

Review: RDA Update Forum, Sunday, January 17, 2010

ALA Midwinter, Boston

Written for MLA's Bibliographic Control Committee

Featured panelists: Sally McCallum (Library of Congress), Don Chatham (ALA), Troy Linker (ALA, director of RDA's publication), Beacher Wiggins (LC, co-chair testing group), Glenn Patton (OCLC)

The session began with Sally McCallum summarizing the major changes to the MARC code to accommodate RDA. The first major area she covered was with Content, Media and Carrier types. Content type would be represented by variable field 336, Media by 337, and Carrier type by 338.

Ms. McCallum then covered the area of Attributes of Names and Resources (authority fields). New fields for these attributes have been established for names and there is a January 2010 MARBI proposal for attributes of resources (works and expressions). Notable examples for name include 370 for Associated Place, 371 for Address, 375 for Gender; examples for resources include 380 for Form of Work, 382 for Medium of Performance, and 384 for (musical) Key.

The last major area she covered dealt with the three types of relationships, which are 1) Name to resource, 2) Resource to resource, 3) Name to name, all covered in appendix I, J, and K, respectively.

She ended by noting other miscellaneous RDA-related MARC changes, such as the proposed changes to 033 and 518 fields under discussion at the Midwinter MARBI meeting. She then excused herself to go to the MARBI meeting currently in progress.

The next two panelists were Don Chatham and Troy Linker, who are directing ALA's publication of RDA. Mr. Chatham basically gave a brief summary of their project, and then introduced Mr. Linker, who would review the RDA Toolkit.

Mr. Linker began by saying that the RDA Toolkit (which contains RDA) would be released in June. Basically, the RDA Toolkit will be a

collection of cataloging tools in addition to RDA, such as AACR2 and other associated resources. A beta site is available to review for various constituencies.

The RDA Toolkit will allow an unlimited number of users, but only a specific amount at one time; one simultaneous user being the standard package. The Toolkit has numerous features that are similar to that of Cataloger's Desktop. For example, it has a fully expandable table of contents, bookmarking (including adding notes and the ability to hide them), and advanced searching capabilities (which includes keyword or string searching, pre-set limits, and limiting by specific section of RDA).

In addition to Desktop-like features, you can also set what are called deep-links to specific rules in RDA, so you can get there from any web page. A feature known as the RDA Element Set View allows you to view related vocabulary and have links to related rules (such as corresponding rules in AACR2).

Another major feature of The RDA Toolkit, in addition to RDA itself, is the Workflow section. Here you can have access to all sorts of different workflows member libraries have contributed concerning their RDA cataloging procedures. You can also upload your specific workflow for others to use. You can browse and search other institutions' workflows, bookmark and even copy and paste sections from them for your needs.

Another useful larger section is one entitled Mappings, which covers nothing but various crosswalks between different rules, coding schemas, etc.; a more notable one being that between RDA and MARC21.

The final major section in RDA Toolkit is Resources. This is where AACR2 is found. Features include links from AACR2 to corresponding RDA rules, and the ability to search for an AACR2 rule, and then be taken to the corresponding RDA rule.

Forthcoming additions include LC policy statements (in the vein of current LCRIs) and many others.

Mr. Linker then transitioned to talk about various issues surrounding

the resource. He mentioned that they are looking for it to be accessible through Cataloger's Desktop, and that there will be discount pricings for library schools. Speaking of pricing, the basic package (unlimited use, but only one user at a time) is \$325, 2-9 (simultaneous) users prices at \$55 per additional user, 10-19 at \$50 per additional user, 20+ at \$45. For the first three months of release (June 1-August 31), The RDA Toolkit will be complimentary.

He encouraged people to write [rdatoolkit@ala.org](mailto:rdatoolkit@ala.org) to find out about free trials, special introductory offers, and product updates. Mr. Linker's presentation will be repeated as a webinar in early February. He then opened up the floor for questions.

1<sup>st</sup> question: Would they consider using the complimentary access period to gauge usage patterns, i.e. how many people use it simultaneously, which could aid institutions' decisions about how which concurrent user package they should purchase. Answer: they will see if they can gauge this at their end.

2<sup>nd</sup> question: Will there be sharable bookmarks. Answer: they are currently under development, at least that which can be shared within the same institution.

3<sup>rd</sup> question: When will the RDA testers have access to The RDA Toolkit? Answer: In March.

4<sup>th</sup> question: Will there be a way to track changes to the rules as they happen? Answer: There currently is not a way to do this. We will look into this.

5<sup>th</sup> question: Translation of RDA Toolkit into other languages. Answer: Currently working out cost structures and interface for that.

6<sup>th</sup> question: Will there be limitations on copying and pasting from the resource? Answer: The limits will be copyright-based. There likely will be a Word-style editor in RDA Toolkit later.

After the final question, Beecher Wiggins began with his portion of the meeting. His presentation was a review of the RDA testing period to be led by the three national libraries (Library of Congress, National Library of Medicine, and National Library of Agriculture).

Following is a brief review of the timeline. They have convened 24 test partners who will work with the three national libraries. The testing will take a total of nine months. Specifically, there will be three months to learn how to use RDA (July-September), three months to use it and test on materials (October-December), and three months to assess results (January-March 2011).

More details: on January 15 (at Midwinter) they held a train the trainer session. During the testing phase, they will test RDA in every possible way. For the testers, there will be options on how or what to test. The Library of Congress will serve as the host site for all documents used during this period.

Specific plans: each tester will catalog the base set of 25 titles using RDA, which will be divided up between 15 integrating resources, 10 serials, and 5 Audio/Visual items; they will also catalog at least 10 items out of their regular workflow using RDA. Test data will be available for anyone to see. Testers will use BaseCamp software to collaborate. Other tools will be shared on open URL. Mr. Wiggins closed by mentioning that they plan on sharing documentation and other materials related to testing efforts.

The final speaker was Glenn Patton of OCLC, who reviewed OCLC's involvement in the RDA testing process. Some overall details: OCLC plans on working with LC, NAL and NLM in support of testing participants. They will look to see how RDA works in OCLC's various public interfaces, such as WorldCat.org. OCLC's Contract Cataloging team also plans to participate in RDA testing.

He expects MARC21 changes specific to RDA to be installed in May. Some notable examples include "040 \$e rda" to identify the fact that RDA rules have been used in a given bib record. Also, new fields that will be present in these records are the 336 (Content type), 337 (Media type), and

338 (Carrier type). Authority records will also have “040 \$e rda” to distinguish those created using RDA rules. Forthcoming fields for use in RDA-based authority records will cover entity attributes. Other MARC changes are included in MARC Update no.10.

Development of instructions for participants is currently underway. The draft has been reviewed at this conference, and has instructions for Connexion users and batchloading.

Records from testing institutions will go straight in WorldCat. Some of these records’ functionality that will mirror what is currently available includes IRs, constant data records to provide workforms, existing exporting and batchloading functionality.

Training plans for using RDA in OCLC include webinars for testing participants, and later on general sessions for member libraries. Future Technical Bulletins will discuss the changes in detail.

At the conclusion of Mr. Patton’s presentation, the floor was opened up for a general Q&A session for all speakers. Before those began, one of the speakers mentioned that there would be live demos of The RDA Toolkit on the exhibit floor. Also, Mr. Patton implored us to consult the most up-to-date online version, not the pdf version that was sent out for review at the end of 2008. [Note: online version is not currently available for viewing.]

1<sup>st</sup> question: Will there be special pricing for consortia? Answer: Still being worked out.

2<sup>nd</sup> question: Will there be de-duping of RDA and AACR2 records that represent the same exact item? Mr. Wiggins replied that they are still working out this matter.

3<sup>rd</sup> question: Will you be able to create AACR2 based records to compliment RDA records? Answer: That is not our intention; no parallel records for different cataloging rules. This was followed up with a clarification that if you’re system can’t handle RDA records, make it AACR2 in your local system, but please only do RDA in OCLC.

4<sup>th</sup> question: Can testers do more than 25 records if they wish?  
Answer: after 2<sup>nd</sup> three months (see earlier timetable), testers will be able to catalog their own materials using RDA rules – 25 total – which will also be submitted as a part of the test.

5<sup>th</sup> question: How will the *desc* fixed field would be coded, which is currently *a* for AACR2. The answer was *i* for ISBD, with the accompanying 040 \$e rda. (Observation: Many folks didn't seem to like this.)

6<sup>th</sup> question: Follow up to last question, what should be done about the *e* for DCRM rules. Answer: Haven't addressed that yet, but will. [Note: MARBI has made 040 \$e repeatable, so this should solve that problem.]

7<sup>th</sup> question: Are vendors a part of this discussion? Answer from Mr. Wiggins: Have contacted them (evidently with no response yet?). From Mr. Linker: We have an open invitation to them for this participation. [Note: The national libraries held an open meeting with vendors earlier this day.]

8<sup>th</sup>: Are current AACR2 records in OCLC going to be upgraded to RDA? Answer: We are interested in doing this.

The session closed with a comment from someone in the audience, which was that she hoped people resist the urge to upgrade current AACR2 records to RDA in OCLC.