OCLC and RDA:

What We Learned in the Test and What's Next

PTPL

October 2011

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Glenn Patton
Director
WorldCat Quality Management

For today

- **Getting ready for the test**

- **Learning from the test**

- **Looking toward implementation**

RDA Testing

- OCLC worked with LC, NAL and NLM to provide support:
  - Creating RDA MARC 21 bibliographic and authority records in Connexion
  - Working with RDA records in all interfaces
  - Working with RDA records in Batchloading

- OCLC's Contract Cataloging Services team agreed to participate

- Initial MARC 21 changes were installed on May 23, 2010.

  - http://www.oclc.org/support/documentation/worldcat/tb/258/default.htm
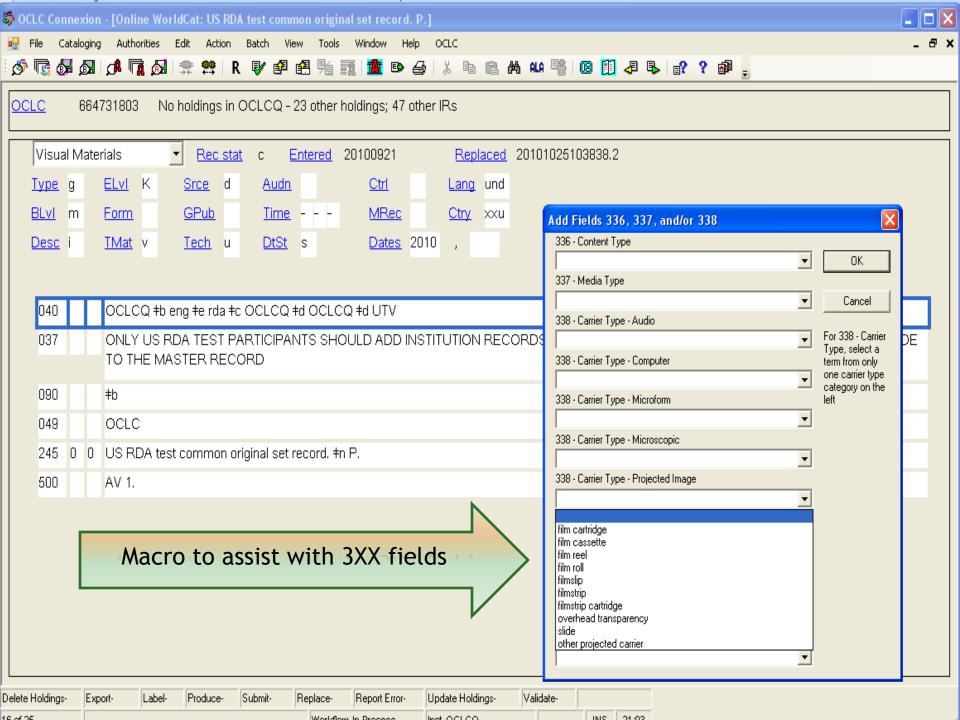
MARC 21 changes

- Bibliographic records:

  - 040 ǂe code 'rda' to identify the rules used

  - New fields for content type, media type and carrier type

    - Field 336 – Content type

    - Field 337 – Media type

    - Field 338 – Carrier type

- Authority records:

  - 040 ǂe code 'rda' to identify the rules used

  - Other fields for entity attributes

In addition to the MARC 21 changes

- **Indexing/searching**

  - **New indexes**

    - **Descriptive conventions (dx:) in bibliographic records**

    - **Entity attributes (en:) and Relationship (rx:) in authorities**

  - **MARC fields 336-338 integrated into indexing structures**

- **Existing functionality**

  - **Institution records**

  - **Existing "submit for review" functionality**

  - **Existing Batchloading matching**

OCLC & RDA during the testing period

- **OCLC developed a document titled:**

  OCLC Policy Statement on RDA Cataloging in WorldCat for the U.S. Testing Period

  - Linked from the OCLC RDA Resource page at
    http://www.oclc.org/us/en/rda/about.htm

➢**Institutions not participating in the test could (and did) contribute original RDA records to WorldCat during testing.**

➢**Coding: 040 $e rda and Leader/18 (*Desc*) coded "i" if ISBD punctuation is used or "blank" if ISBD is not used.**

Since the test …

- **Connexion interface changes**

  - ✓ **Links to RDA Toolkit (completed April/May 2011)**

- **Additional MARC 21 changes**

  - ✓ **MARC 21 Update no. 12 implemented May 2011**

    http://www.oclc.org/us/en/support/documentation/worldcat/tb/260/default.htm

- **Additional indexing**

  - • **Entity attributes (en:) in bibliographic records**

Still to be done...

- **Connexion interface changes**

  - **Workforms/Macros**

    - **RDA workforms to be part of Connexion client version 2.40**

- **Re-evaluation of some of the indexing decisions**

- **Additional MARC 21 changes from Update no. 13**

  - **New 264 field**

Learning from supporting the test

- **Record matching implications**

  - Abbreviations vs. spelled-out words

  - "Transcribe what you see"

  - Systematic evaluation of matching still to be done

- **Additional validation rules to insure correct coding**

- **Need for more communications with member libraries not involved in the test**

Learning from participating in the test

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- Explaining the logic behind RDA is critical

- Phased training/implementation may be inevitable

- Need to work individually with all institutions for whom we do cataloging

What our catalogers liked

- Explicitly stating relationships between access points and item being described

- Additional information in authority records

- LC-created workflows

- "Take what you see"

- Emphasis on the end user

What could use more work

- **Clearer guidance on what access points are necessary for different types of manifestations/items**

- **Better navigation within the RDA Toolkit**

Looking toward implementation

- **OCLC is working in close cooperation with the U.S. National Libraries and with the Program for Cooperative Cataloging (PCC) to plan the implementation.**

    - Potential conversions of authority records

    - Hybrid records

- Later this year, OCLC intends to issue a discussion paper regarding the possible future of bibliographic records with mixed practices in WorldCat.

- Some topics

  - Recataloging to RDA

  - Updating/adding individual fields

  - Spelling out abbreviations

- Watch for an invitation to comment

Looking to the future

- **End-user focus**

    - **Close alignment to the FRBR user tasks**

    - **Explicit statement of relationships between access points and the resource being described**

- **Database structures to support linked data**

> In order to make your published open data useful for others, you have to make implicit relations explicit.
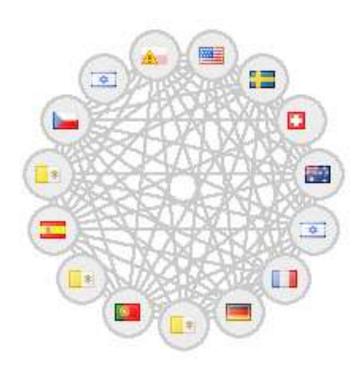>
> --Lukas Koster*

* http://commonplace.net/2011/03/missing-links/

Looking to the future

- **Additional information in authority records**

    - **Specific dates**

    - **Associated place**

    - **Address**

    - **Field of activity**

    - **Occupation**

    - **Gender**

    - **Associated language**

    - **Etc. …**

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