

- NARDAC reviewed the 124 priority problems
 - 74 (59.7%) were forwarded to RSC
 - 26 (21%) were sent back to PCC to create proposals
 - 22 (17.7%) were identified as training issues

Phase 1:

PCC Introductory RDA Training

Developed by the SCT RDA Training Task Group: Monographs

Learning Outcomes

- At the end of the introductory training, catalogers will be able to:
 - Identify key changes introduced during the 3R Project
 - Use and navigate the RDA Toolkit
 - Define key vocabulary terms
 - Understand new concepts

Target Audience

- PCC participants
 - Primary: everyday cataloger
 - Secondary: policy makers and specialist catalogers
- Prerequisites:
 - Basic level of cataloging training
- Recommended training:
 - SCT IFLA LRM (<https://www.loc.gov/catworkshop/RDA2020/index.html>)

List of Modules

1. Overview of Phase 1:
Introductory RDA Training
- **Introduction to RDA**
 2. Development and Basics of RDA
 3. Objectives and Principles
Governing RDA
 - **Using the RDA Toolkit**
 4. Getting Started with RDA Toolkit
 5. Navigating RDA Toolkit
 6. Searching RDA Toolkit
 7. Personalizing RDA Toolkit
 - **RDA Terminology and Concepts**
 8. Recording Methods
 9. Data Provenance
 10. Coherent and Minimum
Descriptions
 11. RDA Entities and Elements
 12. Timespan
 13. Nomens and Appellations
 14. Manifestation Statements
 15. Representative Expression
 16. Aggregates
 17. Diachronic Works

Module 1: Overview of Phase 1: Introductory RDA Training



Module 1

Overview of Phase 1: Introductory RDA Training

RDA Training Task Group: Monographs
Standing Committee on Training
December 2023



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Introduction to RDA

Module 2: Development and Basics of RDA

Learning Outcomes

- Summarize key developments in the history of RDA
- Differentiate official RDA from original RDA
- Identify basic and important terms about official RDA, including 3R Project, LRM (Library Reference Model), RDA Registry, etc.

The 3R Project

- The 3R Project was announced in Oct. 2016 and began in 2017. It ended with the release of the official RDA Toolkit on Dec. 15, 2020
- 3R Project: **R**DA, **R**estructure, **R**edesign
- Changes covered in the project:
 - Technology: updated the software, impacting the way RDA instructions are stored, updated, and accessed; the new content management system allows pieces to be reused wherever needed (“boilerplate” language) and works better for developers, translators, and other content providers
 - Content: aligned with IFLA’s LRM

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Introduction to RDA

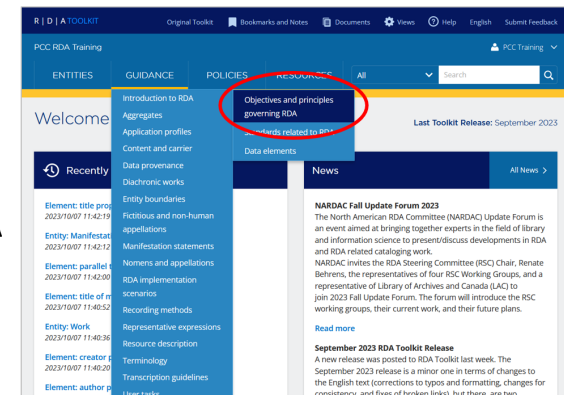
Module 3: Objectives and Principles Governing RDA

Learning Outcomes

- Understand the principles on which RDA is based
- Find more information about RDA's objectives and principles in the Toolkit

Objectives and Principles in RDA

- To find the principles on which RDA is based:
 1. Go to the **Guidance** tab
 2. Select **Introduction to RDA**
 3. Click **Objectives and principles governing RDA**



Using the RDA Toolkit

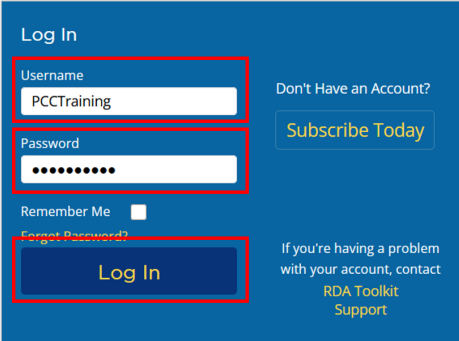
Module 4: Getting Started with RDA Toolkit

Learning Outcomes

- Access the RDA Toolkit
- Log in to the RDA Toolkit
- Create a user profile

Logging In Using Profile Login

1. Enter your profile username.
2. Enter your profile password.
3. Click **Log In**.



The screenshot shows a blue login form titled "Log In". It contains the following elements:

- A "Username" input field containing the text "PCCTraining", highlighted with a red box and the number "1".
- A "Password" input field with masked characters, highlighted with a red box and the number "2".
- A "Remember Me" checkbox, which is currently unchecked.
- A "Log In" button, highlighted with a red box and the number "3".
- A "Forgot Password?" link in red text.
- A "Don't Have an Account?" link with a "Subscribe Today" button below it.
- Support text at the bottom right: "If you're having a problem with your account, contact RDA Toolkit Support".

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Using the RDA Toolkit

Module 5: Navigating RDA Toolkit

Learning Outcomes

- Understand the basic organization of the RDA Toolkit
- Identify the basic structure of entity and element pages
- Browse for RDA elements by entity
- Use various Toolkit features, such as creating links and viewing citation numbers
- View LC-PCC Policy Statements (LC-PCC PSs) and Metadata Guidance Documentation (MGDs)

Home Page

RDA Toolkit logo

Content tabs

Welcome message

Recently Viewed

Profile Toolbar

Search box

Main pane with info boxes

After logging in with profile login

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Using the RDA Toolkit

Module 6: Searching RDA Toolkit

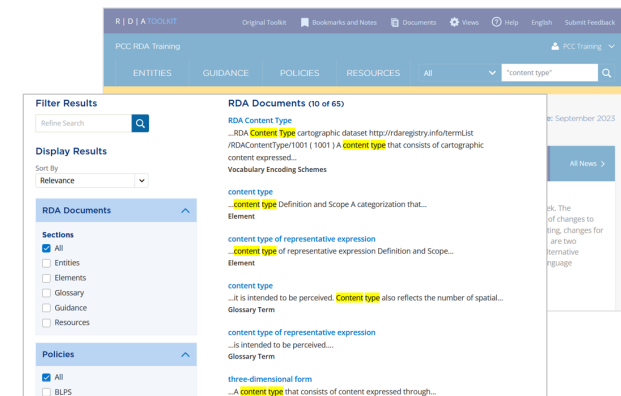
Learning Outcomes

- Search the RDA Toolkit using an exact phrase, words in any order, and wildcards
- Use different types of searches to narrow a search
- Search by MARC 21 fields and subfields, original instruction numbers, citation numbers, and former element labels
- Understand search results
- Refine and filter search results

Search Basics Exact Phrase

- To search for an exact phrase, enter the phrase in quotation marks.

"content type"



Using the RDA Toolkit

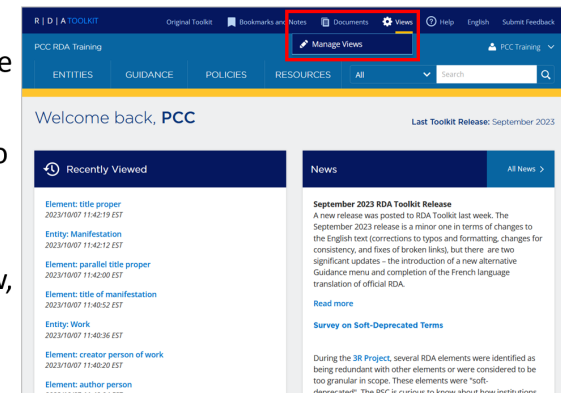
Module 7: Personalizing RDA Toolkit

Learning Outcomes

- Create views to change the display of policy statements, examples, Element Reference, and Orientation Guidance Menu
- Create bookmarks and notes to quickly navigate to critical or frequently used instructions
- View and subscribe to documents created by RDA Toolkit users

Manage Views

- Views are personalizations associated with your profile
- May have multiple views to support specific tasks
- To create or manage a view, select **Views > Manage Views**



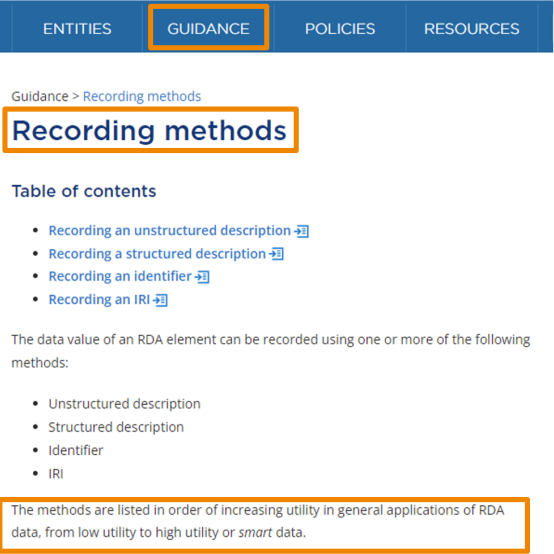
RDA Terminology and Concepts

Module 8: Recording Methods

Learning Outcomes

- Record data using the Recording Methods guidelines in the official RDA Toolkit
- Differentiate between the four recording methods:
 - Unstructured description
 - Structured description
 - Identifier
 - IRI
- Recognize the choices for each recording method, which could be in terms of transcription guidelines, vocabulary encoding schemes, or string encoding schemes

In the Toolkit, navigate to Recording methods from the Guidance menu



The screenshot shows the RDA Toolkit interface. At the top, there is a navigation menu with four tabs: ENTITIES, GUIDANCE, POLICIES, and RESOURCES. The GUIDANCE tab is selected and highlighted with an orange border. Below the menu, the breadcrumb path "Guidance > Recording methods" is visible. The main heading "Recording methods" is also highlighted with an orange border. Underneath, there is a "Table of contents" section with four links: "Recording an unstructured description", "Recording a structured description", "Recording an identifier", and "Recording an IRI". Below this, a paragraph states: "The data value of an RDA element can be recorded using one or more of the following methods:" followed by a list of the four methods. At the bottom, a note in an orange-bordered box states: "The methods are listed in order of increasing utility in general applications of RDA data, from low utility to high utility or *smart* data."

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RDA Terminology and Concepts

Module 9: Data Provenance

Learning Outcomes

- Navigate the Data Provenance guidance chapter in the RDA Toolkit
- Describe where to find the instructions for sources of information
- Define and understand data provenance and “metadata work”
- Identify RDA data provenance elements, including those that are unique to data provenance and those that are used to describe any resource
- Identify metadata in current MARC records that are data provenance data

“Recording a source of metadata that is a manifestation that is being described”

The “sources of information” instructions are here...

A manifestation may carry two or more sources of information for the value of an element.

Use the following options to select a *source of information* for the value of an element.

CONDITION

The source of a *metadata work* is a manifestation that is being described.

A manifestation consists of one or more pages, leaves, sheets, or cards.

CONDITION OPTION

Prefer the following recording sources, in this order:

1. A *title page, title sheet, or title card*
2. A *cover or jacket* issued with the manifestation
3. A *caption*
4. A *masthead*
5. A *colophon*

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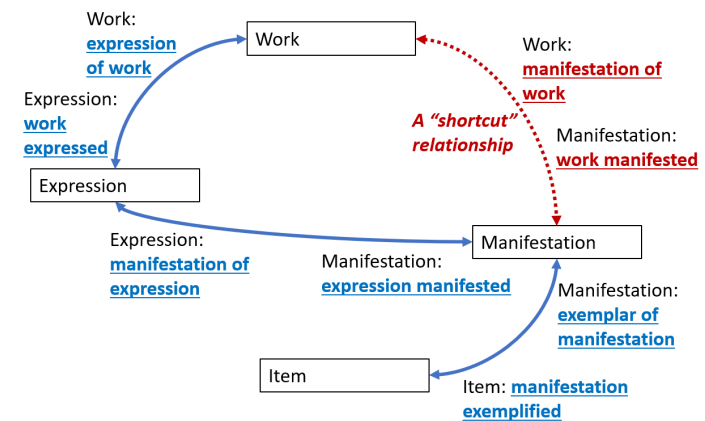
RDA Terminology and Concepts

Module 10: Coherent and Minimum Descriptions

Learning Outcomes

- Differentiate between an information resource and a resource entity
- Understand coherent description, minimum description, and effective description
- Identify elements required for a coherent description, minimum description, and effective description

Elements for a coherent description of an information resource



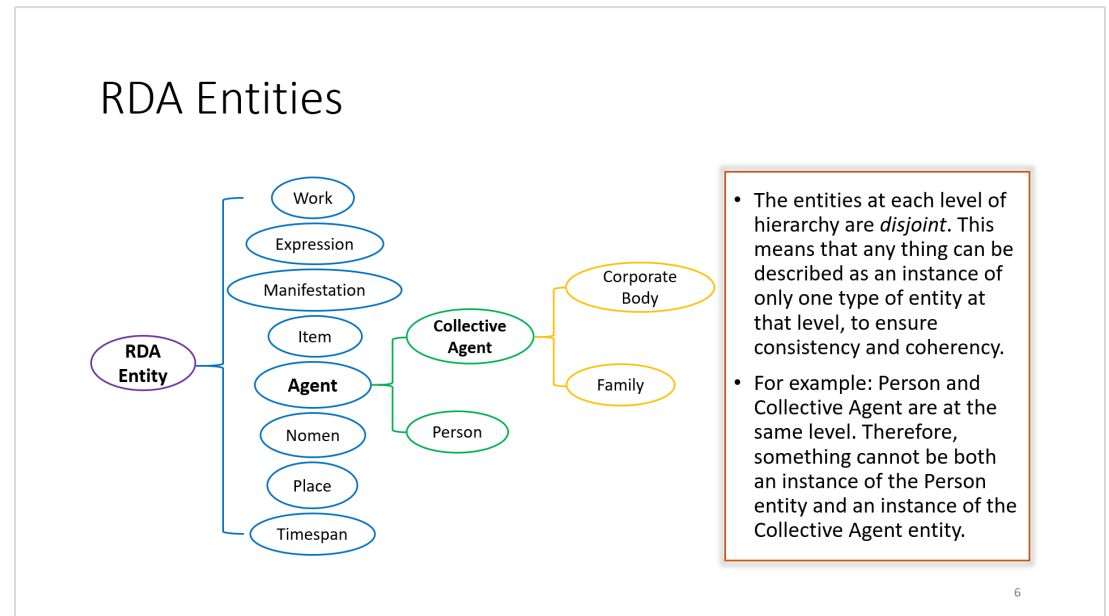
8

RDA Terminology and Concepts

Module 11: RDA Entities and Elements

Learning Outcomes

- Define metadata description set and metadata description statement
- Identify the 13 RDA entities and their hierarchy
- Give examples of elements required for a minimum description of each RDA entity
- Differentiate relationship elements and attribute elements

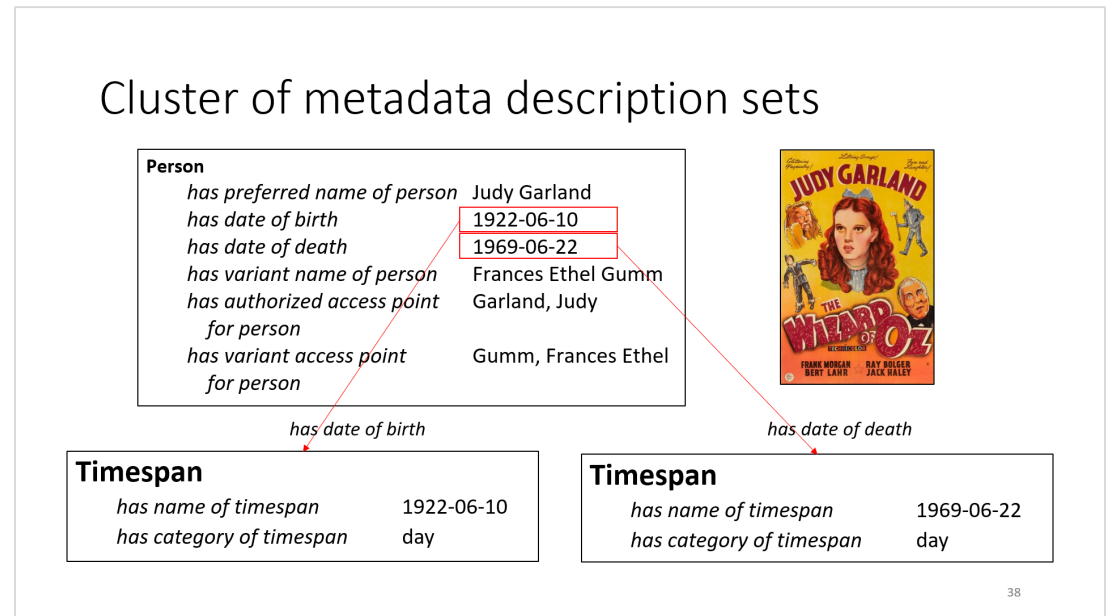


RDA Terminology and Concepts

Module 12: Timespan

Learning Outcomes

- Define the new Timespan entity
- Understand how timespan is used in current cataloging
- Identify RDA elements for describing a timespan
- Give examples of RDA relationship elements for relating an RDA entity to a timespan



RDA Terminology and Concepts

Module 13: Nomens and Appellations

Learning Outcomes

- Understand the development of the Nomen entity
- Differentiate nomen and nomen string
- Identify RDA elements for describing a nomen
- Identify relationship elements that relate an RDA entity to a nomen

Metadata Description Set Example



Work

<i>has preferred title of work</i>	The wizard of Oz
<i>has category of work</i>	Fantasy films ; Action and adventure films ; Musical films ; Fiction films
<i>has date of work</i>	1939
<i>has variant title of work</i>	El mago de Oz
<i>has variant title of work</i>	Ο μάγος του Οζ
<i>has variant title of work</i>	Ho magos tou Oz
<i>has authorized access point for work</i>	Wizard of Oz (Motion picture : 1939)
<i>has variant access point for work</i>	Mago de Oz (Motion picture : 1939)
<i>has variant access point for work</i>	Μάγος του Οζ (Motion picture : 1939)
<i>has variant access point for work</i>	Magos tou Oz (Motion picture : 1939)

Appellation elements

RDA Terminology and Concepts

Module 14: Manifestation Statements

Learning Outcomes

- Define manifestation statement
- Differentiate guidelines on basic transcription and normalized transcription
- Name RDA elements and MARC field/subfields for recording manifestation statements
- Understand why manifestation statements may be recorded

Manifestation statements Example

Basic transcription:

Manifestation title and responsibility statement

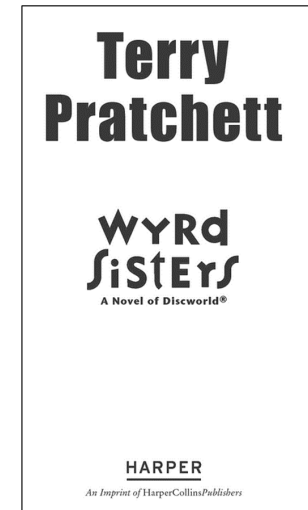
Terry Pratchett WYRd SiStErS A Novel of Discworld®

Manifestation publication statement

HARPER An Imprint of HarperCollinsPublishers

Full Manifestation statement for the title page

Terry Pratchett WYRd SiStErS A Novel of Discworld® \\
HARPER An Imprint of HarperCollinsPublishers



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RDA Terminology and Concepts

Module 15: Representative Expression

Learning Outcomes

- Understand the background for defining representative expressions
- Describe a representative expression
- Give examples of representative expression elements
- Explain how to record representative expression elements in MARC 21 bibliographic and authority records

MARC coding examples

Work

046 ## \$k -07
100 1# \$a Homer. \$t Odyssey
380 ## \$a Epic poetry \$2 lcgft
387 ## \$h grc
387 ## \$c text \$2 rdacontent

Expression

046 ## \$k 1504 \$2 edtf
100 0# \$a Homer. \$t Odyssey. \$l Greek \$s (Manuzio)
336 ## \$a text \$2 rdacontent
377 ## \$a grc
381 ## \$a Manuzio
500 1# \$w r \$i Editor: \$a Manuzio, Aldo, \$d 1449 or 1450-1515

Expression

046 ## \$k 1907 \$2 edtf
100 0# \$a Homer. \$t Odyssey. \$l Greek \$s (Allen)
336 ## \$a text \$2 rdacontent
377 ## \$a grc
381 ## \$a Allen
381 ## \$a Scriptorum classicorum bibliotheca Oxoniensis
500 1# \$w r \$i Editor: \$a Allen, Thomas W. \$q (Thomas William), \$d 1862-1950
530 #0 \$w r \$i Related work: \$a Scriptorum classicorum bibliotheca Oxoniensis

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RDA Terminology and Concepts

Module 16: Aggregates

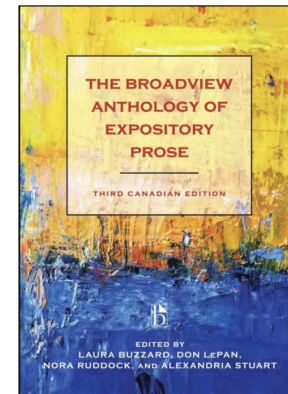
Learning Outcomes

- Recognize what an aggregate is
- Identify the three types of aggregates in RDA
- Describe the LRM general model of aggregates
- Apply the general model to each type of aggregate

User-driven examples of aggregates

A first-year undergraduate student who is taking an expository and persuasive writing course ...

- searches for a specific anthology containing essays or prose excerpts from a range of sources, disciplines, and time periods.
= Student searches for a **collection aggregate**



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RDA Terminology and Concepts

Module 17: Diachronic Works

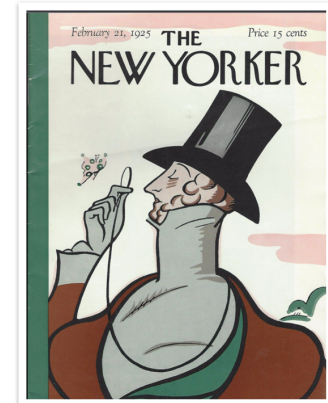
Learning Outcomes

- Distinguish diachronic works from static works
- Understand the importance of determining a work's extension plan
- Recognize the different types of diachronic works
- Recognize how the concept of WEM lock determines a new work

User-driven examples of diachronic works

A library user who visits their local library to browse issues of *The New Yorker*

- The library maintains a print subscription to *The New Yorker*
= the library subscribes to a **diachronic work**
- The user comes into the library regularly to catch up on the latest available issues of *The New Yorker*
= the user is interested in a **diachronic work**



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How to access the training

The screenshot shows the Library of Congress website. At the top, there is a navigation bar with links for 'ASK A LIBRARIAN', 'DIGITAL COLLECTIONS', and 'LIBRARY CATALOGS'. A search bar is also present. Below the navigation bar, the breadcrumb trail reads: 'The Library of Congress > Librarians, Archivists > PCC > Catalogers Learning Workshop > RDA'. The main content area is titled 'Phase 1: PCC Introductory RDA Training'. It includes a paragraph about the training materials, a paragraph about the first phase of training, a paragraph about the training modules, and a paragraph about feedback. A table lists the module titles and their corresponding slides and exercises. On the left side, there is a sidebar with a search bar and a list of links: 'CLW Home', 'About the CLW', 'Course Materials', 'Guidelines for Sponsors', 'eduCAT List', 'Related Links', and 'Contact Us'. Below the sidebar, there is a 'Related Resources' section with links to 'Program for Cooperative Cataloging (PCC)', 'Cataloging & Acquisitions', 'Librarians, Archivists', 'Online Catalog', and 'Webcasts'.

LIBRARY LIBRARY OF CONGRESS

ASK A LIBRARIAN DIGITAL COLLECTIONS LIBRARY CATALOGS Search GO Options

The Library of Congress > Librarians, Archivists > PCC > Catalogers Learning Workshop > RDA

CATALOGERS LEARNING WORKSHOP (CLW)

Phase 1: PCC Introductory RDA Training

The training materials were developed by past and current members of the Standing Committee on Training (SCT) RDA Training Task Group: Monographs.

This first phase of training consists of 17 modules for PCC catalogers, policymakers, and specialists to be able to identify key changes introduced during the 3R Project, use and navigate the RDA Toolkit, understand new concepts, and define key vocabulary terms. This Phase 1 training prepares learners for Phase 2 training which will focus on RDA in practice.

Designed for in-person or virtual instruction, the training modules can be used for self-study or training cataloging staff locally, regionally, or nationally. The training materials may also be adapted provided credit is given to the PCC SCT RDA Training Task Group: Monographs.

Please submit feedback, including corrections, suggested enhancements, and questions to the task group via the [PCC RDA Communications Committee Feedback Form](#).

Module Title	Slides (with speaker notes), Exercises
1. Overview of Phase 1: Introductory RDA Training	Slides - Module 1 (PPT : 293 KB)
Introduction to RDA	
2. Development and Basics of RDA	Slides - Module 2 (PPT : 774 KB)
3. Objectives and Principles Governing RDA	Slides - Module 3 (PPT : 1.30 MB)
Using the RDA Toolkit	
4. Getting Started with RDA Toolkit	Slides - Module 4 (PPT : 1.41 MB) Exercises - Module 4 (Word : 71 KB)

Search this site GO

- CLW Home
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- Course Materials
- Guidelines for Sponsors
- eduCAT List
- Related Links
- Contact Us

Related Resources

- Program for Cooperative Cataloging (PCC)
- Cataloging & Acquisitions
- Librarians, Archivists
- Online Catalog
- Webcasts

Freely available on Catalogers Learning Workshop

<https://www.loc.gov/catworkshop/rda/index.html>

How to use the training

- Self-study
- Training cataloging staff locally (e.g., within your institution), regionally (e.g., within your consortia), or nationally
- The training has been designed for virtual or in-person instruction
- Training materials may be adapted to meet the needs of your staff or audience, but credit must be given to the PCC SCT RDA Training Task Group: Monographs

Upcoming Webinars

- All introductory training modules will be presented as part of a series of 11 free webinars
- **Wednesdays at 2:00 PM EDT from March 13 to May 22**
- Register at: <https://www.loc.gov/catworkshop/rda/PCC-Introductory-RDA-Training-Webinars/index.html>
- Due to maximum attendee limits imposed by the presentation technology, please register and view the webinars in groups if possible
- All webinars will be recorded, and the recordings will be posted on the Catalogers Learning Workshop

Phase 1: PCC Introductory RDA Training & RDA Test Recommendations

- The PCC Introductory RDA Training addresses several training needs identified in the PCC test, including:
 - Using and understanding the RDA Toolkit
 - WEMI entities
 - RDA terminology
 - Navigating and searching RDA Toolkit
 - Recording elements
 - Structure of an element page
 - Basic concepts of RDA elements
 - Shortcut elements
 - Nomens and appellations
 - Nomen strings
 - Domain and range
 - Recording methods
 - Aggregates
 - Identifying the three types of aggregate manifestations
 - Data provenance
 - Locating data provenance guidance and sources of information
 - Other
 - Manifestation statements
 - Representative expressions
 - Metadata works
 - Minimum description
 - Diachronic works
 - Types of diachronic works
 - WEM lock

Phase 2: RDA in Practice

FORTHCOMING

Learning Outcomes

- Catalog print and electronic book monographs using the official RDA Toolkit, LC-PCC Application Profiles, LC-PCC Policy Statements, and Metadata Guidance Documentation
- Locate and interpret RDA instructions to answer cataloging questions

Phase 2: RDA in Practice & RDA Test Recommendations

- The Phase 2 training will address several training needs identified in the PCC test, including:
 - Using and understanding the RDA Toolkit
 - RDA in MARC
 - Interpreting LC-PCC PSs
 - Navigating among RDA Toolkit, LC-PCC PSs, and MGDs
 - Recording elements
 - How to record values for elements
 - Applying vocabulary encoding schemes
 - Entity boundaries
 - Basic concepts of RDA elements
 - Element hierarchy
 - Identifying PCC Core elements
 - Relationship elements
 - How to record relationship elements
 - Locating appropriate relationship labels
 - Aggregates
 - How to describe aggregate manifestations

PCC RDA Implementation Task Group

PCC RDA Implementation Task Group Charge

- To develop recommendations for PCC's implementation of the official RDA Toolkit
- To develop an implementation plan that provides a path towards PCC's implementation of official RDA by clearly outlining what implementation will look like for PCC membership

PCC's Rolling Implementation

- PCC will have a rolling implementation of the official RDA Toolkit from May 1, 2024 to April 30, 2027
- This 3-year rolling implementation will allow institutions to transition to the official RDA Toolkit before the removal of the original RDA Toolkit
- **PCC will continue to catalog using the original RDA Toolkit until instructed otherwise**

Current Work

- Developing a list of the tasks that must be completed, along with a timeline or deadline and the group or individual responsible for completing the work
- Developing an FAQ page to address questions that catalogers may have about implementation

Upcoming Task Group Discussion Questions

- What does a rolling implementation mean in the context of a mixed MARC/Linked Data environment?
- Does it matter if institutions start with bibliographic or authority records? If it does matter, which must come first?
- Should there be recommended target dates that PCC participants should be working towards (e.g., all authority records need to be created or updated using official RDA by x date)?
- Will catalogers be required to undergo specific training before contributing PCC records created using the official RDA Toolkit?
- What training will PCC provide and what training will be left to other cataloging communities (e.g., MLA, OLAC)?
- What methods of training will be provided by PCC?
- Will catalogers need to undergo review before contributing PCC records created using the official RDA Toolkit?
- What are best practices for catalogers to interact with the official RDA Toolkit, the LC-PCC PSs, the MAP, and the MGDs?
- When will the official RDA Toolkit and supporting documentation be ready for production with BIBFRAME data?

Conclusion from RDA Test

- As a result of this test, the task group has concluded that PCC can successfully implement the official RDA Toolkit; however, there remain a number of issues:
 - (1) metadata application profiles are required,
 - (2) LC-PCC PSs and MGDs must be updated,
 - (3) policy decisions must be made by PCC, and
 - (4) training materials must be readily and freely available

How to prepare for implementation

- Review available training
 - SCT IFLA LRM Training - What is IFLA/LRM?
<https://www.loc.gov/catworkshop/RDA2020/index.html>
 - Phase 1: PCC Introductory RDA Training
<https://www.loc.gov/catworkshop/rda/index.html>
 - Phase 1: PCC Introductory RDA Training Webinars
<https://www.loc.gov/catworkshop/rda/PCC-Introductory-RDA-Training-Webinars/index.html>

How to prepare for implementation

- Review available documentation
 - LC-PCC Policy Statements (LC-PCC PSs) in the official RDA Toolkit
 - Metadata Guidance Documentation (MGDs)
<https://www.loc.gov/aba/rda/mgd/>
- Provide Phase 1: PCC Introductory RDA Training to colleagues
- Provide feedback to PCC via PCC RDA Communications Committee Feedback Form: <https://bit.ly/PCC-RDA-Feedback-Form>

Questions