doi:10.3359/oz1402072

članek

REACHING DECISIONS AND ADJUSTING: RDA AND OCLC

Jay Weitz

OCLC, Dublin, Ohio

E-mail address:
weitzj@oclc.org

Abstract

Resource Description and Access (RDA), the successor to the Anglo-American Cataloging Rules (AACR), has had a significant impact on both bibliographic and authority data as they are represented in Machine-Readable Cataloging records in MARC 21. A brief history of the develoment of RDA is outlined. Since 2006, OCLC has kept up with some fifteen MARC 21 Bibliographic, Authority, and Holdings Updates through a total of nine OCLC-MARC Updates. Many of the new fields and indexes implemented by OCLC are listed, many of them directly related to RDA. The MARC fields for Content Type (336), Media Type (337), and Carrier Type (338) are given special attention, as they collectively replace and improve upon the AACR concept of the General Material Designation (GMD). In addition to the many new indexes implemented, including the "Entity Attributes" indexes in both the Bibliographic and Authority files, newly defined elements have been added to many existing indexes. RDA-related updates have also been made to OCLC's Connexion browser and client interfaces. OCLC policies regarding RDA records are discussed, including some of the automated changes to existing records that are underway.

Keywords

RDA, MARC 21, OCLC, Cataloguing, AACR, Bibliographic data, Authority data

Izvleček

Katalogizacijska pravila Resource Description and Access (RDA), ki so nasledila Anglo-ameriška katalogizacijska pravila (AACR), so imela velik vpliv tako na bibliografske kot na normativne podatke, kot so prikazani v strojno berljivih kataložnih zapisih v formatu MARC21. Prikazana je kratka zgodovina razvoja RDA. Od leta 2006 je OCLC z devetimi posodobitvami formata OCLC-MARC držal korak s formatom MARC 21, v katerem je bilo izvedenih približno petnajst posodobitev, ki so se nanašale na bibliografske in normativne podatke ter podatke o zalogi. Navedenih je precej novih polj in indeksov, ki jih je uvedel OCLC; mnogi od njih so neposredno povezani z RDA. Posebna pozornost je namenjena poljem formata MARC za vrsto vsebine (336), vrsto medija (337) in vrsto nosilca (338), saj skupaj zamenjujejo in izboljšujejo koncept splošne oznake gradiva (angl. *General Material Designation, GMA*). Poleg uvedbe mnogih novih indeksov, vključno z indeksi atributov entitete (angl. *Entity Attributes),* tako v bibliografskih kot normativnih datotekah, so bili k mnogim obstoječim indeksom dodani številni na novo definirani elementi. Posodobitve, povezane z RDA, so bile izvedene tudi za OCLC-jeva vmesnika za brskalnik in odjemalec Connexion. Obravnavana je politika OCLC-ja glede RDA-zapisov skupaj z nekaterimi samodejnimi spremembami obstoječih zapisov, ki so v teku.

Ključne besede

RDA, MARC 21, OCLC, katalogizacija, AACR, bibliografski podatki, normativni podatki

Most catalogers know that for cataloging under the broad rubric of "Anglo-American Cataloging Rules" (AACR) and for content designation under the general label of "Machine-Readable Cataloging" (MARC), what has appeared to be decade after decade of stability has actually been a seriously misleading illusion. Like the proverbial duck paddling furiously underwater, beneath the apparently calm surfaces of AACR beginning in 1967 and

The article is based on the presentation with the title Reaching Decisions and Adjusting: RDA and OCLC given at the international conference UNIMARC 2014: 4th UNIMARC Users' Group Meeting in Maribor, Slovenia, on 14 May 2014.

MARC beginning in 1968 have been two parallel realms of turmoil in which standards have never been able to keep pace with the moving target of technology.

Every conscientious cataloger has been dealing with constant change for decades. Most of the resources that we catalog have evolved in some significant way in the past half century. Some of those resources have gone through several generations of technological change during that period. At the same time, both the MARC formats and the cataloging codes have been in a corresponding struggle to keep up. Regardless of whether you became a cataloger in 1964, earned your MLS in 2014, or joined the fun somewhere in between, you have stepped into a rushing river of revision that has tested your resilience, your patience, your skills, your judgment, and your imagination. Not to mention your competence and your education (Weitz, 2011).

Resource Description and Access (RDA), the successor to the Anglo-American Cataloging Rules, is merely among the more recent, thorough, controversial, and disruptive of those changes to our standards. RDA itself has lived through its own tumultuous evolution beginning with the seeds at the International Conference on the Principles and Future Development of AACR (the "Toronto Conference") in October 1997 (Weihs ed., 1998) and the publication by IFLA of *Functional Requirements for Bibliographic Records: Final Report* (FRBR) in May 1998 (IFLA Study Group on the Functional Requirements for Bibliographic Records, 1998).

The first draft of *AACR3, Part 1* (http://www.rda-jsc.org/aacr3draftpt1.html) was made available in December 2004, but the response was such that "a new approach was required" (Joint Steering Committee (JSC), 2005) and the transition to RDA was announced in April 2005. The first "Full Draft" of RDA became available in November 2008 (Joint Steering Committee (JSC), 2008). The online RDA Toolkit (http://www.rdatoolkit.org/) was published in June 2010, followed by the United States RDA Test conducted between October and December 2010. On June 13, 2011, the U.S. national libraries announced that RDA implementation would not occur before January 1, 2013. In the event, RDA "Day One" was March 31, 2013, and it appears that most catalogers have survived.

Even as many of us are still learning RDA, it remains an ever-moving target. Every cataloging community had its own substantial list of things that RDA does not address adequately or at all, or that are not dealt with in a manner that makes sense for each specific type of material. Plus, even when (or if) most or all of those problems are ironed out, RDA allows such wide latitude of practices that many communities are also drawing up their own sets of best practices.

The state of the RDA tool is relatively stable, or at least as stable as AACR ever was, but the Joint Steering Committee for Development of RDA (JSC; http://www.rda-jsc.org/), the ALA Committee on Cataloging: Description and Access (CC:DA; http://alcts.ala.org/ccdablog/), and others are still fiddling. ALA's MARBI had been adapting MARC to accommodate RDA to the extent possible; its successor organization, the MARC Advisory Committee (MAC; http://www.loc.gov/marc/mac/index.html) continues that process. The Library of Congress's Bibliographic Framework Transition Initiative (BIBFRAME; http://www.loc.gov/bibframe/) is working on "the project … to translate the MARC 21 format to a Linked Data (LD) model while retaining as much as possible the robust and beneficial aspects of the historical format." (Library of Congress, 2012) Additionally, of course, your local system vendors and other service providers such as OCLC have been busy preparing for this impending future.

Since the beginning of RDA – in fact, since before the beginning of RDA, going back to the 1997 Toronto Conference – at least nine of my OCLC colleagues and I have taken part in countless task forces, committees, invitational conferences, and other groups related to AACR2/RDA and MARC/Bibliographic Framework Transition Initiative. These include, but are hardly limited to:

- Committee on Cataloging: Description and Access (current).
- CC:DA Task Force on Consistency Across Part I of AACR2 (2002–2007).
- CC:DA Task Force on Specific Material Designations (2003–2007).
- CONSER Standard Record RDA Core Elements Task Group (final report, December 2011).
- International Conference on the Principles & Future Development of AACR (1997).
- IFLA Working Group on Functional Requirements and Numbering of Authority Records (FRANAR) and Functional Requirements for Authority Data: A Conceptual Model (FRAD, published 2009).
- Joint ALA-BL Task Force to Reconceptualize Chapter 9 (2002–2004).
- LC Working Group on the Future of Bibliographic Control (2006–2011).
- MARC Advisory Committee/MARBI (current).
- PCC Authority Source Citation Task Group (final report, October 2011).
- PCC/LC Policy & Standards Division RDA Policy Statements Task Group (final report, April 2012).
- PCC RDA Access Points for Expressions Task Group (revised final report, January 2013).

- PCC RDA Essential Elements Task Group (final report, April 2012).
- PCC RDA Relationship Designator Guidelines Task Group (final report, April 2013).
- PCC RDA Authorities Task Groups (current).
- PCC Task Group on AACR2 and RDA Acceptable Heading Categories (final report, August 2011).
- PCC Task Group on Hybrid Bibliographic Records (final report, September 2011).
- PCC Task Group on Hybrid Integrating Resource Records (final report, April 2012).
- RDA Examples Group One (2005–2010).
- RDA Examples Group Two (2006–2010).

This is not to neglect the other liaison roles that several of us fill in such cataloging constituencies as the American Association of Law Libraries (AALL), the Music Library Association (MLA), the Music OCLC Users Group (MOUG), the Online Audiovisual Catalogers (OLAC), the Map and Geospatial Information Round Table (MAGIRT), the IFLA Permanent UNIMARC Committee (PUC), the IFLA Cataloguing Section Standing Committee, and the Program for Cooperative Cataloging (PCC).

Since 2006, OCLC has kept up with some fifteen MARC 21 Bibliographic, Authority, and Holdings Updates through a total of nine OCLC-MARC Updates. The OCLC-MARC Updates since 2010, in particular, have been devoted overwhelmingly to elements defined for RDA. LC keeps an "RDA in MARC" page up-to-date at http://www.loc.gov/marc/RDAinMARC.html. OCLC Technical Bulletins can be found at http://www.oclc.org/support/documentation/technicalbulletins.en.html, although most of the appropriate material from the TBs has been incorporated into *Bibliographic Formats and Standards* (http://www.oclc.org/bibformats/en.html) and/or *Authorities: Formats and Standards* (http://www.oclc.org/support/services/worldcat/documentation/authorities/authformat.en.html).

In May and August 2014, OCLC installed the two phases of the 2014 OCLC-MARC Update, comprising the MARC 21 Bibliographic, Authority, and Holdings Updates No. 16 (April 2013), 17 (September 2013), and 18 (April 2014) (Library of Congress, 2014). Among the elements included are:

- All new MARC codes announced by the Library of Congress between April 2013 and June 2014.
- New code "l" (letter "el") defined for "Format of Music" (FMus; Music 008/20 and 006/03).
- New subfields $q (Qualifying Information) in Bibliographic (and Authority and Holdings, where applicable) fields 015, 020, 024, and 027.
- New subfields defined for Bibliographic and Authority 046 field.
- Subfields $c (Location of Meeting) made repeatable in Bibliographic and Authority X10 and X11 fields.
- New subfield $3 in Bibliographic field 250, plus making field 250 repeatable.
- New Bibliographic and Authority fields 385 (Audience Characteristics) and 386 (Creator/Contributor Characteristics).
- New First Indicators for the Bibliographic 588 field.
- New subfields $7 (Control Subfield) in Bibliographic 8XX fields.
- New Authority X62 fields for Medium of Performance Terms.
- New Authority fields 672 (Title Related to the Entity) and 673 (Title Not Related to the Entity).

Full details can be found in OCLC Technical Bulletins 263 (http://www.oclc.org/support/services/worldcat/documentation/tb/263.en.html) and 264 (http://www.oclc.org/support/services/worldcat/documentation/tb/264.en.html).

The multidimensional Content, Media, and Carrier terms and codes that in RDA replace the one-dimensional General Material Designations (GMDs) may be the most familiar of the new Bibliographic fields. OCLC implemented these in 2010.

The three fields – 336 for Content Type, 337 for Media Type, and 338 for Carrier Type – are identically structured, with subfield $a for the appropriate term, subfield $b for the corresponding code, subfield $2 for the source of the term and/or code, and subfield $3 for "Materials Specified," the part of the described materials to which the field applies. Because both the terms and the codes are supposed to be from controlled lists, they can theoretically be programmed to display (or not display) as, for example, text in any language or as some sort of icon. Different combinations of 336, 337, and 338, could be defined as a particular sort of icon or a specific term, and so on.

- 336 – Content Type (Repeatable): "The form of communication through which a work is expressed. Used in conjunction with Leader/06 (Type of Record), which indicates the general type of content of the resource. Field 336 information enables expression of more specific content types and content types from various lists." (Library of Congress, 2009a)
- 337 – Media Type (Repeatable): "Media type reflects the general type of intermediation device required to view, play, run, etc., the content of a resource. Used as an alternative to or in addition to the coded expression of Media Type in field 007/00 (Category of Material). Field 337 information enables indication of more specific media types and media types from various lists." (Library of Congress, 2009b)
- 338 – Carrier Type (Repeatable): "Carrier type reflects

the format of the storage medium and housing of a carrier in combination with the media type (which indicates the intermediation device required to view, play, run, etc., the content of a resource). Used as an alternative to or in addition to the coded expression of carrier type in field 007/01 (Specific Material Designation). Field 338 information enables indication of more specific carrier types and carrier types from various lists." (Library of Congress, 2009c)

In 2010, 2011, 2012, 2013, and 2014, new fields related to RDA elements were defined in MARC Bibliographic and in MARC Authorities. The following are not complete lists, but give you an idea. Additionally, new subfields were defined in some existing fields to cover RDA elements not previously accounted for. These are MARC elements that any entity claiming to support MARC 21 would have to implement. OCLC has tried to do much more in these past few years.

Bibliographic Fields

- 083: Additional Dewey Decimal Classification Number.
- 085: Synthesized Classification Number Components.
- 264: Production, Publication, Distribution, Manufacture, and Copyright Notice.
- 344: Sound Characteristics.
- 345: Projection Characteristics of Moving Image.
- 346: Video Characteristics.
- 347: Digital File Characteristics.
- 377: Associated Language.
- 380: Form of Work.
- 381: Other Distinguishing Characteristics of Work or Expression.
- 382: Medium of Performance.
- 383: Numeric Designation of Musical Work.
- 384: Key.
- 385: Audience Characteristics.
- 386: Creator/Contributor Characteristics.
- 883: Machine-Generated Metadata Provenance.

Authority Fields

- 046: Special Coded Dates.
- 162: Heading – Medium of Performance Term.
- 336: Content Type.
- 368: Other Attributes of Person or Corporate Body.
- 370: Associated Place.
- 371: Address.
- 372: Field of Activity.
- 373: Associated Group.
- 374: Occupation.
- 375: Gender.
- 376: Family Information.
- 377: Associated Language.
- 378: Fuller Form of Personal Name.
- 380: Form of work.
- 381: Other Distinguishing Characteristics of Work or Expression.
- 382: Medium of Performance.
- 383: Numeric Designation of Musical Work.
- 384: Key.
- 385: Audience Characteristics.
- 386: Creator/Contributor Characteristics.
- 462: See From Tracing – Medium of Performance Term.
- 562: See Also From Tracing – Medium of Performance Term.
- 672: Title Related to the Entity.
- 673: Title Not Related to the Entity.
- 762: Established Heading Linking Entry – Medium of Performance Term.

Aside from the three new 33X fields for content, media, and carrier, the field that has probably gotten the most attention has been the Bibliographic field 264: "Production, Publication, Distribution, Manufacture, and Copyright Notice." (Library of Congress, 2011) In June 2102, the document "PCC Guidelines for the 264 Field" (http://www.loc.gov/aba/pcc/documents/264-Guidelines.doc) was made available and OCLC has recommended that users follow these guidelines when creating RDA records.

Along with implementing the new fields, subfields, indicators, and codes, OCLC has created no fewer than nineteen new Bibliographic indexes and six new Authority indexes since 2008.

Bibliographic Indexes

- Access Restrictions (rs: and rs=).
- Date Created as MARC (dm:).
- Description Conventions (dx:).
- Dewey Additional index (d3:).
- Dewey Component index (d5:).
- Dewey Full index (d4:).
- Dewey General index (d6:).
- Entity Attributes (en:).
- Generation Agency index (ga=).
- Generation Process index (gp: and gp=).
- ISSN Link (ik: and ik=).
- Language of Cataloging Description (ll:).
- National Bibliography Number (nn:).
- Other Class Number (ot: and ot=).
- Physical Description (p3:).
- Provenance (pv:).
- Thesis/Dissertation Date index (dy:).
- Thesis/Dissertation Degree index (db:).
- Thesis/Dissertation Institution index (di:).

Authority Indexes

- Cartographic Data (cm:).
- Entity Attributes (en:).
- Generation Agency index (ga=).
- Generation Process index (gp: and gp=).
- ISSN Link (ik:).
- Relationship (rx:).

Clearly, not all of them are directly related to RDA, but several (including the Bibliographic "Description Conventions" index, the Authority "Relationship" index, and both "Entity Attributes" indexes) are. Generally, new Bibliographic indexes get gradually populated as records are added to WorldCat or are replaced.

The "Entity Attributes" (en:) indexes in both the Bibliographic and Authority files give access to all of the relevant new RDA-related fields (such as 34X, 37X, and 38X) and some previously-defined fields that seemed appropriate. In Authorities, especially, using this index in conjunction with, say, a proper name, could narrow down a search of common names to only those with specific attributes that could be found in one of these fields (Associated Place, Field of Activity, Occupation, etc.).

Just as important as the creation of new indexes is the addition of new elements to existing indexes. Among the most obvious and potentially important is the addition of the new Bibliographic field 264 ("Production, Publication, Distribution, Manufacture, and Copyright Notice"), subfield $a to the "Publisher Location" (pl:) index, subfield $b to the "Publisher" (pb: and pb=) index, and both subfields to the "Keyword" (kw:) index. If my count is correct, we have added dozens of new and/or existing fields and/or subfields to at least twenty existing Bibliographic indexes and at least five existing Authority indexes since 2008.

Perhaps most significantly, we have worked many of the appropriate RDA entity attributes fields into our "Material Type" (mt: and mt=) Bibliographic indexes. All of those are documented in the "Format/Document Type Values and Codes", "Material Type Names and Codes" and "RDA Terms and Codes" sections of the document "Searching WorldCat Indexes" (http://www.oclc.org/support/help/searchingworldcatindexes/Default.htm).

The Connexion browser was most recently updated in May 2012. A full list of recent Connexion browser enhancements is available at http://www.oclc.org/connexion/interface/browser/recent.en.html.

The Connexion client Version 2.50 was released in November 2013. Connexion client Version 2.51 was released on April 16, 2014. This most recent release addresses an export problem tied to eleven specific MARC-8 characters and affects only libraries that export with the MARC-8 character encoding selected. This issue is only with the Windows-based Connexion client; it does not affect the Web-based Connexion browser interface. OCLC will support both 2.50 and 2.51 for the foreseeable future. A full list of recent Connexion client enhancements is available at http://www.oclc.org/connexion/interface/client/recent.en.html.

Beginning with the release of Connexion client Version 2.40 in March 2012 and the updating of the Connexion browser in May 2012, several RDA-related improvements have been made. For RDA workforms, you may set an option in the client (Tools > Options > RDA tab) or browser (General tab > Admin > Preferences) to use RDA versions of the existing AACR2 workforms to create records. You may set the options separately for bibliographic and/or authority workforms. Existing AACR2 workforms open by default when you create new records unless you set the RDA workform option(s). You may additionally select the new RDA Toolkit IP authentication option to link to the RDA Toolkit without having to re-enter your RDA Toolkit username and password in Connexion.

Looking forward to the full implementation of OCLC's GLIMIR Project (Global Library Manifestation Identifier) (Gatenby, 2012), both Connexion interfaces now allow you to set an option to show search results in GLIMIR clusters of WorldCat bibliographic records that have different languages of cataloging for the same work (called "parallel" records). For each cluster, GLIMIR search results will show the number of records that your library holds, the total number of holdings, and the total number of records. GLIMIR clusters will make it easier to identify and select the exact record you need for cataloging. You will also be able to show the GLIMIR cluster for any displayed bibliographic record by using a new menu item Cataloging > Show > All GLIMIR Cluster Records. At the present time, OCLC strongly urges users not to select the GLIMIR option because many records in WorldCat do not yet contain GLIMIR information. OCLC will announce when this option is available for use.

Behind the scenes and in conjunction with the many indexing changes that have already been touched upon, corresponding fine-tuning of all WorldCat matching is ongoing, incorporating RDA elements into the existing algorithms. This applies not only to all indexing and searching, but also to all batchloading, to Duplicate Detection and Resolution (DDR), and to GLIMIR. As new RDA elements, fields, subfields, and codes are implemented, we also have to readjust existing validation rules so that data relationships continue to make sense, to the extent that they can.

The current "OCLC RDA Policy Statement," which has been in effect since RDA Day One, March 31, 2013, is located at http://www.oclc.org/en-US/rda/new-policy.html. But it has a history that reaches back through the RDA testing period in 2010, and is deeply informed by the release of the *Report and Recommendations of the U.S. RDA Test Coordinating Committee* (2011) in June 2011 and especially the "Report of the PCC Post-Implementation Hybrid Bibliographic Records Guidelines Task Group" (2012) in October 2012. OCLC cooperative members contributing original cataloging are NOT required to submit RDA records now or at any time in the foreseeable future. Institutions are free to continue cataloging according to AACR2.

During early 2012, OCLC made widely available for comment a discussion paper, "Incorporating RDA Practices into WorldCat" (http://www.oclc.org/en-US/rda/discussion.html), which laid out potential policies and actions regarding how RDA data and practices might be incorporated more fully into WorldCat. Among the many topics covered were: upgrading records done under older cataloging rules, adding RDA elements to non-RDA records, potential automated conversions of records. After the comment period (which lasted from February 15 through April 15, 2012), we thoroughly reviewed users' suggestions and comments and tried to determine what policies would work best both for the cataloging community and for library users. We also kept in mind the dual roles of WorldCat as a catalog and WorldCat as a repository of bibliographic data. The work of Program for Cooperative Cataloging (PCC) RDA task groups also helped to inform these most important discussions. The resulting "OCLC RDA Policy Statement" was based on all of this, including the overwhelmingly positive and thoughtful comments that we have received from members of the OCLC cooperative. More than 40 substantive and usable comments and suggestions came to OCLC during the two-month comment period.

By far, the most controversial idea in the OCLC discussion paper related to the General Material Designation (GMD). We decided to follow the PCC Hybrid Bibliographic Records report. GMDs will remain in non-RDA records until March 31, 2016, that is, for three years following RDA Day One. GMDs should be removed from records being recataloged and recoded to RDA and should not be included in any RDA record; 33X fields should be used instead.

Regarding original cataloging, when adding a new record unique to WorldCat, the records may be coded for RDA (Desc: i or c, 040 subfield $e rda), AACR2 (Desc: a), or any other recognized cataloging code. When creating a new record with English as the Language of Cataloging, consult the LC/NACO Authority File and use forms of access points found there, regardless of whether they are coded for RDA. The LC/NACO file will continue to be the source of authorized name and title access points for all records cataloged in English in WorldCat. OCLC asks catalogers to control all controllable headings to facilitate the updating of headings as authority records are updated to conform to RDA. For copy cataloging, libraries may choose to use existing records as is or locally edit them as needed. Catalogers are not required to upgrade master records to change them from non-RDA codes to RDA. Do not change RDA master records to conform to an earlier cataloging code.

With the goals of comprehensibility and consistency for the end user in mind, OCLC has been making some of the following changes to existing bibliographic records with a Language of Cataloging of English (040 subfield $b eng) when possible and appropriate:

- Adding 336, 337, and 338 fields (Content/Media/Carrier Type).
- Spelling out non-transcribed abbreviations in 255, 300, 500, 504, and other fields.
  - p. → pages.
  - ill. → illustrations.
- Converting Latin abbreviations to English equivalents in 245, 260, and other fields.
  - [s.l.] → [place of publication not identified].
  - [s.n.] → [publisher not identified].
  - ca. → approximately.
- Converting dissertation notes in 502 field to multiple subfields.
- Updating headings (Authorized Access Points) in accordance with RDA.

All of these Hybrid Record policies are in accord with the comments and suggestions of members of the OCLC cooperative from the RDA discussion paper, and the recommendations of the two task groups of the Program for Cooperative Cataloging (PCC) that studied the issue: the PCC Task Group on Hybrid Bibliographic Records (http://www.loc.gov/aba/pcc/rda/RDA%20Task%20groups%20and%20charges/Hybrid-Report-Sept-2011.pdf) for the interim period between the RDA Test in 2010 and RDA Day One in March 2013 and the PCC Post-Implementation Hybrid Bibliographic Records Guidelines Task Group (http://www.loc.gov/aba/pcc/rda/RDA%20Task%20groups%20and%20charges/PCC-Hybrid-Bib-Rec-Guidelines-TG-Report.docx) for after RDA Day One. These two reports were issued in September 2011 and October 2012, respectively.

In addition to allowing users to make the same sorts of additions of RDA elements to non-RDA records that OCLC is doing in an automated fashion (such as spelling

out abbreviations in non-transcribed areas, converting 502s to subfielded versions, adding 336/337/338 fields, etc.), OCLC also encourages users to add other RDA elements to existing non-RDA records even when they are not re-cataloging the entire record according to RDA. Candidates for such editing include, but are not limited to the adding of relator terms to access points and the adding of complete statements of responsibility in 245 (in place of "[et al.]"). As the "OCLC RDA Policy Statement" says: "When adding or editing one or more such elements in the master record without re-cataloging the record to RDA, do not code the record as RDA. OCLC will generally adhere to the PCC Guidelines on Hybrid Bibliographic Records and expects member libraries editing existing records to add selected RDA elements to follow these guidelines." (OCLC, 2013)

Bibliographic records thoroughly recataloged to RDA should be changed to *Desc* (Leader/18) coded as *c* or *i* as appropriate and have field 040 subfield $e coded as *rda* added.

Bibliographic records with only individual fields updated to reflect RDA practices should retain the indication of the rules under which they were initially cataloged; that is, no changes would be made to the coding of *Desc* (Leader/18) and field 040, subfield $e would be neither added nor changed.

Finally, for members of the OCLC cooperative who are interested in UNIMARC output, in August 2012, OCLC introduced OCLC WorldShare Metadata Collection Manager. Collection Manager automatically delivers WorldCat MARC records and maintains WorldCat holdings, on a one time and/or an ongoing basis, for all of your collection or for subsets, including licensed, digital, and physical materials. The service ensures that the bibliographic metadata for all titles and access URLs for electronic content are continually updated in your discovery interface. This provides better user access to your collections. OCLC continues to expand WorldShare Metadata Collection Manager capabilities. WorldShare Metadata Collection Manager provides MARC records for e-collections registered in the WorldCat knowledge base, collections of any format based on WorldCat queries, and updated records for items held by your library in WorldCat. WorldCat MARC records can be output in various schemas including MARC21, MARC XML, Dublin Core, and UNIMARC. UNIMARC output options include both UTF-8 Unicode since December 2013 and ISO 5426 since March 2014.

Reference

Gatenby, J., 2012. *GLIMIR: The Potential Impact*. [pdf] Available at: http://www.oclc.org/content/dam/research/presentations/Gatenby/GLIMIR_thepotentialimpact.pdf [3. 12. 2014].

IFLA Study Group on the Functional Requirements for Bibliographic Records, 1998. *Functional Requirements for Bibliographic Records: Final Report*. München: K.G. Saur.

Joint Steering Committee (JSC), 2005. *Outcomes of the Meeting of the Joint Steering Committee Held in Chicago, U.S.A, 24–28 April 2005*. [online] Available at: http://www.rda-jsc.org/0504out.html [3. 12. 2014].

Joint Steering Committee (JSC), 2008. *RDA: Resource Description and Access: Full draft of RDA*. [online] Available at: http://www.rda-jsc.org/rdafulldraft.html [3. 12. 2014].

Library of Congress, 2009a. *MARC 21 Bibliographic: 336 – Content Type (R).* [online] Available at: http://www.loc.gov/marc/bibliographic/bd336.html [3. 12. 2014].

Library of Congress, 2009b. *MARC 21 Bibliographic: 337 – Media Type (R).* [online] Available at: http://www.loc.gov/marc/bibliographic/bd337.html [3. 12. 2014].

Library of Congress, 2009c. *MARC 21 Bibliographic: 338 – Carrier Type (R).* [online] Available at: http://www.loc.gov/marc/bibliographic/bd338.html [3. 12. 2014].

Library of Congress, 2011. *MARC 21 Bibliographic: 264 – Production, Publication, Distribution, Manufacture, and Copyright Notice (R).* [online] Available at: http://www.loc.gov/marc/bibliographic/bd264.html [3. 12. 2014].

Library of Congress, 2012. *The Library of Congress Announces Modeling Initiative (May 22, 2012).* [online] Available at: http://www.loc.gov/bibframe/news/bibframe-052212.html [3. 12. 2014].

Library of Congress, 2014. *MARC Format Overview.* [online] Available at: http://www.loc.gov/marc/status.html [3. 12. 2014].

OCLC, 2013. *OCLC RDA Policy Statement.* [online] Available at: http://www.oclc.org/rda/new-policy.en.html [3. 12. 2014].

Report and Recommendations of the U.S. RDA Test Coordinating Committee, 2011. [pdf] Available at: http://www.loc.gov/bibliographic-future/rda/source/rdatesting-finalreport-20june2011.pdf [3. 12. 2014].

Report of the PCC Post-Implementation Hybrid Bibliographic Records Guidelines Task Group, 2012. [docx] Available at: http://www.loc.gov/aba/pcc/rda/RDA%20Task%20groups%20and%20charges/PCC-Hybrid-Bib-Rec-Guidelines-TG-Report.docx [3. 12. 2014].

Weihs, J. ed, 1998. *The Principles and Future of AACR: Proceedings of the International Conference on the Principles and Future Development of AACR: Toronto, Ontario, Canada, October 23/25, 1997*. Ottawa: Canadian Library Association, London: Library Association Publishing, Chicago: American Library Association.

Weitz, J., 2011. Judgment and Imagination: Carrying Cataloging Through Times of Change. In: Sanchez, E. R. ed. *Conversations with Catalogers in the 21st Century*. Santa Barbara, California: Libraries Unlimited. pp. 169–174.