



International Federation of
Library Associations and Institutions

IFLA Cataloguing Section - SC Midterm meeting

Bibliothèque nationale de France, Paris, April 29 2016

Attendance

Nesrine Abdelmeguid Mohamed Abdelmeguid (Bibliotheca Alexandrina, Egypt) *(By Skype)*

Vincent Boulet (Bibliothèque nationale de France)

Barbora Drobiková (Charles University in Prague, Czech Republic)

Henriette Fog (Royal Library, Copenhagen University Library, Denmark)

Agnese Galeffi (Vatican School of Library Science, Italy) *(By Skype)*

Massimo Gentili-Tedeschi (Istituto Centrale per il Catalogo Unico, Italy)

Alejandra Muñoz Gómez (Library of Congress of Chile) *(By Skype)*

Hanne Hørl Hansen (Danish Bibliographic Center, Denmark)

Patrick Le Boeuf (Bibliothèque nationale de France)

Susan R. Morris (Library of Congress, USA) *(By Skype)*

Ricardo Santos (National Library of Spain) *(By Skype)*

Miriam Säfström (National Library of Sweden)

Corresponding member: Renate Behrens (German National Library)

Observers

Françoise Leresche (Bibliothèque nationale de France)

Mélanie Roche (Bibliothèque nationale de France)

Mathilde Koskas (Bibliothèque nationale de France)

Agenda

Chair: Miriam Säfström, secretary: Hanne Hørl Hansen

1. **Welcome, introduction, status reports from the CATS SC review groups and information on ongoing activities**

Miriam welcomed both present members as well as members who attended by Skype.

She outlined the terms for the meeting we decided on in Cape Town 2015: The meeting will not make decisions as many of the members didn't have the opportunity to participate, but we will use the meeting for a deeper dialogue as well as prepare for decisions on our ordinary 2016-SC-meeting in Columbus, Ohio.

Status reports from the Review Groups:

Massimo: The **ISBD RG** had prepared an analysis of area 2 (edition-area) (Appendix I) parallel to the analysis of area 1 (title) presented in Cape Town by the ISBD RG. The analysis has been done in order to secure that all type of problems are discovered.

Massimo highlighted some of the problems and questions the analysis presents, that are in part common with the issues found for area 1:

- There is a difference in the definition of *edition* in ISBD/RDA.
- Should ISBD's first categorization criteria be element/property as identified in the namespace (RDF representation)?
- Should each element be defined as to its Mandatory/Repeatable status?
- Should each element be introduced by an explicit definition, to be followed by clearly defined rules?
- Should the revised version of ISBD accommodate both "Resource" and "WEMI" terminologies, so as to fit both an FRBRised and a non-FRBRised description?
- Mapping to FRBRer is almost accomplished, will there be need of mapping with FRBR-LRM?
- Should notes be ordered accordingly to WEMI elements?
- How to describe relationships between data?
- Should the ISBD be based on "self description" or description by cataloguers, where for example data could be corrected if misprinted?
- Should an ISBD description be prepared for direct use of human beings or machines to read and mediate? Perhaps including guidelines on how to aggregate data for a full record in order to display?

All these questions and angles leads back to the basic discussion about what the ISBD should be in the future and how the standard works with our other standards. Miriam apologized for not having being able to pursue the task on clarification of the standards correlations so far – hopefully the calendar will allow time soon. To find the answer to the question is not entirely up to the CATS SC alone. The Committee on Standards might also have to consider the question in connection with the future directions for UNIMARC (harmonization with FRBR- LRM, ISBD and ICP).

The ISDB RG will prepare the report further.

A way forward might be having descriptive principles followed by a set of suggested rules to that principle. Still all the questions above would need to be unraveled.

FRBR RG.

We have not ask the group for a formal report in advance, but Patrice, member of the FRBR RG, gave a personal view on the FRBR LRM world wide review which has deadline on May 1.

He was personally surprised by the extent of interest!

By the comments he might regret that a new terminology was not introduced. Some comments seem to review the FRBR-LRM as a comparison to the current FRBR without taking into notice that the scope of FRBR-LRM integrate much more than FRBR.

The FRBR RG has gone through the world wide review perfectly according to the procedure, but some have objected and are skeptical towards the reviewing process. They would have preferred a public review process, where you would be able to follow and discuss others reviews. A blog – not on the initiative by the FRBR RG - has been created and 5 comments have been posted so far. The FRBR RG decided not to respond at the blog because not every list or blog can be monitored, but Patrice asked the question whether the comments on the blog should be taken into account when looking into the reviews?

Should all comments be made available to the community? There is no intention to do so, but Maja and Patrice will meet prior to IFLA and look into the comments. The comments might be public in conjunction with the answers to the comments from the FRBR RG.

The process reveals questions for the procedure on world wide reviews which should be addressed to the Committee on Standard.

Agnese called for a procedure on how to integrate explanations of the choices made.

We might have been too optimistic about the time frame. It is not possible to both incorporate changes, give answers etc.

Miriam summarized the comments. It might be necessary giving the group 6 more months more and approve on a new plan in August when the group has have an opportunity to discuss the plan.

We might consider planning a satellite meeting after the publication of FRBR-LRM, with the purpose of practicing how to catalogue in a FRBR'ized world.

2. Proposed revision of GARR (Guidelines for Authority Records and References (Drobíková)

Barbora presented a status for GARR (Appendix II)

The message was: The guidelines are published on our website (except the part on classification) but has not been revised since 2001. We are talking about authority data being the major player in the future. We need to revise it.

Vincent expressed his interest in this as well: He had a list of questions about scope, identifiers and entity registration.

Also Henriette expressed her interest, particularly on identifiers.

Massimo saw GARR as a part of the IFLA framework on standards.

Hanne suggested to invite VIAF to corporate. As Ricardo seems to be the next chair of VIAF, he will be willing to contribute.

We agreed to consider GARR as a set of guidelines (which Renate pointed out also are of interest to other communities such as museums and archives). Barbora, Henriette and Vincent will prepare a suggestion for revision for our ordinary next SC-meeting and according to the IFLA manual for making and maintaining standards.

3. CATS' IFLA Standard group

As mentioned above the group has not started yet.

4. Presentations from the individual SC members: what is the current situation in the cataloguing community they represent, challenges, expectations on the CATS SC: how can the section contribute to solve problems and meet the needs of the wider community. Each members talks about 5-15 minutes. Questions, discussion

In Appendix III written reports from Argentina, Chile, The Czech Republic, Denmark, Egypt, Finland, France, Germany, Norway and USA are collected. Italy, Spain and Sweden gave a short oral presentation at the meeting and Italy provided a written report after the meeting.

The reports show similar areas of interest among the countries:

- Many are working towards FRBR'ized cataloguing. The majority within the framework of RDA but also within other rules: France will have new national rules (based on RDA), in Italy REICAT is based on FRBR, Spain is divided – BNE uses ISBD and a national code for access points while the Biblioteca de Catalunya uses RDA.
What it means to implement RDA has been interpreted very differently: From just switching to the English text recommending to incorporate the RDA core data within in the current data model to: translating, making profiles, collaborating with other countries in the region, prepare changing to new data models etc. Also tools for really cataloguing FRBR'ized and not only within a traditional bibliographic MARC-record are missing.
LC is hiring staff again – the first generation cataloguing in RDA without having the traditional cataloguing history in mind.
- Many are working on establishing national authority files or improving authority data. Focus on identifiers. For quite a while there have spoken about cooperation with archives and museums on metadata. The authority files including identifiers might be the most obvious area to cooperate within.
- There is a need for different levels of cataloguing for all kind of entities and also we must be aware that we don't have to treat all kind of resources at the same level.
- Some countries have been experimenting with linked data– it is now time for a more sustainable strategy on linked data.

Miriam summarized:

Everyone has a relation to RDA even though they haven't implemented it or have plans to do so. Everyone can agree that we are moving towards cataloguing within the framework of FRBR and as it is for now, RDA represents the only code based on FRBR.

The huge focus on authority data makes taking up the revision of GARR most relevant.

The amount of online materials, pictures and movies challenges our traditional way of cataloguing by having the item in hand and thereby the code for and levels of cataloguing.

It seems like the Cataloguing Section is on the right track by prioritizing the consolidation of the FR models and taking up discussions about the guidelines for authority data.

5. Update on activities on and around IFLA WLIC 2016, satellite meetings (RDA and VIAF), open programme etc

Hanne reported on the planning of the satellite meeting *RDA in the wider world*, which takes place on August 11 – prior to IFLA. Everything is in order. For more information about the programme etc. see <https://www.eventbrite.com/e/rda-in-the-wider-world-tickets-19406498359>

As member of the VIAF board Vincent reported on the halfday satellite meeting on VIAF/Authority data – also at OCLC – on August 12 in connection with the VIAF meeting. To his knowledge not much have been planned so far – only the timeframe and host.

Miriam reported on our open programme for IFLA. We have worked together with the IT section and therefore have a 3-hour timeslot. We will present five really good papers.

6. End notes, closing of the meeting

As this - to our knowledge - was the first midterm meeting in the Cataloguing Section we reviewed having midterm meetings.

We all agreed that having time for a more comprehensive and less formal dialogue about issues important to our daily work gives a much better understanding of both similarities and differences around the world. At the same time the importance of strategic discussions is stressed as the cataloguing community seems to have reached a paradigm shift in the practice of cataloguing. The review of FRBR-LRM is testing the process of evaluation of standard recommended by the Committee on Standards.

We all thanked BNF for giving us the possibility to meet and being such a splendid host!

Appendix I A: ISBD Edition area for IFLA CATS (attached file)

Appendix I B: Revision of ISBD, Area 2: Discussion paper (revised July 2016)

Revision of ISBD, Area 2: Discussion paper

Final draft, 29.6.2016

Prepared by Massimo Gentili-Tedeschi, ISBD Review Group chair for the IFLA Cataloguing Section's Standing Committee with comments from Elena Escolano Rodriguez, Françoise Leresche, Dorothy McGarry and Mirna Willer.

INTRODUCTION

This paper follows the Discussion paper on the revision of ISBD: International Standard Bibliographic Description¹, presented by Mirna Willer and Gordon Dunsire to the Cataloguing Section at the WLIC Session of the Cataloguing Section's Standing Committee in August 2015.

That paper presented an outline of the framework at the origin of the request for an analysis of the present state of the ISBD, to test the possible direction of the revision according to two possible strategic scenarios envisaged by the SC: A2 (continue the content of ISBD on the current level but change to reflect FRBR) and C (plan for a shorter and more principles-based ISBD), and to identify the issues needing further discussion. The focus was then an analysis of ISBD Area 1 (and in particular, its first element 1.1 Title proper), discussing issues concerning in particular linked data issues and FRBR terminology and modelling issues. Specific questions were raised, followed by more general topics/issues for consideration.

This paper is based on a similar analysis of Area 2 Edition, and will not repeat the introduction, but will by force of circumstances repeat many of the issues raised and of the conclusions of the previous report.

DISCUSSION AND QUESTIONS

The analysis took into account the following documentation, updating and integrating with new documents that used for the previous discussion paper: registered ISBD namespaces² according to the list of elements published in ISBD (p. 14-17), the draft Guidelines for use of ISBD as linked data (in preparation by the ISBD Linked Data Study Group, the ISBD Description Set Profile Version 4.0,³ the draft ISBD/FRBR alignment, the

¹ Revision of ISBD: Discussion paper - Draft, ver. 1.0, 26-06-2015.

² <http://iflstandards.info/ns/isbd/>. See also: Open Metadata Registry (OMR), <http://metadataregistry.org/schema/show/id/25.html>, and ISBD RG. ISBD namespaces published, <http://www.ifla.org/news/isbd-namespaces-published?og=628>.

³ http://www.ifla.org/files/assets/cataloguing/isbdrg/dsp_isbd_ver4.zip.

draft of the new FRBR-LRM model,⁴ Resource (ISBD) and WEMI (FRBRer) semantic relationship,⁵ and related Alignment of the ISBD with RDA⁶ and ISBD profile in RDA.⁷

The area analysed for this paper was 2 Edition area; as already said, some of the issues raised for area 1 may be repeated for area 2, even if some appear less crucial.

These issues are:

1. Linked data issues:

- a. The declaration for the Edition statement element (property) is that it is “mandatory if available” alongside the element, but there is an instruction, 2.1.4 Edition statements not transcribed in the edition area, not to repeat it in area 2 if already transcribed in another area (examples mention only area 1).
- b. There is no information as to the cardinality of area 2 (not repeatable); it is assumed from the A.3.1 Outline of the ISBD and from paragraph 2.4 Additional edition statement.
- c. The ISBD alignment with RDA and REICAT⁸ is marked as equivalent; this is true with REICAT, but the ISBD definition of Edition is instead more restrictive than the definition in RDA:

in ISBD Glossary, Edition is defined as follows:

all copies of a resource produced from substantially the same original input and issued by the same agency or group of agencies or a person. For older monographic resources, all copies of a resource printed at any time from substantially the same type-pages (see also facsimile reproduction, impression, issue <printed monographic resources>, state <older monographic resources>, type-forme, type-page, variant copy)

in RDA 2.5.2, Designation of edition is defined as follows:

A designation of edition is a word, character, or group of words and/or characters, identifying the edition to which a resource belongs.

Note that in some languages the same term or terms can be used to indicate both edition and printing. A statement detailing the number of copies printed is not a designation of edition.

In case of doubt about whether a statement is a designation of edition, consider the presence of these words or statements as evidence that it is a designation of edition:

- a) a word such as edition, issue, release, level, state, or update (or its equivalent in another language)

or

⁴ http://www.ifla.org/files/assets/cataloguing/frbr-lrm/frbr-lrm_20160225.pdf.

⁵ <http://www.ifla.org/files/assets/cataloguing/isbd/OtherDocumentation/resource-wemi.pdf>.

⁶ http://www.ifla.org/files/assets/cataloguing/isbd/OtherDocumentation/isbd2rda_alignment_v3_1.pdf.

⁷ http://www.ifla.org/files/assets/cataloguing/isbd/OtherDocumentation/isbd2rda_alignment_v3_1.pdf.

⁸ See Alignment of ISBD with RDA and REICAT. Version 1.0 by Simone Forassiepi, University of Florence, Italy under the supervision of Professor Mauro Guerrini (11 April 2013), http://www.ifla.org/files/assets/cataloguing/isbd/OtherDocumentation/isbd-rda-reicat_table.pdf.

- b) a statement indicating:
 - i) a difference in content
 - ii) a difference in geographic coverage
 - iii) a difference in language
 - iv) a difference in audience
 - v) a particular format or physical presentation
 - vi) a different date associated with the content
 - vii) a particular voice range or format of notated music.

For area 2 the issues of the presence of sub-properties “within” one element has not been noticed, nor an issue such as the existence of a common title and a dependent title; additional edition statements and statements of responsibilities are defined in two dedicated paragraphs. As a consequence, there is a 1 t 1 correspondence between explicit declarations of categories in the set of rules of the ISBD and elements/properties in the OMR.

However, the prescribed punctuation that precedes the element Additional edition statement –comma space (,) – may not be unambiguous in identifying that element, when a comma is present in the transcription of the preceding elements.

All questions following the analysis are identical to those identified for area 1:

- I. Should ISBD’s first categorization criteria be element/property as identified in the namespace (RDF representation)?
- II. Should each element be defined as to its Mandatory/Repeatable status?
- III. Should each element be introduced by an explicit definition, to be followed by clearly defined rules?
- IV. Where and how to deal with the order of elements, and the punctuation pattern in relation to the element, and area statement?

2. FRBR terminology and modelling issues:

From the point of view of both FRBRer and FRBR-LRM, as a transcribed area, area 2 appears as fully pertaining to the Manifestation.

However, area 2 is very interesting for FRBRisation issues, as its presence gives some signal of specific relationships: either it indicates that the Manifestation embodies a new (revised, updated, enlarged, etc.) edition of the embodied Work, i.e. in FRBR terms a new Expression that has to be described, or, it indicates that the Manifestation is a reproduction of another Manifestation (e.g. a facsimile reproduction), with relationships between them that have to be established.

This is why its analysis could be very interesting in preparing a new ISBD reflecting FRBRised cataloguing needs.

3. Summary of extant issues raised in the previous report (updated)

The declared ISBD constrained and unconstrained properties, ISBD/FRBR namespaces mapping and Resource/WEMI semantic relationship documents point to two possibilities of treating bibliographic linked data.

Questions:

- I. How to express in one document the fact that ISBD namespaces can refer to (have domain) the Resource and/or the WEMI?

- II. What terminology to use?
- III. Should the revised version of ISBD accommodate both “Resource” and “WEMI” terminologies, so as to fit both an FRBRised and a non-FRBRised description?
- IV. What are the practical terms of such an accommodation? Should the core of the text be the same, irrespective of the context, while an Appendix might direct to FRBRised cataloguing (issuing warnings of the kind “such element populates such WEMI term”)?
- V. Should the notes area be rearranged by related FRBR entity, or point to such an arrangement in an appendix, or both?

The above questions raised further topics/issues for consideration (updated):

- What ISBD is for, and where it fits into the set of bibliographic standards, and subsequently:
 - o How the development of the various bibliographic standards fits together.
 - o Has the Cataloguing Section a schedule showing dependencies, parallel processes, etc.?
 - o How does the work internal to the IFLA standards groups interact with the Committee on Standards?
 - o How does it synchronize its activities with FRBR consolidation and ICP, as well as with other standards such as UNIMARC, ISSN and cataloguing rules such as RDA?
 - o The question of interoperability: the fact that there exist diverging analyses of ISBD is the main obstacle to FRBRisation. As long as we do not map the same ISBD elements to the same WEMI terms, the revision process will be stalled, and record exchanges will be increasingly difficult, especially in the RDF world to come.
- What a principles-based standard should look like:
 - o Would the principle-based ISBD scenario force us to leave ISBD as descriptive rules or as a content standard?
 - o Should ISBD remain a tool for identification and for constructing exchangeable aggregated statements as it is now, and at the same time fit that into the FRBR-LRM building appropriately?
 - o Some proposals for the revision of ISBD document itself regardless of the basic changes in the structure and the technology are: revision of the terminology (FRBR-LRM, RDA, etc.), punctuation not included in ISBD, simplify the stipulations of sources of information, simplify the stipulations of mandatory elements, no use of abbreviations, etc.
 - o Would such an approach make ISBD lighter and easier to use?
 - o Would alignments and mappings with RDA enable harmonization between data produced according to the ISBD or RDA metadata content rules, and as a consequence will the use of ISBD as a record syntax as defined in RDA Appendix D still be possible?
- If we treat each element as a property on its own, how should the text of the standard look like? It appears that it would look like a reference manual, not a procedural manual, that is, it would primarily focus on data, not on workflow. This would assume declaration of:
 - o The values in description for each data element (property): name, definition, domain, attributes and relationships.
 - o The approach/building of elements should be based on a “bottom-up analysis”, based on user needs and oriented towards the future, without taking into account the limits of legacy data and their structure **(1) How you populate data elements with data**.
 - o Obviously, a fresh look is needed: start building description based on a decision tree, for example, establish an element **(1.1 extract the data elements)**, and the instructions **(1.2 take out rules)** specifying what to do with that: where to find data on the resource, how to transcribe, what to do if no data appear on the source, etc.
- The next phase is to scope these elements into what ISBD is:

- There is a need for rules on how to assemble data, that is, how to construct a statement from elements [this is very different from RDA: it does not deal with this, but refers to ISBD syntax; also see the discussion about relationships below]: **(2) How you aggregate these data further to aggregated statements and to a full record for human readable display.**
- ISBD “punctuation pattern” is one way of doing it for libraries and similar resources, but ISBD data could be used for various other purposes too.
- This is an issue for an Application Profile – it cannot be expected that there will be ONE universal AP; each application of bibliographic data will be developing its own, like RDA, ISAD(G)⁹ or CCO;¹⁰ also, each local use could define its AP but use data “produced” by applying ISBD rules.
- **(3) How to describe relationships.** We can use the RDA methods for relationships between data: (1) unstructured data, (2) structured descriptions – in which case we need the “punctuation pattern” provided by ISBD [RDA has to rely on ISBD, as it does not define how to build aggregated statements], (3) authorized access points and (4) identifiers, both need being URIs.
 - **OR:** Should the definitions of elements focus on the description of manifestations and their content, and should not therefore be concerned with the structuring language of data: aggregated statements, punctuation and the prescribed order of elements should be included in an Appendix, since their main goal is to facilitate record exchange beyond linguistic barriers. Likewise, access points and identifiers exceed the scope of ISBD?
- The context of resource self-description vs. cataloguer as a creator of a description (ISBD in 1.3., 1.4 and 1.5 describes a process):
 - Should ISBD description be based on publisher’s data (or even on the image of data) or cataloguer’s mediation/interpretation of that data (e.g., corrections)?
 - **(4) What is ISBD function in terms of description and retrieval.** Do such mediations improve information in data, and do such corrections have use for humans or not?
 - We should consider the fact that ISBD was built primarily for the identification of a resource in the context of national bibliographies (Universal Bibliographic Control): this objective is still valid today; as far as ISBD is concerned, identification takes precedence over retrieval – even if that means splitting identification and access.

Respectfully submitted

Massimo Gentili-Tedeschi, chair of the ISBD Review Group

Paris, 29 April 2016

⁹ General International Standard Archival Description, see <http://www.ica.org/en/isadg-general-international-standard-archival-description-second-edition>.

¹⁰ Cataloging Cultural Objects: a guide to describing cultural works and their images, <http://cco.vrafoundation.org/>.

Appendix II: GARR : Guidelines for authority records and references: an invitation to revision (attached file)

Appendix III : Reports etc. from Argentina, Chile, The Czech Republic, Denmark, Egypt, Finland, France, Germany, Italy, Norway and USA

Argentina

Report for CATS Midterm Meeting: Argentina

Argentina doesn't have a national cataloguing code. Libraries use a mixture of AACR2, ISBD and now some of them are starting to use RDA. Cataloguing is very decentralized and each library takes its own decision according to the resources and time available. Many libraries do original cataloguing, and use other library OPACs as examples or to clarify any doubts (OCLC is not used in Argentina).

There hasn't been a general decision by the National Library of Argentina to start using RDA. However, the National Library has conformed an RDA Working Group in 2012, to analyze RDA as a new cataloguing code, and consider its implementation and future use in our country. This group had regular meetings from 2012 to 2015, all minutes are available in the website:

<http://www.bn.gov.ar/grupo-de-trabajo-sobre-rda>

In December 2015, the group published a report with the conclusions of the analysis:

<http://www.bn.gov.ar/media/page/comparacion-rda-aacr2.pdf> and a set of record examples of literature classics from Argentina both using AACR2 and RDA to better show the differences of cataloguing with one code and the other: <http://www.bn.gov.ar/media/page/ejemplos-rdaaacr2.pdf>

Most library schools continue to teach cataloguing with AACR2 and ISBD Consolidated Edition, although some of them are starting to include RDA in the curriculum. The Spanish version of RDA wasn't available until March 2015, and it wasn't until a few months later that people could subscribe or buy this new translation.

In October 2015 the National Library of Argentina organized the "V Encuentro Nacional de Catalogadores" (V National Cataloguers' Meeting). All presentations are available:

<http://www.bn.gov.ar/evento/v-encuentro-nacional-de-catalogadores-2> Linked Open Data and Semantic Web were topics included in the call for papers, but there was only one presentation about RDF: "*De MARC21 a RDF: migración o harvesting utilizando FOSS*".

Conclusions of the Cataloguing Committee during the "V Encuentro Nacional de Catalogadores" are available here: <http://www.bn.gov.ar/media/page/conclusiones-comision-catalogacion.pdf>

The general message regarding a transition to a new code was to wait until more records are available to take advantage of copy cataloguing, and to start studying the new code to be prepared.

Maria Violeta Bertolini (member of the CATS) gave a presentation about the work of the Cataloguing Section and the ICP Working Group in the update of the International Cataloguing Principles (ICP): "*Actualización de los Principios Internacionales de Catalogación*" ([Presentation](#))

was delivered by a colleague since I am currently living in Washington, DC).

Respectfully submitted,

Maria Violeta Bertolini¹, April 2016

¹ This report includes only the personal views of the author and it is not an official statement from Argentina or any particular institution.

Chile

REPORT OF CATALOGUING IN CHILE FOR THE SC MIDTERM MEETING

Librarian National Environment and RDA

- Most Chilean libraries (public and university libraries) use mainly for document description AACR2 (2nd edition revised 2004) and the MARC 21 format
- For the classification of documents use Dewey (21 printed edition) and List of Subject Headings (LEMB)

In my country catalogers use mainly:

- the Website of the National Library (Standards and bibliographic standards)
<http://biblioestandares.bn.cl/>
- MARC Website in Spanish
<http://www.loc.gov/marc/marcspa.html>
- and consulting colleagues to be a day in the area of cataloguing
- In 2009, when appeared the new cataloging rules RDA in Chilean libraries, especially in the National Library of Chile and in the Library of the National Congress of Chile, a group of librarians decided to start to study the new standard they were only in English
- In 2010 it was created "RDA-Chile Interest Group" (GIRCH), with the participation of librarians from different institutions in order to study the new standard
- However, in 2013 the GIRCH group ceased its functions
- The issue of the application of the RDA at the country level it's stalled
- Started working locally on each interested library to apply this standard

Library of Congress of Chile and RDA

The Library of Congress of Chile (BCN), in August 2012 generated a project "Implementation of cataloging model RDA in BCN"

With a training plan in BCN for librarians and library technicians of the Production Department of Information Resources

It was implemented in bibliographic and authority records using new fields generated in MARC 21 format

BCN pioneer in using the standard RDA in Chile

Training in RDA standard: realization of workshop guided practice (bibliographic and authority records RDA). BCN provided training to librarians of institutions such as National Library, library of the Supreme Court, Library of the Catholic University, Library University of Santiago

Others libraries of Chile and RDA

In 2014 the Library System of the University of Concepcion also decided to apply RDA to all bibliographic records and in 2015 their authority records

<http://www.biblioteca.udec.cl/>

Libraries of private universities like the Library of the University Alberto Hurtado (2013)

<http://www.uahurtado.cl/biblioteca/>

Authority Control Unit (UCA)

At the national level exist an authority control unit (UCA) which aims to examine, study records that raise questions and they are part of the Collective Catalog of Authorities (CCAB)

In this Unit participating librarians of the National Library, Library of Congress, Catholic University and University of Santiago

They meet once a month at the National Library

Collective Catalog of Authorities (CCAB)

Proprietary libraries of records author and subject of the Collective Catalogue of Bibliographical Authorities are: National Library of Chile, Library of Congress and Library of the Catholic University

Available in: www.bncatalogo.cl/ccab collective catalog of authorities

Certification of the Library of Congress of Chile in NACO

In next May 2016:

- Participation in NACO Training Workshop: “Creating records with authorities guidelines RDA / FRAD / MARC21”
- Certification of BCN by NACO/Library of Congress USA

Alejandra Muñoz G., April 2016

Czech Republic

Czech cataloguing policy

Barbora Drobíková

(This text is not an official statement of the Czech Cataloguing Policy Board. It contains opinions and subjective approaches of the author).

RDA has been defined as the only cataloguing standard in the Czech Republic since May 2015. The ISBD punctuation is used within bibliographic records in the MARC 21 format. MARC 21 is set as the exchange format in the Czech Republic especially for the cooperation within the Union Catalogue of the Czech Republic – CASLIN.

The Cataloguing Policy Board has decided not to translate the RDA code into Czech for now because of lack of money for the translation and because of continual fast changes in the code. (Formerly AACR2 and all additions and revisions were translated into Czech). Probably only big libraries (National Library of the Czech Rep., some academic and special libraries, big regional libraries) have subscribed an access to the RDA Toolkit.

Cataloguers from the Czech National Library have prepared a [web portal](#) for cataloguing (originally used for AACR2 purposes too). They have created a [handbook for cataloguing according to RDA in the MARC 21 format](#) which is updated continuously. The web portal offers various tools for cataloguers too, including presentations for cataloguing trainers, examples of bibliographic records, approved documents, additions to MARC 21 format – fields 336-338.

Cataloguers in the Czech Republic should follow documents approved by the Czech Cataloguing Policy Board and Cataloguing Working Groups (monographs, special documents, serials, etc.). As an example of one of the most important document is: [The minimal / recommended level for bibliographic records for the Union Catalogue](#) – CASLIN which is defined on the basis of the MARC 21 format for various types of documents.

Questions to the RDA code (from cataloguers from the entire republic) are answered via a tool: [“Questions to cataloguing”](#). It was created in 2000 for AACR2 purposes by the National Library and is used now for RDA too. Cataloguers can ask any question concerning RDA paragraphs, particular books/serials/special documents. Questions are answered especially by cataloguers from the National Library. Questions and answers are sent by email from this tool to everybody who is registered in the Czech cataloguing email conference Katpol. Answers create often foundations for particular national interpretations of the code (concerning language differences and others).

We do not have a sufficient feedback about the implementation of RDA from practice. I have personally met views which unfortunately show that cataloguers do not see a difference between AACR2 and RDA code, probably because of using of MARC 21 format and the “minimal level for bibliographic records” for the Czech Union Catalogue. Some cataloguers complain about “too much work” (all authors have to be listed, elimination of abbreviations, focus on new elements – preferred title of work etc.). With help of my students we will examine this issue step by step.

Prague, April 26, 2016

Denmark

Dear Colleagues

The Danish Bibliographic Council has just finalized a recommendation to the Danish Agency for Culture and Palaces advocating for a Danish move to RDA (the English original text supported by a Danish vocabulary and a Danish profile) as well as a recommendation on a Danish national strategy on authority data including a national repository on authority data.

It is now up to the Agency for Culture and Palaces to decide whether they will follow the recommendations and replace the national rules with RDA and take the necessary initiatives to implement RDA as well as the authority data strategy or not.

Danish libraries have a very well-implemented infrastructure with an union catalogue, which include the national bibliography and records and holdings from all specialized and academic libraries as well as public libraries in Denmark. The union catalogue has an interface to the public <https://bibliotek.dk/eng>.

You can order most materials from any library in the country for pickup at your local library - some materials are online and gives you direct access to them.

To maintain this user friendly infrastructure, decisions on which cataloguing code to follow as well as bibliographic cooperation on authority data is decided by the authorities and not by the libraries individually, so if the Danish Agency for Culture and Palaces decides for RDA all libraries will have to move to RDA.

Trends:

- There is a strong movement in the libraries from seeing the catalogue as an isolated object towards mixing the catalogue with other information sources with full text. This means that we have to extract metadata from other sources than library sources and make them work together with library metadata. This also demonstrates the need for methods for automatically enriching metadata for example when mixing authority data with non-authoritative forms.
- There is a strong need for mediation of the work as a whole instead of single manifestations.
- Strengthen national initiatives for the formation of relations between metadata

Kind regards

Henriette Fog and Hanne Hørl Hansen

Egypt - Attached powerpoint plus:

Bibliotheca Alexandrina Cataloguing concerns

The Library of Alexandria and the BA cataloguing section is focusing on four main objectives.

1. The world's window on Egypt.
2. Egypt's window on the world.
3. A leading institution of the digital age.
4. A center for learning, tolerance, dialogue and understanding

I- World's window on Egypt

The objective of being The world's window on Egypt is conveyed through:

1. DDC expansion and DDC translation
2. Arabic subject headings and Arabic name authority file
3. Arabic Edition of MARC 21 Format for Bibliographic Data

II- Egypt's window on the world

❖ **RDA**

The BA is in a transitory phase to apply the RDA as anew cataloguing standard, being the structure based on the conceptual models of FRBR and FRAD to help catalog users find the information they need more easily.

This **flexible framework** for content description of digital resources will also serve the needs of libraries organizing traditional resources.

❖ **Bibframe**

Also the BA specialists are following closely the development associated with the Bibframe datamodel being the replacement of Marc at a certain time and where Resources are described with an assembly of metadata pieces which can be mixed and matched as needed.

The BA is the only Arabic library member of the testing group of the BIBFRAME.

III- Leading institution of the digital age

❖ **DAR**

The Digital Assets Repository (DAR) is a repository developed by the BA to maintain the Library's digital collections. Moreover, it provides public access to digitized collections through a web-based search and browsing facility.

IV- Center for learning, tolerance, dialogue and understanding

❖ **ILTP**

The International Librarianship Training Program (ILTP) at the Bibliotheca Alexandrina (BA) is a program to train librarians on the latest techniques in the field of library and information science, especially in Egypt, the Arab Region, and Africa.

In conclusion, the BA role will help in linking the world heritage to the Arabic heritage and vice versa.

Finland

Report from Finland on cataloguing issues for the Midterm meeting of SC 2016-04-26

Cataloguing standards

Standards for descriptive cataloguing in Finland are

- ISBD Consolidated, the Finnish translation of ISBD is available on the site of the National Library of Finland
- RDA, the Finnish translation of RDA on RDA Toolkit

The National Library of Finland (NLF) gives support to Finnish libraries in applying the standards of descriptive cataloguing. The support includes up-to-date Finnish translations, national guidelines, workflows and other instructions. NLF also organizes training sessions. In addition to cataloguing rules, NLF coordinates use of the concept models (FRBR, FRAD and FRSAD) and the international cataloguing principals in Finnish libraries.

RDA implementation in Finland

The Finnish language translation of RDA has been published on RDA Toolkit in the end of the year 2015. The translation was an important step in the implementation of RDA as a new cataloguing standard in Finland. The National Library of Finland is committed to updating and maintaining Finnish RDA so that it is current with the changes to the original (English language) RDA text. The Finnish policy statements and guidelines will be published in the RDA Toolkit in 2016.

The National Library of Finland together with the National Description Standards Development Group recommends RDA to all libraries in Finland

The National Library of Finland and several other Finnish libraries, all the libraries which are participating in the Melinda data repository (Melinda is a data repository currently containing the Finnish national bibliography as well as metadata about the resources in university libraries, polytechnic libraries, the Library of Parliament, the National Repository Library and the Library of Statistics. Also metadata from several public libraries databases is included) have implemented RDA at the beginning of 2016. RDA has replaced ISBD and the instructions for access points. For the present RDA is applied in the MARC21 format and in the present information systems. Also Finnish archives and museums use RDA when describing the agents (person, family and corporate body).

RDA is implemented in order to

- develop the functionality of information searches
- improve the efficiency of the cataloguing process
- support the conversion of library metadata into linked data
- advance the change in data models and information systems.

Co-operation in RDA development

Several national working groups of libraries contribute actively to the implementation of RDA in Finland. The networks of the library, archive and museum sectors are working together to harmonize metadata from agents in order to establish a shared national name authority service in the future.

NLF is a member of EURIG (the European RDA Interest Group) and some RSC working groups.

Tuula Haapamäki

Senior advisor

The National Library of Finland

France

Update on the bibliographic transition in France

Reminder: the French position on RDA

In November 2014, the National Library of France (Bibliothèque nationale de France, BnF) and the Bibliographic Agency for Higher Education (Agence bibliographique de l'enseignement supérieur, ABES) – the two national bibliographic agencies respectively mandated to cover the metadata standardization needs and policies of both public and research libraries – jointly expressed the French position on RDA, defining the pivotal points of the Bibliographic Transition Program. Their roadmap reads as follows:

- 1 - FRBRising French catalogs using automatic data processing as well as the technologies and standards of the semantic web.
- 2 - Deriving new cataloguing rules from RDA in RDA-FR: *A French Transposition of RDA*, which might prefigure a French application profile of RDA. The new French rules are based on RDA, but also on international standards, such as ISBD for the bibliographic description of manifestations, and the FRBR and FRAD models and other related documentation for the other entities. These new rules are being gradually implemented since 2015.
- 3- Launching a national Bibliographic Transition Program, which aims at supporting all stakeholders in France through the drastic changes induced by such a major normative and technological evolution.

The national Bibliographic Transition Program has a new Website: <http://www.transitionbibliographique.fr/enjeux/bibliographic-transition-in-france/>

First new cataloguing rules published

The first new cataloguing rules of the code “RDA-FR : a French Transposition of RDA” have been published in 2015. They are related to the section 1 of RDA. So far have been published:

1- General guidelines on recording attributes on manifestations and items

1.7 : Transcription

1.8 : Numbers expressed as numerals or as words

1.9 : Dates

2- Identifying manifestations and items

2.1: Basis on identification for the resource

2.2 : Sources of information

2.8 : Publication statement

3- Describing carriers and contents

3.2 : Media type

3.51 : Content type [new paragraph not included in RDA]

=> *The French analysis- as ISBD- considers that the content of a manifestation shall be described at the manifestation level. If a given manifestation is an aggregate of several contents, as it often happens, we have to describe content at the manifestation level, so as to make a distinction for each expression contained within the manifestation. We follow this scheme:*

F3 Manifestation

Alexis ou Le traité du vain combat / Marguerite

Yourcenar ; [burin de Salvador Dalí]. – Paris : les

Cent une, 1971. – 155 p. : illustration ; 37 cm

Type de contenu : Texte + Image fixe

Expression

Alexis ou Le traité du vain combat /

Marguerite Yourcenar

Forme l'Expression : Texte

Date de l'Expression : 1952

Les Cent une (Paris)
Expression
Illustration pour : Alexis... / Salvador
Dali
Forme de l'Expression : Image fixe
Date de l'Expression : 1971
Dali, Salvador, 1904-1989
realises
Work
Alexis ou Le traité du vain combat
/ Marguerite Yourcenar

Work
Illustration pour : Alexis... /
Salvador Dali
Yourcenar, Marguerite, 1903-1987
realises
has expression manifested has expression manifested
has publisher
has creator (author) has creator (artist)

4- Providing acquisition and access information

4.3 – Contact information

These new cataloguing rules have been published (in French) here: http://www.transitionbibliographique.fr/wp-content/uploads/2016/01/RDA-FR_Section1.pdf

Provisional calendar for 2016

We have planned to publish the following rules in 2016:

- 2.7 : Production statement
- 2.9 : Distribution statement
- 2.10 : Manufacture statement
- 2.11 : Copyright date
- 3.3 : Carrier type
- 3.4 : Extent
- 3.19 : Digital File Characteristic
- 3.20 : Equipment or System Requirement

Section 2 : General guidelines on recording attributes of works and expressions

These guidelines are not limited to RDA Chapter 5, but cover the three chapters of RDA Section 2, including the construction of access points to represent works and expressions, for all kind of resources. They will be completed by chapters focusing on each particular type of resource (music, graphic, etc.)

For this part, the organization of the rules of RDA-FR differs from RDA.

- 8 : General guidelines on recording attributes of persons, families and corporate bodies
- 9 : Identifying persons
- 10 : Identifying families
- 17 : General guidelines on recording primary relationships

Workshops on cataloguing by applying RDA

We have organized an internal BnF workshop on the experiencing tool RIMMF (so called “Sandathon” : cataloguing works by George Sand in RDA). On May, 4th, will be held a national workshop with RIMMF on Jules Verne’s works, so called “Verne-athon”).

Trainings

From 2012 onwards, trainings are regularly held in order to present challenges of the bibliographic transition to the French library community. Another training campaign has been organized last year as so to train cataloguers on new cataloguing rules of the code « RDA-FR ». This training program will be developed as new rules will be published.

The slides of the training sessions are available on the Website <http://www.transitionbibliographique.fr> (in French). We plan to publish here practical exercises with corrections.

Cooperation

BnF and ABES are members of EURIG and take part in the EURIG and RSC working groups (i. e. EURIG

WG on the Expression entity, RSC Aggregates WG and the RDA/ONIX framework WG).

Germany

Office for Library Standards 18th April 2016

RDA in the German-speaking countries

Status of the RDA implementation project in Germany, Austria and German-speaking Switzerland

Introduction

The first step of the implementation of RDA in the German-speaking library community was terminated with the beginning of the year 2016. All partners in the project have started with cataloguing according to RDA. A multitude of comprehensive trainings were conducted during the months before in order to prepare the staff in the participating libraries for the switch. The start of the practical work was managed without major difficulties.

The first RDA record in the Deutsche Nationalbibliothek (DNB) was created on October 1, 2015.

As of April 6, 2016, **72.225 bibliographic records** were created according to RDA.

For authority data, RDA had already been implemented in 2014.

Since July 2014, 500.562 authority records have been created according to RDA.

Persons 363.259

Corporate bodies 53.964

Conferences 23.833

Works 13.837

Place names 9.442

The main objectives for 2016 will be the work on topics which could not be solved in between the project duration (e.g. the description of hierarchies) and to develop procedures in order to contribute continually to the standardization work regarding RDA.

Trainings

From September 2015 until the end of the year a big part of the library community in Austria, Germany and German-speaking Switzerland went to school. Basis of the trainings were modularized materials which had been finalized in a cooperative process by all project partners and distributed in a public wiki space <https://wiki.dnb.de/display/RDAINFO/Schulungen>. Before the start of the general trainings all institutions had to qualify RDA trainers. In the DNB 35 colleagues started in summer 2015 to work with the training materials, prepared teaching sessions and got additional didactical and methodical support.

The trainings were considered to be a success. All participants received a certificate indicating which of the modules they completed. Training materials will be updated on a regular basis, to incorporate changes in RDA and experiences of the training sessions. DNB also prepared a condensed version of the training materials, especially to support self-study.

All materials can be found here:

<https://wiki.dnb.de/display/RDAINFO/Schulungsunterlagen+der+AG+RDA>

Also, for sessions during the annual meeting of the German library associations in Leipzig in March 2016 DNB has finalized a 4 hours version of RDA training, „RDA mini“, and provided two training sessions with it. This small version of the RDA training materials is suitable for small libraries, institutions with staff not especially qualified for cataloguing tasks.

Cataloguing policies and further steps

Some tasks in the RDA implementation project had to be deferred, e.g. a decision on a policy concerning the description of hierarchies. In December 2015 the German Committee for Library Standards mandated the project groups to continue the work until the end of 2016.

A main topic for 2016 will also be the decision on how to organize future workflows for decision making in terms of cataloguing policies after the termination of the implementation project. It also has to be assured that the German-speaking library community continuously contributes to the update process of RDA itself.

Most of the policy statements for the German-speaking countries (D-A-CH) have been finalized during the RDA implementation project and are accessible in the RDA Toolkit. The experiences in current cataloguing practice will be analyzed continuously, eventually resulting in a revision of

policy statements. The D-A-CH policy statements were translated into French, a translation into Italian is underway.

In general there is a great demand for practical support after the trainings. DNB has started to provide assistance in workshops and further events as well as online support via the wiki spaces. During the RDA implementation project the German-speaking library community had a focus on special and rare materials, objects and archival materials and tried to start cooperation with archives and museums. Joint working groups have been established dealing with the alignment of specific cataloguing guidelines for old/rare books, manuscripts etc. and RDA. The goal of the alignments is achieve interoperability with RDA, avoid contradictions with RDA and have joint rules for creating access points and authority data.

Cooperation and outreach□

The RDA governance review is of great importance for the German-speaking library community as well as for the European community as a whole. Currently, EURIG as an interest group has to develop a complete new organizational structure and new working processes. This request will be a main topic for the annual meeting of EURIG in May in Riga. For the transition period 2016 to 2018 the DNB will take up the role of the European representative.

As in the years before, the DNB represented the German-speaking community in the JSC/RSC Meeting in November 2015 in Edinburgh. Furthermore colleagues from Germany, Austria and Switzerland are represented in the RSC working groups.

The next RSC Meeting will be held in November 2016 in Frankfurt at the DNB. Connected with the RSC meeting will be a satellite meeting, also a XXX-athon is planned.

Information concerning RDA and the implementation in the German-speaking countries is published in the RDA-Info-Wiki (<https://wiki.dnb.de/display/RDAINFO/RDA-Info>), in mailing lists and social media. Talks and presentations are regularly given in national and international conferences and meetings.

Italy

Report on cataloguing in Italy for the IFLA Cataloguing section SC 2016 midterm meeting

Cataloguing rules

Coordinated by the central institute for the library catalogue (ICCU), the REICAT Commission has been re-established on 28 October 2015, and is focusing its activity on three points:

- revision and update the text of the Italian cataloguing rules (published in 2009);
- an hypothesis of a shortened set of rules - mainly for didactic purposes;
- an analysis of existing standards and codes, in order to consider the main new features, with

the aim at harmonising the new edition of REICAT.

There is no intention to adopt RDA, but the Italian translation of RDA has been published in pdf format, www.iccu.sbn.it/opencms/export/sites/iccu/documenti/2015/RDA_Traduzione_ICCU_5_ovembre_REV.pdf and in the RDA Toolkit.

All cataloguing rules (REICAT and cataloguing rules in the national catalogue SBN for modern, older and special resources), application guidelines and controlled vocabularies will be published in a new online platform, so to co-ordinate the different texts.

National Library Service (SBN)

SBN's 30th anniversary was celebrated on April 1st with a conference, where the evolution from a simple co-operative catalogue to a complete service offered by the libraries has been highlighted.

At the end of 2015, the catalogue of the National Sound Archives (ICBSA) has been migrated in SBN, adding more than 1.8 million records of published and unpublished sound recordings to the catalogue.

This has implied an evolution in the catalogue, in order to import all specific data; further improvements has been the adoption of ISBD area 0, and it is planned to adopt the new UNIMARC fields for Work and Expression, and a new field for RDA Carrier type.

Digitisation

Connected with the migration of the catalogue, ICBSA has linked to its records more than 275.000 digitised sound tracks, together with images of the booklets and covers. This raises to about 690.000 the number of links to digitised resources in the SBN OPAC, opac.sbn.iccu.

A project has started, to publish SBN as Linked Open data, with a new platform and a semantic web application.

International activities

The description in REICAT being based on the ISBD, and the cataloguing format on UNIMARC, Italy is following both the ISBD revision (and concerned that IFLA would decide to dismiss it or make it more principle-based) and the development of the cataloguing format. A new idea is to publish vocabularies in RDF form, so to enable their use as controlled terms in coded fields.

ICCU takes part to various international projects, such as The European Library (TEL), Europeana and World Digital Library, www.wdl.org. ATHENA Plus, www.athenaplus.eu, co-ordinated by ICCU, has contributed to Europeana with 3.5 million records, and developed applications and descriptive standards for virtual exhibitions on the cultural heritage; Europeana sounds, www.europeanasounds.eu; Italy is an active partner of 44 digitised soundtracks from cylinders, lacquer discs and CDs are now accessible through the portal, and it is planned to reach the number of 83.000.

Respectfully submitted
Massimo Gentili-Tedeschi
Paris, 29 April 2016

Norway

Report on cataloguing activities - Norway

Cataloguing rules:

Norwegian libraries currently use the Anglo American Cataloguing Rules (AACR2) as the cataloguing code. AACR2 has been translated and continuously updated into Norwegian from 1983 and to the point where it was replaced by RDA.

In 2014 the National Library of Norway made a decision to move to RDA based on the recommendations from the Norwegian Cataloguing Committee. The National Library recently signed a contract for a full translation of RDA into Norwegian. We estimate that the translation will take 9 months and foresee switching to RDA in 2017/2018.

The Norwegian Cataloguing Committee has already translated most of the glossary in order to secure a consistent and correct terminology. A professional translator has been hired to do the remaining translation work, but the National Library/Norwegian Cataloguing Committee will monitor the work and provide examples, policy decisions and guidelines. Oslo and Akershus University College, which offers studies in library and information science, will be asked to do most of the initial RDA training.

The consortium of the academic, national and university libraries (BIBSYS) switched to Alma (Ex Libris) as an ILS in November 2014 and the member libraries are currently importing and reusing RDA-records, thus creating a hybrid catalogue.

Norway is a member of EURIG (the European RDA Interest Group).

Exchange format:

The national format NORMARC¹¹ was developed in 1971 based on USMARC. The format has been updated and adjusted to fit national practices and to a certain extent to MARC 21. NORMARC is currently maintained by the National Library/Cataloguing Committee.

As a result of the switch to Alma, the BIBSYS consortium has shifted to MARC 21. Public and school libraries still use NORMARC. NORMARC will therefore be maintained in the foreseeable future.

National infrastructure:

In 2015 the Ministry of Culture published the report *National strategy for libraries 2015-2018 : The central government's tasks and responsibilities regarding the development of the public libraries*. In this report the National Library was asked to provide all public and school libraries with free metadata: "The National Library will enable public and school libraries to have free, fast, machine-readable access to bibliographic data from a central source. Data will also be available as linked open data. This will ensure good data that is the same in all the libraries¹²." Consequently from 2016, metadata is in fact a common good in Norway.

End users:

¹¹ <http://www.nb.no/Bibliotekutvikling/Kunnskapsorganisering/Den-norske-katalogkomite/NORMARC>

¹² <http://www.nb.no/content/download/74393/513989/file/Strategy-EnglishVersion.pdf>

Several larger public libraries have decided to look into the possibility of leaving their stand-alone OPACs and join forces with other libraries in their region to develop shared catalogues.

Oslo Public Library is experimenting with RDF linked data cataloguing.¹³

In 2015/2016 some of the university libraries, the National Library and BIBSYS have conducted a project to look into the possibility of moving the BIBSYS bibliographic database in the directions of linked data. The project will continue as the results are quite promising.

Authority file for works:

As a direct result of the project mentioned above, the National Library has decided to start developing an authority file for works. A working group has been formed and the members are currently studying the FRBROO model. The method for populating the file will probably be a semi-automatic approach where some data is harvested automatically and reviewed and some entered manually, probably through crowd sourcing with trusted partners.

¹³ <http://digital.deichman.no/blog/2014/07/06/rdf-linked-data-cataloguing-at-oslo-public-library/>

USA

Library of Congress Status Report to ISBD Review Group
Mid-Term Meeting, 29 April 2016

Production

In the US federal government fiscal year from Oct. 1, 2014, through Sept. 30, 2015, the Library of Congress (LOC) completed 271,977 bibliographic records for all collection formats. For the six months from Oct. 1, 2015, through March 31, 2016, the LOC Acquisitions and Bibliographic Access Directorate completed 98,179 bibliographic records, all for books, e-books, serials, or Internet sites. (Production statistics for other collection formats will not be available until October 2016.)

All bibliographic records in 2015 and 2016 are completed in RDA except those for archival materials and moving images, which continue to follow specialized instructions—DACS: Describing Archives: A Content Standard; and AMIM: Archival Moving Image Materials. All authority work is completed according to RDA.

New Staff

The Library of Congress is fortunate in being able to hire new staff in 2016. We have permission to hire 18 new librarians and 11 new library technicians. We hope to have all the new staff on board by the end of the year. This will be a welcome enhancement of our processing staff, which stood at 609 employees in October 2008 and has decreased to 419 at the end of March 2016.

Training

The Library of Congress has made all its RDA training materials available free of charge on its Catalogers Learning Workshop website, URL

<http://www.loc.gov/catworkshop/RDA%20training%20materials/index.html>

The Library plans to hire two new instructors in 2016.

Converting Existing Authority Data to RDA

The Library of Congress and the Program for Cooperative Cataloging (PCC) are working together to convert all records in the LC/NACO Name Authority File to conform to RDA. The PCC Task Group on AACR2 & RDA Acceptable Heading Categories analyzed the various conditions that would require changes to authority records as a result of implementing RDA. The resulting work has proceeded in three stages. The changes that were made in August 2012, called “Phase 1”, updated 436,943 authority records by the addition of a note, **“THIS 1XX FIELD CANNOT BE USED UNDER RDA UNTIL THIS RECORD HAS BEEN REVIEWED AND/OR UPDATED.”** This note signaled to catalogers that the access point would likely need to be changed to conform to RDA.

The changes that were made in March 2013, called “Phase 2”, changed 371,942 name authority records, applying programmatic changes to authorized access fields and cross reference fields of authority records to make them conform to RDA—for example, all instances of “Dept.” were converted to “Department.” The same changes were applied to headings in bibliographic records in the Library of Congress Catalog (using a program created by Gary Strawn, Northwestern University, Evanston, Illinois, near Chicago) from April to June 2013, with 668,748 bibliographic records updated and redistributed to subscribers to the Library of Congress’s cataloging data.

In addition, more than 1,500 headings that are included in the Library of Congress Subject Headings but established in the Name Authority File were made compatible with RDA.

For Phases 1 and 2, the LOC Cataloging Distribution Service redistributed the updated records in batches of 30,000 records at a time, to give the bibliographic utilities and other LOC MARC Distribution Service subscribers time to load the updates into their systems without service interruptions. The bibliographic record updates ran from April through June, 2013.

In early calendar year 2014, the PCC determined that it would be desirable to code all name authority records explicitly for RDA. The PCC RDA Authorities Phase 3 Task Group began work in March 2014 to consider RDA-related changes to the LC/NACO Name Authority File, beyond those that were accomplished in 2012 and 2013. The task group determined that the project should be implemented in two stages. The first stage, "Phase 3A", was conducted in December 2014 and January 2015 and made about 350,000 changes that affected authorized access points on authority records; changes to associated bibliographic records were made later in 2015.

In the next stage, "Phase 3B", more than 7.5 million name authority records will be recoded to RDA. The Phase 3B changes are to be implemented in 2016, depending on the availability of resources in the Library of Congress information technology units and from its primary integrated library system vendor, Ex Libris. *This phase will also include the addition of ISNI data, where available, to LC-NAF name authority records.* Due to the large number of authority records to be changed in Phase 3B, the recoding will be done programmatically in one "slam" process, to avoid the redistribution limitations that were a factor in Phases 1, 2, and 3A. The Phase 3B software has been developed, fine-tuned, and tested, and the Library is awaiting notice from its ILS vendor about dates when the full test run and, following thereafter, the full production run can be scheduled. Testing by the Library's Cataloging Distribution Service must also be completed before the production process can begin. The Library of Congress will announce the start date at least four weeks before the Phase 3B changes begin to be made, via an announcement from the LC Cataloging Distribution Service and messages to the appropriate electronic discussion lists.

BIBFRAME

On April 21, 2016, the Library of Congress published BIBFRAME vocabulary 2.0, which had been under development since 2014, at URL <https://www.loc.gov/bibframe/>. This has been a major process as we have tried to take into consideration a number of sources of comment on the BIBFRAME 1.0 vocabulary: the many community comments over the last 2 years on the BIBFRAME listserv, advice from invited experts, issues resulting from our own pilot with the 1.0 vocabulary, and comments received on GitHub where conversion programs for MARC to BIBFRAME were posted. We appreciate all those who took the time to review and experiment and comment on the BIBFRAME 1.0 vocabulary.

As part of converting BIBFRAME to vocabulary 2.0, LOC made revisions to the BIBFRAME web site. Documents that do not pertain to 2.0 were archived or marked as 1.0 on the site and those that are new or continue to pertain were created and posted or revised, respectively. The BIBFRAME 2.0 proposals that were published for comment last year have been revised per comments and turned into "specs" for 2.0 <https://www.loc.gov/bibframe/docs/index.html>. They are useful to answer questions about the vocabulary that a straight reading will bring up. Also the papers on RDF Conventions <https://www.loc.gov/bibframe/docs/bibframe2-rdf-conventions.html> and on Guidelines <https://www.loc.gov/bibframe/docs/bibframe2-rdf-conventions.html> for expressing data in RDF are important for understanding the properties and classes incorporated in the vocabulary. The Library of Congress is moving forward toward revising tools and conversions for 2.0 with the prospect of experimenting with it in a new pilot late in calendar 2016. We welcome comments at bfcomments@loc.gov or on the BIBFRAME electronic discussion list (listserv).