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CONVERSION OF CATALOGUE RECORDS FROM AACR2 TO RDA FORMAT: WHAT, HOW AND WHEN?

By

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Abstract

The paper outlines what it entails to convert catalogue records from AACR2 to RDA format, and how this conversion can be done. An attempt is also made to advise on when the conversion of the records can be done, to make the cataloguing process free of stress. Practical examples are given on how this can be done to achieve success in cataloguing units in all types of libraries.

Introduction

The Resource Description and Access (RDA) came about as a result of the effort to make the Anglo American Cataloguing Rules 2 (AACR2) more user-friendly. It was bid to make the cataloguing codes to help cataloguers and all involved with metadata for collections more principles-based and internationally accepted. In 1990 the International Federation of Library Associations and Institutions (IFLA) chartered a committee to study the way that bibliographic records function in relation to the needs of users. After several interim drafts, the committee produced Functional Requirements for Bibliographic Records (FRBR) in 1997 (IFLA, 1997). FRBR which is usually described as a new conceptual model of the bibliographic universe (Joint Steering Committee for Development of RDA) has had most of the concepts expressed in it implicit in cataloging and authority work for decades, so they are not unfamiliar. However, in FRBR they are more explicitly defined and placed within a principle-based theoretical framework (Riva, 2007).

This is not the focus of this paper, but rather what it entails to convert AACR2 catalogue records to RDA format, how it can be done and when, to successfully make catalogues compliant. It is pertinent to note that the catalogue records that can readily be converted are the electronic catalogues that are already online or in the process of being put online through Integrated Library Management Systems (ILMS). These systems have to be systems that are MARC 21 compliant, that is, they are already following the Machine Readable Catalogue (MARC) format.

Conversion of Cataloguing Records to RDA Format: What it entails

Converting catalogue records to RDA format entails getting familiar with the RDA

Toolkit in the first instance. The RDA Toolkit is an integrated, browser-based, online product that allows users to interact with a collection of cataloging-related documents and resources, including RDA. The Tool kit consists of the following:

1. The AACR2 (to help a cataloger knows where to begin);
2. Library of Congress Policy Statements (LCPS);
3. Workflows and other procedural documentation that is created by subscribers and can be shared within an organization or with the entire community of subscribers;
4. Mappings of RDA to various schemas, including MARC 21 (American Library Association, 2010).

All these help the user in the bid to convert the catalogue records. It is assumed that the cataloguer or metadata personnel is already very familiar with the AACR2 and will only be learning the differences in the way the rules are applied in RDA and will be making the changes. However, familiarizing oneself with RDA and learning to use the RDA Toolkit can be a daunting and challenging task even for experienced users (Kishimoto, 2013). This notwithstanding, with persistent use, the changes become easy to master.

Many changes to the RDA Toolkit have been made since its implementation in 2013 but the good thing about it is that there is a constant guide and update which is found online. The updates to the toolkit are put online and users can consult in real time. A new release of the RDA Toolkit for example came out in August 2016. It contains corrections, revised examples, and other Fast Track changes from the RDA Steering Committee (RSC). Details on these August changes are available in RSC/Sec/3(<http://rda-rsc.org/rsc/sec/3>) and RSC/Sec/4(<http://rda-rsc.org/rsc/sec/4>) on the RSC site (<http://rda-jsc.org>). The release included a significant expansion of the glossary to include the complete RDA vocabularies and terms related to cataloging practice, as well as the RDA Elements.

Revisions to the German language translation and also revisions to English language MARC/RDA mappings are included. So also, updates to Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS), and Music Library Association Best Practices (MLA BP), as well as policy statements from Committee for Library Standards for the application of RDA in Germany, Austria, and Switzerland, known as Anwendungsrichtlinien (D-A-CH AWRs) are part of the August 2016 release. A complete list of the revised LC-PCC PSs is available on the Library of Congress website (http://www.loc.gov/aba/rda/lcps_access.html).

Conversion to RDA catalogue records requires taking the updates into consideration and making the necessary changes as directed in the toolkit. The procedures for doing this will be discussed in the next section.

Procedures for Conversion of Cataloguing Records to RDA Format

Mastraccio (2013) gave good advice on procedures to adopt for using the RDA Toolkit. This is reproduced here as it is the best advice any cataloguing unit can get:

1. The first step is to relax; at this stage major workflow changes are not required.
2. Make sure your local system is set up to accept new MARC fields. Many tags have been added and will continue to be added so you need to be sure your system will accept records with new fields. Use the MARC21 Formats documentation for both bibliographic and authority records. A list of RDA specific MARC fields can be found in the Library of Congress documentation found at <http://www.loc.gov/marc/rdainmarc-10-12.html>.
3. Routinely check the Library of Congress website which lists RDA news and changes so you can keep up with implementation practices that may impact how you do things in the future.
4. For development details, including helpful frequently asked questions (FAQ's) and presentations, check the website of the Joint Steering Committee for Development of RDA.
5. Use the Library of Congress RDA training webinars found at <http://www.loc.gov/catworkshop/>.
6. Find out if there are any planned training sessions available. Check with your systems vendor or local and national library associations. See ALCTS Online Learning website at <http://www.ala.org/alts/confevents>.
7. Use RDA Tool kit helps found at <http://access.rdatoolkit.org> and global workflows and maps (under the Tools tab) available online.
8. Determine what you need for your local system and train your staff to recognize, input, and use the new data. If your system will seamlessly pull data from former (AACR2) and current (RDA) records then less conversion cleanup is needed.
9. If there are global changes that would improve the usefulness of your library data, find out what can be done, by whom, both in a one-time retrospective conversion project and for on-going cataloging.
10. If you get records through any type of MARC record service or authority service you may want or need to make some changes to your profile to be sure you are getting what you need in this new cataloging environment. For example, many libraries previously asked for all relator terms (example: 700\$e) to be removed, but, since relator terms (relationship designators) are used extensively in RDA, it may be a good idea to change that profile option.
11. If you are considering getting a new Integrated Library System, be sure the system can use all the new fields in RDA and will be able to index names

properly, especially people with different relator terms. You will also want to know that any new system is designed to easily extract or convert your MARC data to another format, probably linked web-data. (Mastraccio, 2013).

These are broadly the tips needed to implement the changes in the conversion process. In addition, I would say, if you have any difficulty that you cannot tackle using the 11 points above, don't panic; simply ask from a library that has done it before. There is no harm in sharing knowledge or learning from more experienced persons or institutions.

When Conversion of Cataloguing Records from AACR2 to RDA Format becomes imperative

The question of when all these processes can commence can be asked. The simple answer is, when the necessary infrastructure is on ground. When the institution has decided to shift from manual to electronic cataloguing would be a good time. As soon as the decision to use an integrated library management system is made, it is necessary to see if the system can allow the RDA to be implemented within it.

The next step is to train the staff in the use of the RDA Toolkit. For now, there are 30 days free training opportunities online. This could be used to advantage and once the basics are learnt, work on making changes can commence. Trained manpower is necessary.

It becomes imperative to convert cataloguing records to RDA format when the users are not getting as much from the library catalogue as they should. The conversion makes search in the catalogue broader due to the flexibility and the use of less technical language in description, therefore it is time to change when users cannot easily find what they want from the library.

Recommendations for Successful Conversion

Successful conversion from AACR2 to RDA format is better achieved with teamwork effort. The members of the institution especially the professional librarians and paraprofessionals need to work together to achieve the goal. The emphasis on working as a team is necessary because the work is routine and tends to be tedious. With the spirit of encouraging one another, the work becomes second nature and the tags, fields and rules stick in one's mind. It thus becomes easy even though it may have started off being tough or difficult.

Conclusion

Conversion of AACR2 records to RDA format is a systematic exercise that needs concerted effort, time and lots of training. The tools are available readily online and as such, what should be done, how it should be done, and when, is a function of the degree of preparedness of the institution and the level of commitment, to making the conversion a success. No rule on procedure is rigid and with the firm belief that it is possible, all obstacles will be overcome.

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