1. **Agenda for today’s meeting**
   Marlene Van Ballegooie requested that an OCLC update be added. The agenda was approved with the addition.

2. **Minutes from the March 7, 2016, meeting**
   The minutes were approved.

3. **LAC Research Seminar on RDA Developments** (Fabiano Rocha & Elizabeth Ridolfo. See detailed notes below)
   There were five presentations at the Seminar. Christine Oliver, Head of Resource Description and Metadata Services of the University of Ottawa, indicated that RDA will evolve in the future because of (1) changing technological advancements, (2) working with a broader, more international (non-Anglo-American) community, and (3) aligning with international standards.

   Simon Berney-Edwards, Director of Professional Services at the Chartered Institute of Library and Information Professionals, spoke of goals for the future. These goals are (1) to make RDA an internationally recognized standard, (2) to increase the adoption of RDA in countries around the globe, and (3) to ensure RDA’s sustainability with the relevant governance structure in place. There are currently six national bibliographic agencies participating: Africa, Latin America and the Caribbean, North America, Asia, Europe, and Oceania.

   James Hennelly, Director of ALA Digital Reference of ALA Publishing, Chicago, discussed the RDA Toolkit. It is available in 48 countries in six languages. There are 8,500 users
with usage increasing. Customizable preferences for the profile can be set at the administrator’s level.

Gordon Dunsire, Chair of the RDA Steering Committee, introduced RDF (Resource Description Framework), a standard model that allows the merging of data even if the underlying schemas differ; and RIMMF (RDA in Many Metadata Formats), which links descriptive data between related entities.

Pat Riva, Associate University Librarian, in Collection Services at Concordia University, spoke of the next stage in bibliographic models FRBR-Library Reference Model. It aims to be a high-level conceptual reference model developed within an entity-relationship modelling framework.

4. CAUG Terms of Reference Update: Final Draft
With the addition of “and affiliated” so the phrase reads “1 member from each campus and affiliated library that contributes records to the shared catalogue”, the draft was approved.

5. Archived CAUG meeting minutes (Kate MacDonald)
As part of the review of committees across campus, Kate is looking into options for moving some CAUG meeting materials off the Cataloguing website & libguide into a Confluence space.

Advantages:
- Meeting minutes are currently available to public; there are occasions where specific matters discussed, e.g. details on assessing LSPs, can’t be included in the minutes because there is currently no private space for this type of material.
- Committees across campus are moving a lot of meeting materials to Confluence so they are all located in one place to enable easier information sharing across UTL on matters of shared interest.
- Confluence has functionality for collaboration on documents together in a private forum; e.g. for upcoming annual report this would be useful.

Disadvantages:
- All CAUG members will need a login to Confluence to access information that is not public, but this is not an insurmountable problem, and many CAUGers may already have a login for other committee work. Kate will notify everyone of how to get a login after organizing the CAUG space on Confluence.
6. **Training schedule for RDA**

Regular training for RDA will begin no earlier than September 2016 with the aim of implementing RDA cataloguing across the system in the first half of 2017. Christine Oliver has offered to be the trainer for a smaller group, and they will, in turn, develop training and organize training materials for reference for all UTL cataloguing staff. The preliminary sessions will focus on general formats with specific formats following later in the fall.

7. **RDA fields**

Endeca has been fixed so the 336, 337, and 338 fields may be left in the record.

8. **RDA Relator Terms** (Alastair Boyd, [See full presentation slides below](#))

In working with RDA, it is necessary to identify whether data is a manifestation, an expression, or a work, as each type of data is entered in one place. This means that RDA rules are shifted around in the RDA Toolkit.

- Every element in an RDA record will have a subject:predicate:object URI structure of linked data.
- For original cataloguing and imported RDA records, we should now be adding relationship designators after |e to name (creator) fields 1XX and 7XX or relator codes after |4.
- Useful resources:
  - Relationship Designator Terms
  - [PCC Training manual](#) on relationship designators.
- RDA is Decisions on policies to be identified for UTL. These will largely follow LC and PCC guidelines.

9. **UTL in WorldCat**

Several changes will affect UTL’s records in WorldCat. First, it is necessary to make sure that UTL’s holdings that are now in WorldCat are correct (formerly deletions could not be processed). Secondly, UTL records used to be added to WorldCat quarterly and will now be added nightly. There will also be a new location code for the UTL as a group in addition to the code for the individual library.

10. **Future CAUG meetings**

Meeting attendees agreed that moving the first CAUG meeting of the 2016-2017 academic year to October would be preferable to September. Dates to be announced.
Presentation 1: RDA: Next steps in its evolution by Christine (Chris) Oliver, Head, Resource Description and Metadata Services, University of Ottawa

- Talked about RDA as an evolving standard
- 2010 not completed; starting point
- Vision for bibliographic data
- List of deferred issues
- 165 issues of varying priorities
- As it is implemented, it evolves with the changing technological advancements
  - More machine-actionable data
  - Long string broken down into precise elements
  - E.g., string 1 volume 25 x 35 cm
- Different linguistic and cultural communities
  - Need to get out of Anglo-American mindset; issues of capitalization
  - Bilingual Canada + Germany: awareness of Anglo-American centris and bias
  - Internationalization: distinction between two terms not applicable in other languages
  - Omit the initial article: OK for English and French but NOT OK for German
- Aligning with international standards: FRBR, FRAD, FRSAD
  - FRSAD in 2011: creates a place to acknowledge the importance of subject relationship
  - RDA in Future technological environments: RIMMF prototype
  - Chapters 6, 9, 10 and 11 (work, expression)
  - Constructing access points vision: create access points on the fly
  - RDA relationship relators
  - Disambiguity: in AACR2, the current requirement is using the date of birth to disambiguate persons
  - With RDA, relationship relators (i.e., professor, sailor) Functional Requirement Models: consolidate three models
    - FRBR (person)
    - FRAD (entity)
    - FRSDA (nomen = broader entity))
- RDA will cause us to adjust our understanding of bibliographic data

Presentation 2: Creating a vision, strategy and new governance model to support the development of RDA by Simon Berney-Edwards, Director of Professional Services, The Chartered Institute of Library and Information Professionals

- Spoke about the governance review
- Approved on Tuesday, April 26, 2016
- The importance relates to Chris Oliver’s 3 points:
  - Technological advancements
  - Diverse linguistic and cultural communities
  - Need to align with international standards
- 2015-2020
  - Make it internationally recognized standard
- Increase the adoption of RDA in countries around the globe
- Ensure that it remains sustainable with relevant governance structure in place
- Flexibility to work with constituents

- 6 national institutes (IFLA’s definition of what constitutes national bibliographic agency)
  - The national bibliographic agency (NBA) is:
    - “the organizational unit established within a country's library system, which undertakes responsibility for the preparation of the authoritative and comprehensive bibliographic records for each new publication issued in the country, making the records in accordance with accepted international bibliographic standards and publishing them with the shortest possible delay in a national bibliography, which appears on a regular basis” (International Federation of Library Associations, IFLA International Office for UBC, & UNESCO, 1979) <http://www.ifla.org/node/8266>

- Able to submit an application; elected
- Online infrastructure
  - To enable regional participants to work within this environment/platform: space to work and develop proposals
  - RDA Steering Committee Wiki
  - Web Conferencing
  - Feedback Tool
  - RDA Board Papers

Presentation 3: Update from the director of RDA Toolkit by James Hennelly, Director, ALA Digital Reference, ALA Publishing, Chicago
- Available in 48 countries
- 8500 users
- 6 languages: English, French, Spanish, German, Finnish, and Italian
- Europe: preference for national subscriptions; also cases like German language countries (Germany, Austria and Switzerland)
- Toolkit usage gradually increasing
• Offers RDA Implementation Course (for institutions who want to make the transition from AACR2)
• RDA Essentials: condensed print version for infrequent cataloguers
• There will be a webinar intro for the publication (free)
• Master profile: customizable preferences set at the administrator’s level
• Toolkit redesign structure (next 2 years)
  o List of ideas to include in the design: responsive design, accessibility issues

Q & A
Q: It seems that there are lots of people who are still not convinced about the usefulness of RDA. How to engage those who are still on the fence?
• Educate people about the misconceptions;
• marketing outreach
• establish a communications group
• have a more strategic approach by engaging national libraries and academic communities
• What is the big difference?
• Getting out of MARC and think more of relationships
• Assess where the fears are
• Online training presence
• Perhaps provide more online office hours
• For libraries, it is still a MARC-world
• Possibilities of a MARC-free world with tools such as RIMMF
• Put pressure on vendors to provide products

Presentation 4: RDA and Semantic Data by Gordon Dunsire, Chair, RDA Steering Commitee
• FRBR (IFLA)
• FRBRoo: formal ontology intended to capture and represent the underlying semantics of bibliographic information and to facilitate the integration, mediation, and interchange of bibliographic and museum information
  o Conceptual reference model; always based on compatibility with RDA Framework
• Linked Data and RDF (Resource Descriptive Framework)
  o Semantic web
  o Cloud
  o Connecting the crowd (universe of human discourse)
• RDF Graph for Manuscripts
  o In principle, keep adding links
• Complexity of relationships
  o Diagram using FRBR entities and relationships
• RDA in RDF format
  o Value vocabularies (controlled terminologies)
  o Example: RDA carrier type vocabulary
• RDA Reference:
  o Elements, attributes, relationships
  o Other glossary terms
  o Translations, partial translations
• Canonical URIs are codes and apart from Anglo-American content
• Multilingual linked data
• Vocabulary: carrier type (computer disk, computadora de disco, etc)
• RIMMF (RDA in Many Metadata Formats):
  o Visualization tool to help cataloguers get used to thinking about RDA instead of AACR2/MARC
  o Allows the cataloguer to enter descriptive data about the attributes of FRBR entities and then link the descriptive data between related entities
• Polylingual data
• User profile switch determines display of information
  o French cataloguer (French interface), German expression, English agency
• RIMMF:
  o Supports linked data
  o Compatible with FRBR
  o Semantic Web
  o FUN!

Presentation 5: The next stage in our bibliographic models: FRBR-LRM by Pat Riva, Associate University Librarian, Collection Services, Concordia University

• FRBR-Library Reference Model
  • Aims to be a high-level conceptual reference model developed within an entity-relationship modelling framework. The model covers bibliographic data as understood in a broad, general sense.
  • Framework that can be expanded (expansion points – not substitute to cataloguing rules)
• 5 USER TASKS:
  o Find
  o Identify
  o Select
  o Obtain
  o Explore

11 Entities for LRM:

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• RES
- is a superclass of all other entities that are explicitly defined, as well as of any other entities not specifically labeled (i.e., Agatha Christie, Eiffel Tower, horses)

- **ENTITIES:**
  - Work, expression, manifestation, item (i.e., Agatha Christie’s *they do it with mirrors*, Homer’s *Odyssey*)

- **AGENT**
  - An entity capable of exercising responsibility relationships relating to works, expressions, manifestations, or items (Person: Agatha Christie; Collective Agent: IFLA, Random House)

- **NOMEN:**
  - Whatever appellation is used to refer to any entity found in the bibliographic universe (i.e. Nomens for persons, Agatha Christie OR Lady Mallowan OR Mary Westmacott; Nomens for corporate body: United Nations OR Nations Unies or Nazioni Unite)

- Since PERSON is AGENT
  - And
  - AGENT created WORK
  - Then (relationship)
  - PERSON created WORK

- **Representativity (Expression)**
  - 37 attributes
  - Data describing instances of entities

- Deadline for feedback: May 1, 2016

Detailed information about the content of this presentation can be found in:
RDA: a Relational Database Model Derived from FRBR

Scenario 1: Relational / object-oriented database structure

RDA: a Relational Database Model Derived from FRBR

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During the 19th and most of the 20th century, discussions of style revolved around pure formalism or pure functionalism. Style, as the way of assembling forms, was trapped in producing consistency and sameness across architectural forms. The book 'The Function of Style' is the third in a series at Harvard GSD which focused at researching a contemporary idea of style in architecture. The previous publications, The Function of Form, investigated the architecture of the latter part of the 20th century which defies the senselessness and anonymity of the early 20th century city. The aim was to establish whether the systems of differentiation identified earlier were exploring their style as formalism or they were based on a new idea of style that would work with form and function simultaneously as a way to use form to subvert function as set out for each type by early 20th century modernism. The book 'The Function of Style' continues to interrogate the form-function relationship of those projects. It focuses particularly on the history of drawing techniques of describing different concepts of function. All will be shown through drawings that describe among other criteria the structural function [arrangement of activities or materials], the physical function [such as acoustics, traffic, lighting], and the psychological function or the social function of built forms.
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+ B: Abbreviations and Symbols
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+ J: Relationship Designators: Relationships between Works, Expressions, Manifestations, and Items
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+ L: Relationship Designators: Relationships Between Concepts, Objects, Events, and Places
1.2 Relationship Designators for Persons, Families, and Corporate Bodies Associated with a Work

1.2.1 Relationship Designators for Creators

Record an appropriate term from the following list with the authorized access point or identifier for a creator of a work (see 19.2 RDA). Apply the general guidelines on using relationship designators at I.1 RDA.

- **architect** A person, family, or corporate body responsible for creating an architectural design, including a pictorial representation intended to show how a building, etc., will look when completed.

- **landscape architect** An architect responsible for creating landscape works.

- **artist** A person, family, or corporate body responsible for creating a work by conceiving, and often implementing, an original graphic design, drawing, painting, etc.

- **book artist** An artist responsible for creating art works that exploit the book form or alter its physical structure as part of the content of the work.

- **calligrapher** An artist responsible for creating a work of calligraphy where the focus of interest lies in the aesthetic value of the calligraphic text rather than in the content or meaning of the text.
RDA-FRBR Entities/Attributes Expressed in MARC 21 Records

Scenario 2: Linked bibliographic and authority records

BIBLIOGRAPHIC RECORD

- Authorized access point representing the expression* [link]
- Title proper*
- Statement of responsibility relating to title proper
- Edition statement
- Publication statement
- Carrier type
- Extent
- Nature of the content
- Variant title*
  - Authorized access point representing person associated with the expression* [link]
  - Relationship designator
- Authorized access point representing person associated with the expression* [link]
- Relationship designator
- Authorized access point representing related work* [link]

HOLDINGS RECORD

- Item-specific carrier characteristic
- Custodial history of item
- Restrictions on access

NAME AUTHORITY RECORD

- Authorized access point representing the person*
  - Variant access point representing the person*
  - Authorized access point representing related person*

NAME-TITLE AUTHORITY RECORD

- Authorized access point representing the expression*
  - Variant access point representing the expression*
  - Authorized access point representing related work*

NAME AUTHORITY RECORD

- Authorized access point representing the person*
  - Variant access point representing the person*
  - Authorized access point representing related person*

NAME-TITLE AUTHORITY RECORD

- Authorized access point representing the work*
  - Variant access point representing the work*
  - Authorized access point representing related work*
## RDA-FRBR Entities/Attributes Expressed in MARC 21 Records

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<tr>
<td>300</td>
<td>110 pages : $billustrations, $c20 cm</td>
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<tr>
<td>600</td>
<td>00 $aIphigenia$c(Mythological character)$vDrama.</td>
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<tr>
<td>700</td>
<td>1 $aPascal, Roy, $d1904-$etranslator.</td>
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<tr>
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<td>1 $aSwales, Martin, $eeditor.</td>
</tr>
<tr>
<td>830</td>
<td>0 $aAngel classics.</td>
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RDA Relators and Linked Data Principles

RDA in RDF

- There’s another side to RDA, beyond the rules
- Developed out of a 2007 meeting between representatives from the JSC and DCMI.
- Vision is that RDA data elements could be the basis for machine interoperability of library data in a Linked Data environment in the future.
Resource Description Framework (RDF)

- Primary data model for Linked Data
- It’s not a format; it’s a framework for describing data.
- Can be used to represent information about *things* (i.e. book, person, idea, etc.)
- RDF allows you to link a resource to other resources on the Web.
RDF Triples Describe Relationships

- In the RDF model the concept of triples is used to describe a relationship between two things.
- subject – predicate – object

Yasunari Kawabata
  IsAuthorOf
  Yukiguni

- Each triple is a statement about a resource.
http://viaf.org/viaf/97450170/ \hspace{1cm} (subject)

\hspace{1cm} (predicate) \hspace{1cm} http://purl.org/dc/elements/1.1/creator

\hspace{1cm} Yukiguni \hspace{1cm} (object)
RDF triples, create RDF graphs

- Statements combine to form graphs
- A graph is of no fixed size and contains no predetermined types of statements.
Scenario 2: Linked bibliographic and authority records

**BIBLIOGRAPHIC RECORD**
- Authorized access point representing the expression* [link]
- Title proper*
- Statement of responsibility relating to title proper
- Edition statement
- Publication statement
- Carrier type
- Extent
- Nature of the content
- Variant title*
- Authorized access point representing person associated with the work* [link]
- Relationship designator
- Authorized access point representing person associated with the expression* [link]
- Relationship designator
- Authorized access point representing related work* [link]

**HOLDINGS RECORD**
- Item-specific carrier characteristic
- Custodial history of item
- Restrictions on access

**NAME AUTHORITY RECORD**
- Authorized access point representing the person*
- Variant access point representing the person*
- Authorized access point representing related person*

**NAME-TITLE AUTHORITY RECORD**
- Authorized access point representing the expression*
- Authorized access point representing related work*

**NAME AUTHORITY RECORD**
- Authorized access point representing the person*
- Variant access point representing the person*
- Authorized access point representing related person*
## RDA-FRBR Entities/Attributes Expressed in MARC 21 Records

<table>
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<tr>
<th>Field</th>
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<td>1</td>
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<td>10</td>
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</tr>
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<td>245</td>
<td>10</td>
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</tr>
<tr>
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<tr>
<td>300</td>
<td>$a</td>
<td>110 pages ; $c 20 cm</td>
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<tr>
<td>336</td>
<td>$a</td>
<td>text $b txt $c rdacontent</td>
</tr>
<tr>
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<td>unmediated $b bn $c rdamedia</td>
</tr>
<tr>
<td>338</td>
<td>$a</td>
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<tr>
<td>490</td>
<td>1</td>
<td>a Angel classics</td>
</tr>
<tr>
<td>600</td>
<td>00</td>
<td>aIphigenia $c (Mythological character) $v Drama</td>
</tr>
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<td>700</td>
<td>1</td>
<td>a Pascal, Roy, $d 1904- $e translator.</td>
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<td>700</td>
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</tr>
<tr>
<td>830</td>
<td>0</td>
<td>a Angel classics.</td>
</tr>
</tbody>
</table>
RDA Relators for Contributors in UTL Original MARC Records

In original records, enhancing additional access points for contributors (700, 710, etc.) with relationship designations makes these access points potentially useful as linked data resources.

**Option A**: from the list in RDA Appendix I, add the appropriate relator term(s) in subfield |e after the authorized access point. E.g.,

|700|1| Sacristán Luzón, Manuel,|eeditor,|etranslator|

*Note: the AAP and subfield |e relator term(s) are linked with commas (except no comma after a hyphen)*

**Option B**: from the MARC Relator Code list ([http://www.loc.gov/marc/relators/](http://www.loc.gov/marc/relators/)) add the appropriate relator code(s) in subfield |4 after the authorized access point. E.g.,

|700|1| Sacristán Luzón, Manuel.|4edt|4trl|

*Note: the AAP and subfield |4 relator code(s) have no linking punctuation.*

Frequently-used Codes/Terms: [http://guides.library.utoronto.ca/ld.php?content_id=20364523](http://guides.library.utoronto.ca/ld.php?content_id=20364523)
Identifying relationships for Name-Title added entries is more cumbersome.

**EXAMPLE: Related work**

<p>| | | |</p>
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<th></th>
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<tbody>
<tr>
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<td>1</td>
<td>$a Nason, Alvin, $e author.</td>
</tr>
<tr>
<td>245</td>
<td>1</td>
<td>0 $a Essentials of modern biology / $c Alvin Nason ; abridged in collaboration with John D. Palmer.</td>
</tr>
<tr>
<td>500</td>
<td></td>
<td>$a Abridgement of the author's Textbook of modern biology.</td>
</tr>
<tr>
<td>700</td>
<td>1</td>
<td>$i Abridgement of (work): $a Nason, Alvin. $t Textbook of modern biology.</td>
</tr>
</tbody>
</table>

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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<tr>
<td>245</td>
<td>1</td>
<td>0 $a Textbook of modern biology / $c Alvin Nason.</td>
</tr>
<tr>
<td>700</td>
<td>1</td>
<td>$i Abridged as (work): $a Nason, Alvin. $t Essentials of modern biology.</td>
</tr>
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### EXAMPLE: Analytic Name-title entry

<table>
<thead>
<tr>
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<th>$a Jeosafá, $e author.</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td>1</td>
<td>2</td>
<td>$a O espelho de Machado de Assis em HQ / $c adaptação, Jeosa Fá ; roteiro e desenhos, João Pinheiro.</td>
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<tr>
<td>700</td>
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<td></td>
<td>$i Graphic novelization of (work): $a Machado de Assis, $d 1839-1908. $t Espelho.</td>
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<tr>
<td>700</td>
<td>1</td>
<td>2</td>
<td>$i Container of (work): $a Machado de Assis, $d 1839-1908. $t Espelho.</td>
</tr>
</tbody>
</table>

Note: Resource contains both the graphic novel and the poem Espelho.