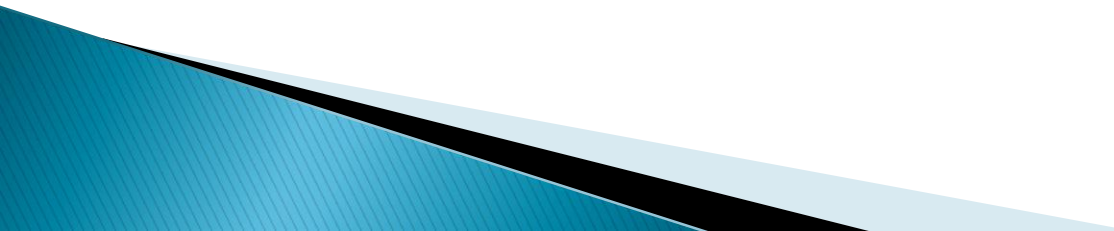


Implementing RDA: Managing the Transition

Lori Robare
Oregon Library Association
April 26, 2012

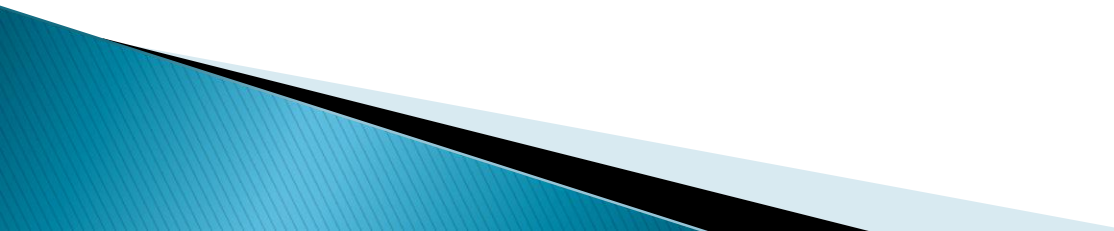
Overview

- ▶ LC's implementation plans
 - And LC's decisions about copy cataloging for books
 - ▶ Current policies for records in WorldCat
 - ▶ PCC recommendations for hybrid bib records
 - ▶ PCC plans for authority file
 - ▶ OCLC discussion paper:
 - Incorporating RDA practices into WorldCat
- 

LC's implementation

- ▶ March 31, 2013
 - The date when all catalog records newly created at LC will be produced according to RDA
- ▶ Training plans
 - About 30 catalogers (RDA testers) resumed cataloging with RDA in November
 - Another 30 will be trained in June
 - Supervisors and chiefs trained in July
 - August on: about 60 people trained each month

When will you implement?

- ▶ LC's decision is for LC only
 - ▶ PCC decisions/timing discussed in this program
 - ▶ Every library will need to decide about the right timing for transitioning to RDA
- 

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Resource Description and Access (RDA)

Information and Resources in Preparation for RDA

www.loc.gov/aba/rda**News**

- [4/9/12: Summary of LCPS Changes for the April 2012 release of the RDA Toolkit Posted](#) [PDF, 32 KB]
 - [3/23/12: List of Webcasts for RDA Training Added](#)
 - [3/21/12: Sessions on NARs added to RDA Refresher Training at LC: Special Topics page](#)
- [More news](#) »

*Documentos disponibles en español***Documentation**

- [Core Elements for LC \(December 23, 2011\)](#) [PDF, 114 KB]
- [Library of Congress Policy Statements \(LCPS\)](#)
- [Additional Information](#)

Community

- [Program for Cooperative Cataloging \(PCC\)](#)
- [OCLC Policy Statement on RDA Cataloging](#)
- [SkyRiver Statement on RDA](#)

Timeline and FAQ

- [Timeline](#)
- [FAQ \(To be added\)](#)

Training

- [Webcasts](#)
- [Training Modules](#)
- [Exercises](#)
- [Examples](#)
- [LC RDA Training Plan March 12, 2012](#) [PDF, 69 KB]
- [Catalogers Learning Workshop \(CLW\)](#)



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- [Subject & Genre/Form](#)

Training Modules for RDA

Resource Description and Access at the Library of Congress

3/21/12

Posted here are links to training modules relating to RDA. These modules, along with additional materials, were prepared for training sessions conducted by Library of Congress staff.

[RDA Refresher Training at LC: Special Topics](#)

Follow-up sessions on specific topics were presented at the Library of Congress for those LC catalogers who had returned to cataloging with RDA in November 2011. Additional sessions will be added when available.

[RDA Refresher Training at LC \(October 2011\)](#)

The Library of Congress had refresher sessions for those LC participants in the 2010 U.S. RDA Test who will be returning to cataloging with RDA in November 2011. These training materials are an overview of RDA with reminders for LC cataloging staff who already had RDA training in 2010; also covered are LC's changes in core elements and in policy decisions informed by the US RDA Test. (For more complete training materials, see the files for the Georgia Public Library Cataloging Summit.)

[Georgia Public Library Cataloging Summit \(August 2011\)](#)

The Georgia Public Library Service hosted the inaugural GPLS Cataloging Summit at Unicoi State Park in Helen on August 9-11, 2011. This conference was designed for catalogers, particularly those who have primary responsibility for cataloging and cataloging training.

The Library of Congress > [Cataloging, Acquisitions](#) > [General, Descriptive Cataloging](#) > [RDA](#) > RDA Refresher Training at LC: Special Topics

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RDA Refresher Training at LC: Special Topics

3/21/12

RDA Refresher Training at LC: Special Topics

Follow-up sessions on the topics listed below were presented at the Library of Congress for those LC catalogers who had returned to cataloging with RDA in November 2011. Additional sessions will be added when available.

Topics:

→ [Art catalogs flowchart](#) [DOC, 32 KB]

→ [Art catalogs](#) [PPT, 756 KB]

→ [Compilations](#) [PPT, 1.85 MB]

→ [Conferences](#) [PPT, 627 KB]

→ [RDA Elements in NARs](#) [PPT, 2.5 MB]

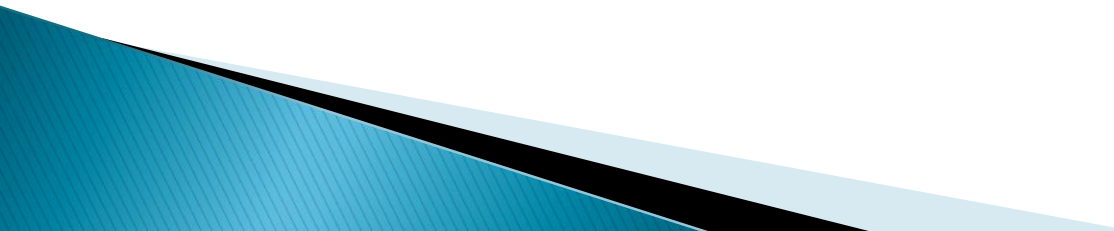
→ [Relationship Designators in RDA NARs](#) [PPT, 999 KB]

→ [Revised editions](#) [PPT, 507 KB]

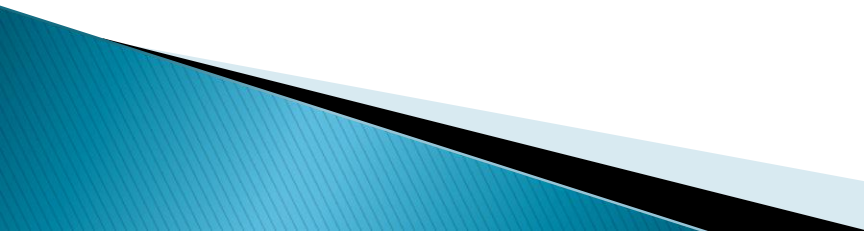
LC's copy cataloging decisions

- ▶ Presentation by Barbara Tillett at ALA Midwinter:

www.loc.gov/catdir/cpso/news_presentation_ala_120121.html

- ▶ Describes when it is appropriate for LC catalogers to convert AACR2 records to RDA
 - ▶ Differences to check/what to change
- 

Current OCLC policy

- ▶ Do not change full-level master records from one set of rules to another
 - Exception for continuing resources: may change from AACR2 to RDA as part of updating a record
 - ▶ For minimal-level (or less) records: OK to change from AACR2 to RDA as part of upgrading record to full-level
 - Do not change back to AACR2 once upgraded to RDA
- 


Current OCLC policy (2)

- ▶ Catalogers may LOCALLY edit records to another set of rules
- ▶ If a record created according to AACR2 or RDA exists in WorldCat, do NOT create a duplicate according to the other code

PCC and RDA


- ▶ The Program for Cooperative Cataloging (PCC) is doing a tremendous amount of work to prepare for RDA
 - www.loc.gov/catdir/pcc/RDA-PCC.html
- ▶ For bibliographic records, there is no “PCC Day One”
 - Each PCC library will transition on its own timetable
 - Expectation that the transition will be as expeditious as possible

PCC Task Group on Hybrid Bibliographic Records

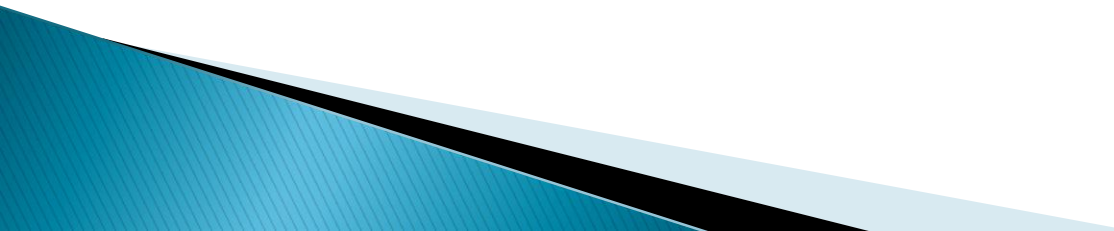
- ▶ In performing maintenance on an existing record (serial, multi-part), should a record be changed to a different code?
 - ▶ How much is it desirable/permissible to change existing records for other reasons, e.g. to add fields 336–338?
 - ▶ What changes should trigger a change in coding the record (e.g. from AACR2 to RDA)?
- 

TG final report

www.loc.gov/catdir/pcc/RDA-Hybrid-bib-TG.html

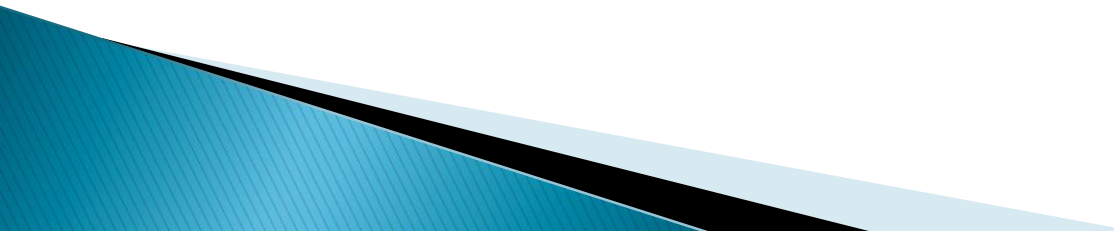
- ▶ Guidelines for working with RDA and AACR2 records during the transition period
 - ▶ Scope: edits to PCC-level records (BIBCO and CONSER)
 - ▶ Includes useful guidance on field-by-field differences when working with copy
- 

General guidelines

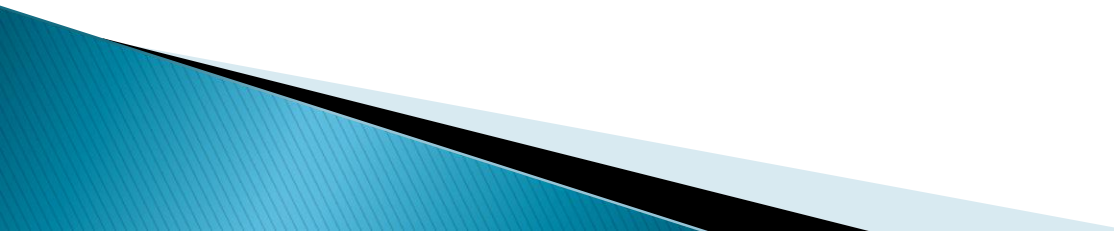
- ▶ Do not remove valid AACR2 elements or valid RDA elements when enhancing records
 - ▶ Be nice! Avoid “editing wars” that are merely stylistic
 - ▶ Do no harm! Retain elements that are correct, even if you would not normally supply them
- 

Guidelines for...

- ▶ Monographs
 - ▶ Serials
 - ▶ Integrating resources

 - ▶ For each:
 - Editing RDA records: for catalogers not yet familiar with RDA
 - Editing non-RDA records: for catalogers not trained in AACR2
- 

Recommendations

- ▶ Generally don't re-catalog AACR2 records to RDA
 - But minimal-level records, OK to "re-describe"
 - ▶ In some cases it may be necessary to re-describe (serial records, integrating resources)
 - ▶ Catalogers should be allowed to add:
 - Fields 336, 337, and 338 to AACR2 records without removing existing GMDs
 - Relationship designators to fields in AACR2 records
- 

Tables

- ▶ Acceptable enhancements:
 - Can be safely made because practices are similar in the two content standards
- ▶ Things to avoid changing:
 - Identifies specific differences, field by field

Acceptable enhancements to RDA monograph records

1XX	Main entry/creator	Correct typos as necessary to synchronize with authority file forms.
245	Title proper, etc.	<p>Correct cataloger typos, indicators, MARC content designation, etc. However, see table 2 for inaccuracies on the resource itself. Please accept capitalization found in the record, unless egregiously wrong.</p> <p>May also add statements of responsibility, affiliations, etc., not transcribed by the original cataloger if desired, following RDA style. For example, if the statement of responsibility includes the phrase “[and 3 others]”, feel free to replace that statement with the actual transcribed information.</p>
246	Variant titles	Add to enhance access, as desired.
260	Publication, etc.	Transcribe additional places/publishers from the source of information if not in the record—use the style of RDA (generally ‘take what you see’) rather than modifying as AACR2 prescribes.

Table 2: Things to avoid changing in RDA records

MARC	Element	Action
040 \$e	Description conventions	Do not remove 'rda'
100/110/111	Main entry/creator	Do not change the choice of entry. For example: <ul style="list-style-type: none">• in RDA, works of collaboration will have a 1XX where they didn't in AACR2 (rule of three no longer relevant).• in RDA, compilations by different creators will not have a 100/110/111 where they did in AACR2
100 Ind1=3	Main entry/family name	Do not remove a family name as creator; concept not valid in AACR2
130	Uniform title/Authorized access point for the work	Generally do not add or delete. For example, RDA has different requirements for: <ul style="list-style-type: none">• identifying the first/predominant work in a compilation• identifying more than one expression of the same work (e.g., original version and one or more translation are not treated in the same \$1)