



**Program for
Cooperative Cataloging**

BIBCO / CONSER / NACO / SACO

Test of the Official RDA Toolkit

Presented by Adam Baron

On behalf of the Task Group to Test the Official RDA Toolkit

PCC Policy Committee Meeting, November 2, 2022

Task Group to Test the Official RDA Toolkit

- Adam Baron (UC Berkeley), Co-Chair
- Judith Cannan (LC), Co-Chair
- Dominique Bourassa (Yale)
- Annick Cloatre (BL)
- Laura Doublet (U of Victoria)
- Greta de Groat (Stanford)
- Oksana Osborne (GPO)
- Gordana Ruth (NLM)
- Trina Soderquist (LC)

Purpose

- To conduct a thorough test of the Official RDA Toolkit to ensure that PCC catalogers can use the toolkit, related LC/PCC Policy Statements, and Metadata Guidance Documents 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

The Test

October 17-November 4

Test Overview


- Create 6-8 bibliographic records and at least 1 authority record (if NACO trained) using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation
- Document the steps taken to describe items, as well as the difficulties encountered, in order to identify where policies and guidance may need revision

Documentation for Testers

- Guidelines for Testers
- Blank Tester Template
- Sample Tester Template
- Posttest Survey for Testers

Guidelines for Testers

- Provides detailed instructions for completing the test and filling out the template
- Basic Procedure
 - Catalog items
 - Document instructions, policies, and guidance applied
 - Note any questions or problems
 - Upload final records and surrogates
 - Submit posttest survey



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Test of the Official RDA Toolkit

Guidelines for Testers

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Metadata Guidance Document Applied	10
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Notes/Problems Encountered	11

Blank Tester Template

Blank Tester Template ☆ 📄 ☁️
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	A	B	C	D	E	F	G	H	
1	RDA Element	MARC Field & Subfield or BIBFRAME Property	Value	RDA Instruction Applied	URI	LC-PCC Policy Statement Applied	Metadata Guidance Document Applied	Metadata Guidance Document URL	Notes/Problem
2									
3									
4									
5									
6									
7									
8									
9									
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Sample Tester Template

Sample Tester Template ☆ 📄 ☁


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	A	B	C	D	E	F	G	H
	RDA Element	MARC Field & Subfield or BIBFRAME Property	Value	RDA Instruction Applied	URI	LC-PCC Policy Statement Applied	Metadata Guidance Document Applied	Metadata Gui Document UR
1								
2	title proper	245 \$a	Music matters	Prerecording	https://access.rd	LC/PCC Core.		
3				Record a value of Manifestation: title of manifestation.	https://access.rd	LC/PCC practice: Apply the option.		
4				Use any source of information. Record the form found in the source of information.	https://access.rd			
5				Prefer the following recording sources, in this order: A title page, title sheet, or title card	https://access.rd	LC/PCC practice: Apply the option.		
6				Record a title by transcribing text and spoken word content from a manifestation using Guidance: Transcription guidelines. Guidelines on normalized transcription.	https://access.rd	LC/PCC practice: Apply the option.		
7				Record a value in the language and script in which it appears on a manifestation.	https://access.rd	LC/PCC practice: Apply the option. Transcription requires as much fidelity to the source as the technical capacity within the cataloging agency will allow. Instructions on how to handle unusual symbols and characters are given in detail in the Metadata Guidance documents, with specific directions for each in terms of the particular character set phenomenon encountered.		
8				Capitalize the first word of an unstructured description.	https://access.rd	LC/PCC practice: Apply the option.		
9				Capitalize the first word or the abbreviation of the first word in a title, or in a title of an issue, part, or	https://access.rd			

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Posttest Survey for Testers



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Posttest Survey for Testers

Thank you very much for participating in the PCC test of the Official RDA Toolkit as a tester.

OBJECTIVE
This survey aims to highlight areas which need attention in preparing for implementation and training of the Official RDA.

TIMELINE
This survey should be completed only after cataloging all of your items, filling out your template, and uploading your final records and surrogates to your assigned Google Drive folder.

Deadline: Friday, November 4, 2022


QUESTIONS
If you have any questions, please contact the PCC Task Group to Test the Official RDA Toolkit at pccrdatest@lists.berkeley.edu.

Sample Questions

- In cataloging your items, did you have any difficulty interpreting Official RDA?
- In cataloging your items, did you notice any areas that will require extra attention during training?
- As a result of your test, do you feel that the Official RDA Toolkit is ready to be used now?
- Do you have any suggestions to help with the implementation process?
- Before implementation, are there any policies or metadata guidance that should be revisited by PCC?
- After implementation, are there any policies or metadata guidance that should be revisited by PCC?

Recruiting Testers

- Two calls for participation:
 - December 2021: Initial call to PCC List by PoCo Chair
 - September 2022: Second call to PCC List by task group
- Tester Participation Survey
 - Detailed information about the test, including all documentation
 - Interest in participating
 - Formats and level of expertise
 - Languages and scripts
 - BIBFRAME



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Tester Participation Survey

Thank you for your interest in being a tester for the PCC test of the Official RDA Toolkit.

OVERVIEW OF THE TEST
For the test, the goal is to create 6-8 bibliographic records and at least 1 authority record (if NACO trained) using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation. You will document the steps you take to describe items, as well as the difficulties you encounter, in order to identify where policies and guidance may need revision.

FORMATS
You will be assigned one or more formats to catalog based on your expertise.

EXPERIENCE AND TRAINING
Testers require a good working knowledge of original RDA, but should have little experience with Official RDA.

If selected for the test, you will receive the following training via Zoom:

- Monday, October 3 at 2:00-3:00 PM EDT / 11:00 AM-12:00 PM PDT: Training on navigating and using the Official RDA Toolkit
- Tuesday, October 11 at 2:00-3:00 PM EDT / 11:00 AM-12:00 PM PDT: This session will cover how the test will be conducted and answer any questions you have

Selecting Testers

- Matched testers with evaluators based on format and language/script expertise
- 50 testers were selected to participate from:
 - 36 different institutions, including academic, public, national, and government libraries
 - United States, Canada, Europe

Formats, Languages and Scripts Selected

Text

- Book (Electronic)
- Book (Print)
- Graphic novel
- Legal material
- Rare material

Audio/Music

- Music audio disc
- Score
- Spoken word audio disc
- Streaming audio

Cartographic

- Atlas
- Map

Video

- Streaming video
- Video game
- Videodisc

Continuing Resource

- Integrating resource
- Serial

Other

- Kit
- Photograph
- Realia

Languages and Scripts

- Chinese
- Cyrillic
- English
- Hebrew
- Japanese

Training for Testers

Official RDA Toolkit Training

- Monday, October 3
- Topics covered:
 - Logging into the toolkit and creating a profile
 - Navigating RDA Toolkit
 - Searching RDA Toolkit
 - Personalizing RDA Toolkit, including managing views

Training for Testers

- Tuesday, October 11
- Topics covered:
 - Purpose and overview of the test
 - Introduction to Tester Template and folder
 - Demonstration on how to fill out the template
 - Q & A

Assignment Emails and Testing Period

- All testers received an assignment email with:
 - Their assigned format(s)
 - Their assigned editor(s) (i.e., MARC-based system or Sinopia)
 - Link to their assigned Tester Template
 - Link to their assigned Google Drive folder
 - Link to the Posttest Survey for Testers
 - Links to documentation and training
- **Testing period: October 17-November 4, 2022**

The Evaluation

November 14-January 6

Evaluation Overview

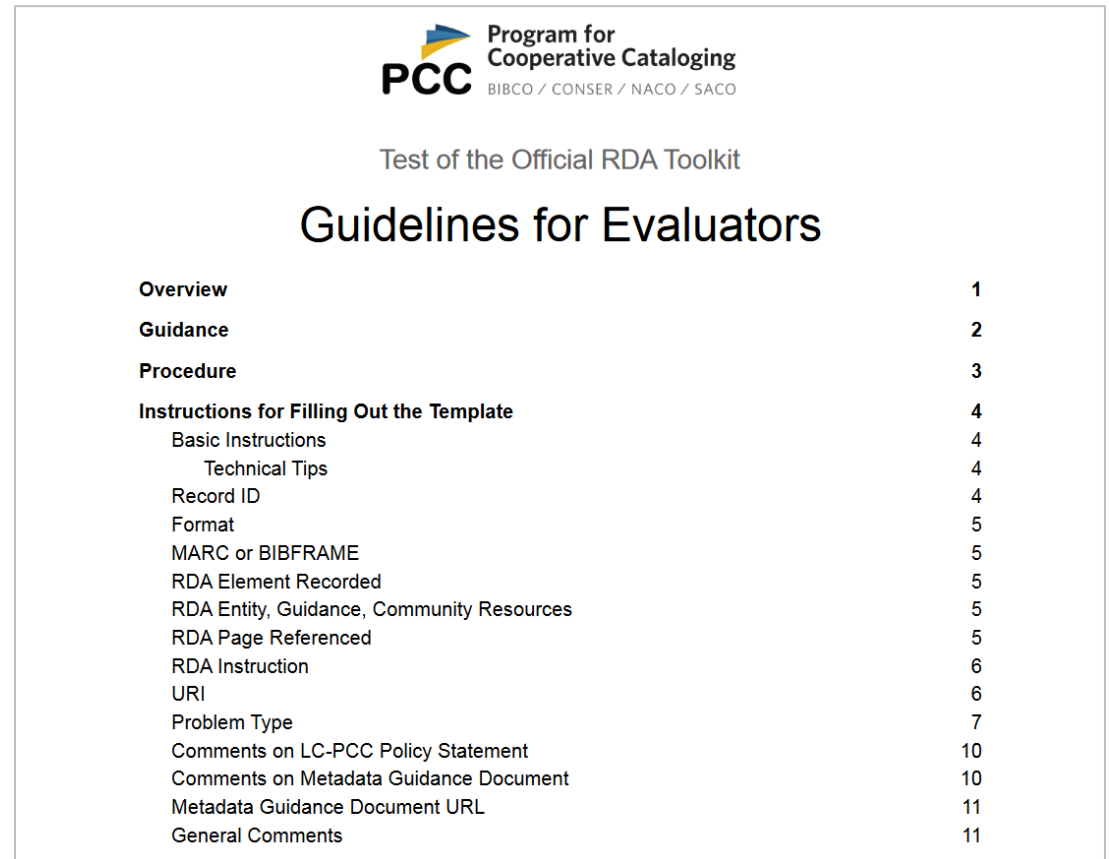
- Review no more than 27 bibliographic and authority records that testers created using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation
- Analyze tester templates and compile comments and observations in order to identify where policies and guidance may need revision

Documentation for Evaluators

- Guidelines for Evaluators
- Blank Evaluator Template
- Sample Tester Template with Mistakes
- Sample Evaluator Template
- Posttest Survey for Evaluators

Guidelines for Evaluators

- Provides detailed instructions for completing the evaluation and filling out the template
- Basic Procedure
 - Review assigned Tester Templates
 - Document all issues encountered, either by tester or evaluator
 - Submit posttest survey



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Guidelines for Evaluators

Overview	1
Guidance	2
Procedure	3
Instructions for Filling Out the Template	4
Basic Instructions	4
Technical Tips	4
Record ID	4
Format	5
MARC or BIBFRAME	5
RDA Element Recorded	5
RDA Entity, Guidance, Community Resources	5
RDA Page Referenced	5
RDA Instruction	6
URI	6
Problem Type	7
Comments on LC-PCC Policy Statement	10
Comments on Metadata Guidance Document	10
Metadata Guidance Document URL	11
General Comments	11

Blank Evaluator Template

The image shows a Google Sheets spreadsheet titled "Blank Evaluator Template". The interface includes a menu bar (File, Edit, View, Insert, Format, Data, Tools, Extensions, Help), a toolbar with various icons, and a status bar at the bottom. The spreadsheet has a grid with columns A through J and rows 1 through 25. The first row (row 1) contains the following headers: "Record ID" (column A), "Format" (column B), "MARC or BIBFRAME" (column C), "RDA Element Recorded" (column D), "RDA Entity, Guidance, Community Resources" (column E), "RDA Page Referenced" (column F), "RDA Instruction" (column G), "URI" (column H), "Problem Type" (column I), "Comments on LC-PCC Policy Statement" (column J), and "Cor Gui" (column K). The second row (row 2) contains dropdown menus for "Format" and "MARC or BIBFRAME", and a dropdown for "RDA Element Recorded". The remaining rows (rows 3-25) are empty, with dropdown menus visible in columns B, C, and D. The status bar at the bottom shows "Sheet1" and an "Explore" button.

	A	B	C	D	E	F	G	H	I	J	K
1	Record ID	Format	MARC or BIBFRAME	RDA Element Recorded	RDA Entity, Guidance, Community Resources	RDA Page Referenced	RDA Instruction	URI	Problem Type	Comments on LC-PCC Policy Statement	Cor Gui
2			MARC								
3			MARC								
4			MARC								
5			MARC								
6			MARC								
7			MARC								
8			MARC								
9			MARC								
10			MARC								
11			MARC								
12			MARC								
13			MARC								
14			MARC								
15			MARC								
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19			MARC								
20			MARC								
21			MARC								
22			MARC								
23			MARC								
24			MARC								
25			MARC								

Sample Evaluator Template

Sample Evaluator Template ☆ 📄 ☁


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	A	B	C	D	E	F	G	H	I	J
1	Record ID	Format	MARC or BIBFRAME	RDA Element Recorded	RDA Entity, Guidance, Community Resources	RDA Page Referenced	RDA Instruction	URI	Problem Type	Comments on LC-PCC Policy Statement
2	00-B1-Book (Print)-04	Book (Print)	MARC	title proper	Manifestation	title of manifestation	Use any source of information. Record the form found in the source of information.	https://access.rc	Problem in LC-PCC PS	The LC-PCC PS only refers to manuscripts and does not provide instructions on if it should or should not be applied to other resources. LC/PCC practice: For manuscripts, title of manifestation should come from the name of a physical manuscript ...
3	00-B1-Book (Print)-04-05	Book (Print)	MARC	title proper	Manifestation	title of manifestation	Use any source of information. Record the form found in the source of information.	https://access.rc	Problem in LC-PCC PS	Include a link to Guidance > Data provenance > Recording a source of metadata (https://access.rdatoolkit.org/en-US_aia-cfa18e03-17f2-378a-874c-86515bf7e0ac/section_gr4_l4l_5cb) for the preferred order of sources of information.
4	00-B1-Book (Print)-16	Book (Print)	MARC	other title information	Guidance	Guidelines on normalized transcription	Capitalize the first word of an unstructured description.	https://access.rc	Incorrect instruction applied	

Sheet1 Explore

Posttest Survey for Evaluators



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Posttest Survey for Evaluators

Thank you very much for participating in the PCC test of the Official RDA Toolkit as an evaluator.

OBJECTIVE
This survey aims to highlight areas which need attention in preparing for implementation and training of the Official RDA.

TIMELINE
This survey should be completed only after evaluating all assigned records and filling out your template.

Deadline: Friday, January 6, 2023


QUESTIONS
If you have any questions, please contact the PCC Task Group to Test the Official RDA Toolkit at pccrdatest@lists.berkeley.edu.

Sample Questions

- In examining the records, did you notice any areas where it seemed the tester(s) had difficulty interpreting Official RDA?
- In examining the records, did you notice any areas that will require extra attention during training?
- As a result of your evaluation, do you feel that the Official RDA Toolkit is ready to be used now?
- Do you have any suggestions to help with the implementation process?
- Before implementation, are there any policies or metadata guidance that should be revisited by PCC?
- After implementation, are there any policies or metadata guidance that should be revisited by PCC?

Recruiting Evaluators

- Recruitment
 - Initially, focused on those who wrote policy statements or Metadata Guidance Documents
 - Expanded to those with a good working knowledge of Official RDA
- Evaluator Participation Survey
 - Detailed information about the test, including all documentation
 - Interest in participating
 - Formats and level of expertise
 - Languages and scripts
 - BIBFRAME



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Evaluator Participation Survey

Thank you again for expressing your interest to be an evaluator for the PCC test of the Official RDA Toolkit.

OVERVIEW OF THE TEST
For the evaluation, you will review no more than 27 bibliographic and authority records that testers created using the Official RDA Toolkit, the LC-PCC Policy Statements, and the Metadata Guidance Documentation. You will analyze tester templates and compile comments and observations in order to identify where policies and guidance may need revision.

FORMATS
You will be assigned records to evaluate based on the expertise you identified.

EXPERIENCE AND ORIENTATION
Evaluators require a good working knowledge of the Official RDA Toolkit.

There will be an orientation session on how to proceed on Monday, October 31 at 2:00-3:00 PM EDT / 11:00 AM-12:00 PM PDT. It will be recorded and shared with all evaluators.

Orientation for Evaluators

- Monday, November 7
- Topics to be covered:
 - Purpose and overview of the test
 - Introduction to Evaluator Template and files
 - Demonstration on how to fill in the template
 - Q & A

Assignment Emails and Evaluation Period

- All evaluators will receive an assignment email with:
 - Links to each of their assigned tester's Google Drive folder
 - Link to their assigned Evaluator Template
 - Link to their assigned Google Drive folder
 - Link to the Posttest Survey for Evaluators
 - Links to documentation and training
- **Evaluation period: November 14, 2022-January 6, 2023**

The Analysis

January-March 2023

Questions

pccrdatest@lists.berkeley.edu