>> Kathy Glennan: Thank you. Can you hear me? My name is Kathy Glennan. I'm head of original and special collections cataloging at the University of Maryland Libraries and I'm also the representative to the RDA steering committee which will be referred to in this presentation as the RSC.

I wanted to start out with a little bit of background about what we are, what we're doing and how we got here. So the important thing to remember is that RDA is governed by a board that gives the RSC its marching orders and the board has set the following vision for RDA as being the global standard enabling discovery of content. As many vision statements are. This is a very big, broad, forward_looking thing, and it is governing what is happening with RDA development, specifically what's going to come up today in my presentation are those first two strategic priorities on this slide to make RDA an internationally recognized standard and to increase the adoption of RDA internationally.

So part of that effort is the RDA toolkit 3R Project, or RDA toolkit restructure and redesign project, which is underway right now. The effort is to redesign the toolkit from a cataloger perspective to interview the user interface, create greater flexibility in display and change the instruction numbering, unfortunately for those of us who have come to know and love the numbering. The vision that we have for the flexibility and everything else requires restructuring the instructions. But the customization will allow some of us who right now have to look in multiple windows to get everything we want, the instructions themselves, the policy statements we're following, we will be able to have all of that display in context in one screen.

The other thing that will be happening is restructuring. That includes the instruction numbering changes, along with simplifying the instructions and generalizing them wherever we can to more clearly group instructions by entity, and to add and remove content that is happening outside of the RDA context, but under the underlying models. So there are place holder instructions in RDA right now that were there saying this content will be developed once the functional requirement's models give you this information about place or something else like that.

Unfortunately the model never developed that way, and those placeholder chapters have been sitting there for years. We're going to remove those. At the same time, the underlying model, the IFLA Library Reference Model, which replaces the functional requirements models, is also changing, and there are new entities that are not represented in RDA right now, so we need to add those.

And of course more relevant to this particular presentation is the implementation of the 4_fold path. So all of this is going to be revealed by April of next year.

What got us here anyway? Well, RDA is structured based on an AACR_2. That was its initials foundations, but it's also formed by other things, including the statement of international cataloging principles, which was updated recently, and IFLA's functional requirements models FRBR, FRAD and FRSAD, and as I mentioned in the previous model, the successor, IFLA library reference model which consolidates all of the previous function requirements models into a single coherent model. RDA's

future is back to the vision statement to include more communities, to include international communities way outside of the Anglo_American context, to incorporate cultural heritage communities and to reach out and link data to communities.   The constraints, though, are that our records and data, whatever we generate from RDA now still have to work in our current environment, and for most of us, that's a mark 21 cataloging environment.   However, the future is longer than the past, and we can't make decisions about RDA's future based on a mark 21 mindset.

All in all, what happens with all of this is that with RDA's future, we are no longer just going to have an Anglo_American library centered focus to the cataloging guidelines.   So who's working on all of this, anyway?   Well, the RDA steering committee is a major player, they're ten members.   Also the RSC working group chairs have been invited to participate, and that's up to ten members.   We have working groups on various topics where we need specialization, such as places or music.   We have hired a 3R project consultant to help keep us on track.   Also, James Hennely is the director of ALA Digital Reference and the publisher of the RDA toolkit is obviously involved as part of the overall end_user experience of the toolkit and other volunteers will be working on this process.   The working group chairs will invite the working group members to participate, and regional communities, such as the ALCTS committee on cataloging description and access will also participate in the case the CCDA, we've recently appointed a task force to help me review documents and determine what the ALA position is when we have these discussions.

So this 4_fold path thing, what is it, anyway?   Well, it's four ways to capture information about something in the bibliographic universe.   Some of the paths only apply to certain entities.   Three of these paths are already represented in RDA in certain ways, but they're not done so consistently.   So if you look in the right places, you can find information about unstructured description, structured descriptions and identifiers.   The fourth path is hinted at in RDA right now, and that's the uniform resource identifier for the entity.   Because we're looking at link data applications, this is going to take greater and greater importance to.   This is the only way we can bring in the link data community.   Implementing all four paths throughout RDA will offer greater flexibility in capturing the data but it will also offer greater flexibility in applying the instructions and there will need to be underlying guidelines from different communities about what to do when.

All of this is part of fulfilling the LRM user tasks, which are built on the FRBR user tasks to find, identify, search and obtain, and also explore was added.   What's important here is that we are looking to serve the end user and how that end user wants to find and relate information.   So finding, identifying, making sure that you can distinguish between one resource and another, obtaining is obviously critical. Our cataloging records can be wonderful, but if the end user cannot figure out how to get to that resource, it's not very helpful.   And explore, then, underlies one of the growth areas with LRM, which is relating resources to each other to branch out and discover more information.

So as I mentioned, the 4_fold path is in RDA right now, and here are some examples from the current RDA tool kit.   In chapter 27, there are groups of examples, and here's what you see.   This is the first example in each of the three categories.   The first, unstructured description of the related manifestation is actually just a free_form textual note.   Structured description of the related manifestation in this case is a structured note about a reprint using ISBD punctuation and everything in a very predictable form if you know ISBD.

The third one is the identifier for the related manifestation and we can see that ISBN is actually an identifier.   And in chapter 17, you have to look for this one.   It's an identifier for the manifestation that is an actionable URL.

So this leads to this 4_fold path diagram, where the top two things are descriptions and the bottom two things are identifiers.   Unstructured description includes a lot of things, like transcription or modified transcription, which is really what cot loggers do most of the time.   We'll do more of that in a minute. Other things that I might want to put in a record just so other catalogers know what I did.   The best way to get at unstructured description information in our catalogs right now is through keyword indexing.   We do this for titles, contents, notes, sometimes other things, too, statements of responsibility, addition statements.   If we decide to keyword index it, even if it's an unstructured description, it can be retrieved.   For structured descriptions, these include things that __ pieces of data that we put together in a particular sequence.   So if you think about a traditional publication statement, or a thesis information, where we identify the degree, the year, the institution, but other structured descriptions are actually access points, like personal names, personal name followed by dates or a title or some combination thereof, work access points.   We're also putting elements together to identify a work in a structured way.   The other two, these identifiers, the unactionable identifier includes things like ISBN, ISSNs.   These are assigned by an agency, and they follow a particular pattern. However, they don't really have meaning unless you associate them with the assigning agency. Otherwise, it's just some sort of number or other character string that doesn't have a lot of meaning. They are __ they should be unique within that agency.   But they may duplicate something, some other kind of identifier assigned by some other agency.   An actionable link, however, should be globally unique, and it includes URIs and IRIs, international resource identifiers.   This is the link data piece and this is what allows our data to communicate with data and make linkages with data assigned by people completely outside of libraries, if that's the right place to go.   Each implementation scenario is supported by these paths.   RDA was envisioned as being able to exist in a number of different implementation scenarios, anything running from a flat file such as a card cataloged through linked access points between bibliographic like we have right now, also in relational or auto databases, and now link data which is fully linked at the global level.   So each one of these paths can be used, or at least parts of them can be used to make sense in these different implementation scenarios.   So before I go any further into cataloging jargon and hopefully if I do I don't lose you, I'd like to know who's in the audience today so if we could put up the poll, that would be very helpful.   I'd like to know who's here

and check everything that applies, because I was, in fact, told that I would have a mixed audience, so I'm glad to see that there are a few of you there who are not cataloging geeks like myself.

Let's take a look at these a little bit closer.   What are these paths and what are some examples of them?   Well, unstructured description includes all notes of all kinds, quotes from various sources, transcribed statements from the manifestation.   This is the only path that includes transcription or what you see is what you get, and usually when you talk about wiziwig, it's something that's mechanically captured.   You could actually take a picture of a title page and say there it is.   It's transcribed.   Or you could employ staff to simply transcribe exactly what they see.   Be very simple kind of assignment.   You wouldn't have to apply all sorts of exceptions.

However, when catalogers get their hands on cataloging manifestations, we tend to manipulate our unstructured descriptions, especially transcription, with following particular rules or conventions.   And this includes changing capitalization or adding punctuation for clarity, maybe substituting text for symbols that can't be reproduced and letting typography influence what we think is really prominent in what we think maybe the title is or what order things go in.   So we have modified transcriptions.   And we can close the poll, please.   In both of these cases, I would transcribe these with some changes. But the Maya Angelou book, I would have fewer changes, I would probably transcribe the title and probably random house in New York, I wouldn't transcribe in all caps.   However, the Animal Planet title here on the other side, this one is a little more complex and let me show you what my cataloging institution did with this particular title.

So we had details that were just a little bit different.   You can see in the title, we decided to add punctuation between all those adjectives to help it be a little bit clearer, and we also changed the capitalization so it didn't seem like it was screaming at you.   We also decided that Animal Planet was not part of the title.   Now, this is an interesting decision because catalogers apply their wealth of knowledge and experience and we say, oh, that's some sort of publisher or something else and it's just up there at the top.   It is important, however, to capture this in the record, because I can tell you when I looked at this title on Amazon, the title began with "Animal Planet," so just because catalogers have a refined view of what we think the title is, somebody looking at this book who's not trained as a cataloger may have a very different decision so it's important to provide access both ways.

And we have another problem.   What do we do when we end up with a special symbol and a title that maybe we can't reproduce?   Certainly if we can use the symbol as it is, that's probably the best, then people don't have to guess what's going on, but maybe we need to replace it with one or more terms if that's not in our character set.   So is this squiggly thing a section sign?   And actually in my library's cataloging, it's called a paragraph symbol, but as my parenthetical on this slide indicates, that's not what I think of when I hear that phrase.   Our choices then are based on the availability in the character set, and if maybe you have to substitute something, the term used for the symbol, in your language, maybe in the language of the resource.   Would it be more appropriate to put this particular symbol in German

because this is a German title.   Or maybe my user base, maybe my language is not the same as my user's base.

Another option would be to simply use the mark of omission for the section symbol and simply leave it out of the transcription.   In any case, in any of these scenarios where you don't use the actual symbol as it appears on the title page, a note should be made so that your users know what happened.

So what about non_Roman transcription?   Well, technically, only transcribing in the vernacular is description.   If you Romanize the title, you're applying rules about this particular character translates into these Roman characters, and I know what the spacing rules are, and then I end up with a Romanized title.   It's not that it's not important.   In fact, it probably is important in various settings, but it's not technically transcription.   Only transcribing the Japanese here would be the technical definition of transcription.

And then we have problems like this.   Where on earth does the title start?   This is a fairly common approach for Schirmer's publications, where they give the composer and the very first title that you see is Op 6.   This is not what musicians, music catalogers think is the title.   In fact, we would likely be choosing between introduction and variations on the Russian air or maybe even based on typography, the Red Sarafan.   So what should we do?   Well, catalogers will likely pick introduction as the first word of the title, but again I looked at this on Amazon and they thought the title was Opus 6.   So this is one of those places where we arrange things on the title page as part of, quote unquote, transcription to make it make more sense.

So what about structured description?   Well, we can use transcribed data to create a structured description, such as publication statements, which have a take what you see approach to each element, but then combine them in a particular order.   And you're all familiar with this kind of thing, place, publisher and date.

We could also use recorded data.   Recorded data imposes standardization in what's captured, so we would exclude a typo.   And we might take things from a closed list, like the content type or as I was describing earlier, we would create a work access point by combining authorized versions or recorded versions of the creator's name, if that's relevant, the preferred title, and if that doesn't create a unique string, then other information needed to disambiguate that string.   It's important to note that as RDA goes more international, some cataloging communities may use different structured forms of the data and that we need to make sure that RDA can be applied outside of the Anglo_American context.

So I've lumped the other two here, identifiers can either be recorded or actionable __ well, sorry.   They can all be recorded.   They're all recorded.   They can either be actionable or not actionable.   The typical assignment of identifiers in this context are assigned by and unique to a particular agency as I mentioned before, but many catalogers are familiar with this situation as the same ISBN is assigned more than one work.   We hate that, but it happens.   And as I mentioned earlier, we need to associate

the identifier with the agency for that identifier to have meaning.   If you're in the "In" crowd, the structure and prefixes may carry meaning.   If certainly some of us know that particular characters that start an ISBN, identifying the publisher or in my world of music catalog:I can sometimes look at a music publisher or maker and identify the pub jellyfisher.   It can give me an idea of sequence and that can actually have importance in dating resources sometimes.   This particular thing, which I know when it was published was published before this other thing because of the sequence of these numbers.

For actionable links, these are designed exclusively for the link data environment.   These are identifiers designed for machines for global use and most certainly have strings that humans cannot easily interpret.   I've included an example here on this slide from the RDA registry which, unless you look it up or unless you helped design it, p 20219 does not mean anything to me until I find out that it's about duration.

So let's take a little closer look at place names.   When to transcribe, when to record.   This particular title in my library is about politics in communities in Bombay City.   Now, that was the name of that place at the time that this book is written about, so there's some character string choices I could use to identify this.   And certainly if I catalog this before 1995, I would have used Bombay, India as the authorized access point to represent this content.   Certainly in an unstructured description, I'm going to describe Bombay city.   It's what's on the title page, how the resource describes itself.   That's going to be there.

But for Bombay, India, that __ using that form is no longer practiced in the Anglo_American community. We use Mumbai, India, which is the official form.   So that is our structured description in an authorized access point for the subject, but note that this relies on a character string for unique identification. Different communities might pick many other variants.   Some of these are actual previous names for Mumbai at various points in time.   You can see there's different scripts you might use, different Romanizations based on language.   There's so many choices.   So again, cataloging agencies may make different decisions.

In terms of identifying this place, we could get some things that are more language_neutral and more flexible across cataloging communities, from a non_actionable standpoint, that could be the geographic coordinates, or an identifier for the authority file or the source of geographic names.   These are language neutral.   But unless we make them into URIs or IRIs, they're not actionable.   If we have the geo names, IRIs, then we can link that to other descriptions that use the same IRI and bring together more information about Mumbai to our users.

Same problems come up in capturing a personal name.   What on earth, which version do I pick for Alexander Solzhenitsyn?   These are all from statements of responsibility in my catalog.   So an unstructured description, I'm going to describe this as a statement of responsibility.   And a structured description, I'm going to choose one form for the authorized access point and use it consistently. That's, in fact, how I found all of these particular examples.   As an identifier, I could find the ISNI,

international standard name identifier.   But it's only actionable if I make it the URI for the name.   And either one of those is true, and all of these describe Alexander Solzhenitsyn.   You also don't have to pick just one of these.   As pretty obvious in this case, Solzhenitsyn, as a statement of responsibility, transcribed from the manifestation is going to be different than the access point I provide for this particular title.

So let's take a look at another problem.   Agatha Christie's "Remember Death," or is it sparkling Cyanide.   Remembered death was first published in New York in 1945, and later it was published in London under a completely different title, which apparently it has gotten to be known better by.

So I have another audience poll for you.   Assuming a MARC record environment, which is the primary path you would use to identify this work?   And you can recognize that there may be more than one choice.   Somebody said everything.   That's always good.   In a MARC environment, why use __ we can close the poll __ an authorized access point, and also make sure I had a variant access point.   So the Library of Congress control number indicates here that the authorized access point is sparkling cyanide.   It could go either way, but in any case we want to make sure that both titles are there so our user who knows one title will find the others.   But as some of you noted, you could also __ yikes, help me here.   Share my screen.   Help.   Got into a problem with my slides.

I appreciate the help here.   Thank you.   In addition, we could have an unstructured description as a note in the bibliographic record for spark ling cyanide.   But if we move into the linked data environment, and this is a very simplified look, this is something that I put together, and again, extremely simplified.   Agatha Christie wrote sparkling cyanide.   These have different dates of publication and certainly the graph could be added for publishers and all sorts of other things.   In my work, I discovered that sparkling cyanide is based on a title called yellow Iris that Christie also wrote. It's a related work because actually the protagonist is different, but the basic plot is the same, so it's not unreasonable to think that in a linked data world, you might want to tell people that they really want to know about this and see the evolution of Christie's thinking about the story, Yellow Iris might be an interesting place to start.

So I have some things for you to think about as I wrap up, and I don't really have anything in terms of answers.   These are questions for you to think about.   If they're different formats such as what is the best path for select, for this particular title that was first issued as a VHS and then later as a DVD.   Or how are we going to identify who is responsible for the title fantastic beasts and where to find them, when this was first published, it was the statement of responsibility was Newt Scamander.   We have statements of responsibility in both cases that give differing information.   So identifying is important here.

And some questions to ponder that maybe we can get to or although I know I have a few questions here to answer at the end.   When does transcription work best?   With when it is important to record data rather than to transcribe it?   When would it make sense to use an identifier, such as an LC control

number or ISNI?   What are the benefits of using a link data URI or IRI, and when should more than one path be taken?   So I leave that to you, and I can take questions for a little bit here as we wrap up.   So I see one question, a larger question for the end of the chat, if the movement of RDA is away from library_specific and book_specific description, what is RDA designed to be used for?   Who is it designed for?   Is the answer supposed to be everything and everyone?   That's an interesting question.   I think what will happen is that the guidance that's currently in RDA is still very valuable for our community.   The question is if it's not appropriate for the international realm, where can that be moved?   So I like to think that that would be moved, say, in to an American practice, for example, that would still be documented.   It's not a good idea for us to back away from providing the guidance that all of us have been following and presumably we like to have that be a consistent thing in our catalogs moving forward.

And a less lofty question also in the chat questions regarding these restructuring, has it been decided what the over_arching structure will be?   In other words, will the 4_fold path be the new section or chapter headings?   It's challenging.   The RSC is meeting next week to start making some preliminary decisions about this, but there will definitely be guidance for all elements and the 4_fold path, and the examples that will be included in RDA will not be prescriptive because you won't have examples for everything.

And can we ever move away from the MARC format?   I hope so.   It's a challenge.   RDA is continuing to look very forward toward linked data, but at the same time, we are constrained by the reality that MARC is still what most of us have.

Anything else?   Any other questions?   If not, I'm happy to continue this discussion on the forum page.

>> Santi Thompson: I think that's absolutely right, Kathy.   That would be the best way moving forward.   So thank you so much for your presentation, and I would encourage participants to go to your forum page and continue this conversation moving forward.   But we now have to transition to our final segment for the day, which will be our wrap_up.   And to do that, I'm going to pass this over to one of the other ALCTS Exchange working group members, Erica.   And so once the slides change, Erica will take over and we'll end the day.   Thanks, everyone.

>> Erica Findley: Thank you, Santi.   We have now reached the closing of day 1 of the ALCTS Exchange. The ALCTS Exchange organizers would like to that I a moment to thank all of today's presenters for leading us through the explorations of topics such as collaborative monograph retention, librarians and social justice, the RDA 4_fold path and new and emerging roles for cataloging and metadata librarians.

We'd also like to give a very special thank you to Mimi Ito for kicking off the exchange with her thought_provoking keynote talk.   ALCTS would also like to thank our sponsors, Wiley and ExLibris. Without their generosity, the ALCTS Exchange would not be possible.

We'd also like to invite you to continue the conversation on twitter, using the #ALCTSx17 and on the ALCTS Exchange Web site where you will find a discussion forum for each session that we had today and you can continue to engage our presenters there and also interact with our surveys and group discussion guides.

And if you missed any of the presentation today, the recording of day one will be available tomorrow on the ALCTS Exchange Web site.

You can also explore our poster presentations at any time on the ALCTS Exchange Web site.   We will be closing tomorrow's session with a poster presentation discussion forum where all our poster presentation presenters will be available online.   But each poster presentation is now available to view any time on the ALCTS Exchange Web site.

We're looking forward to day 2 of the exchange on Thursday, May 11th, starting at 1 p.m. Eastern. Thursday's theme is creative problem solving.   We'll learn about building a diverse technical services learning community, processing massive gift collections, going beyond hiring and programming to manifest the values of social justice in our daily work, using a Google application for cataloging and how to do remote storage successfully.   And then, like I mentioned before, we'll close out day 2 with a lightning talk and poster presentation discussion forum.

Thank you, everyone, for attending the ALCTS Exchange.   Please be on the lookout for an evaluation that will be E_mailed to you from ALCTS.   This exchange is the first of its type, and we welcome your feedback.

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