

# Workflows



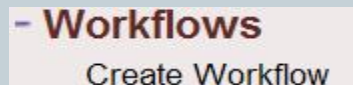
**RESOURCE DESCRIPTION AND ACCESS:  
A COBEC WORKSHOP PRECONFERENCE  
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# Creating Workflows



- You must be logged into your personal profile in RDA
  - It is helpful to have Instruction Numbers written down
  - **Click on Tools-Workflows>Create Workflow**
- Once named, Workflow can be saved continuously
    - Will appear in the Global Workflows section of the Tools tab



# Starting Template

**Create Workflow . . .**

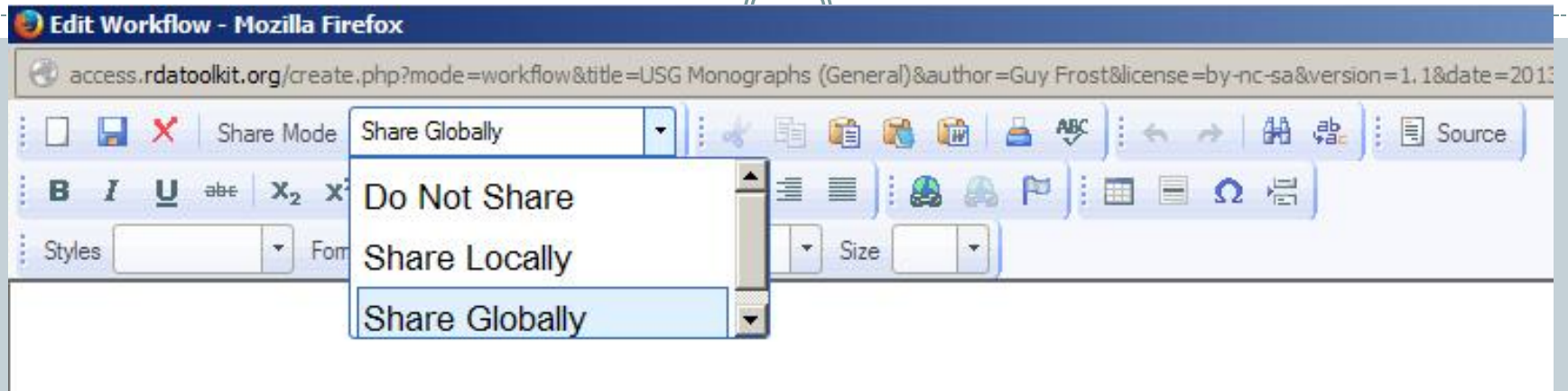
**Name Your Workflow . . .**

**Details About Your Workflow . . .**  
Author   
License  ⓘ  
Version  Date  (YYYY-MM-DD)  
Category  Language

**Description of Your Workflow . . .**

**Create Workflow . . .**  
☒ Create New  
☐ Copy Existing

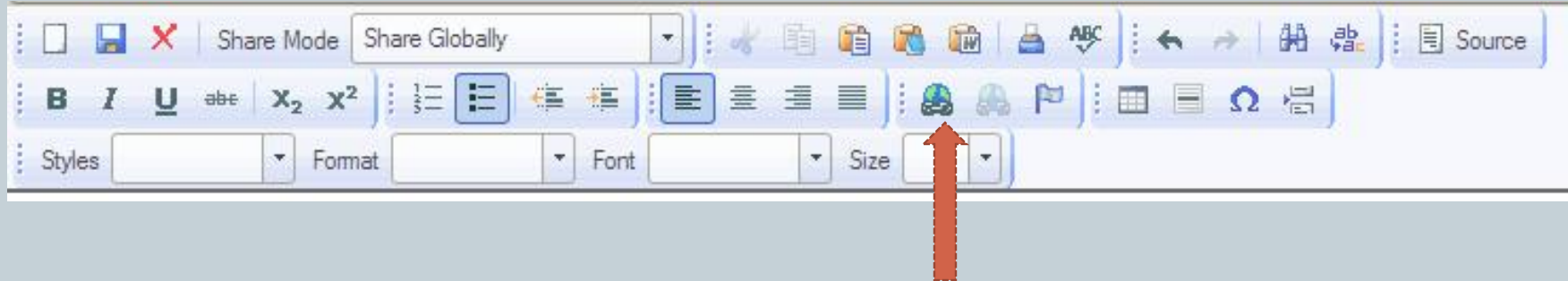
# The Text Editor



Change the pull down to “Share Globally” if you want others to see what you’ve done

- This can be changed later in your profile

# The Icons



- Links to RDA instructions (which you must know in advance)
- Most remaining icons are standard to text editors or word processing programs

# Choosing the Resources

- Select: RDA Toolkit document
- Choose RDA or LC-PCC PS

The screenshot shows a 'Link' dialog box with two dropdown menus. The first menu, 'Link Type', has 'RDA Toolkit document' selected. The second menu, 'Document', has a list of options: 'RDA', 'RDA: Element Set', 'JSC Maps', 'ERD', 'AACR2', and 'LC-PCC PS'. The 'RDA' option is highlighted. Three red arrows point from the text on the left to these specific options: the first arrow points to 'RDA Toolkit document', the second arrow points to 'RDA', and the third arrow points to 'LC-PCC PS'.

Link

Link Type

RDA Toolkit document

Document

RDA

RDA: Element Set

JSC Maps

ERD

AACR2

LC-PCC PS

# Navigating the Selections

- Choosing the Section opens a new pull down menu

- Select the specific instruction needed

Click the OK button to insert it

Link

Link Type  
RDA Toolkit document ▼

Document  
RDA ▼

2: Identifying Manifestations and Items

Heading

2.1.2.4 Integrating Resource

2.0 Purpose and Scope

2.1 Basis for Identification of the Resource

2.1.1 General Guidelines

2.1.2 Comprehensive Description

2.1.2.1 General Guidelines

2.1.2.2 Resource Issued as a Single Unit

2.1.2.3 Resource Issued in More Than One Part

2.1.2.4 Integrating Resource

# Editing Workflows



- Can only alter Workflows that you created
  - Change the name (Metadata)
  - Change who can view it (Change Sharing Mode)
  - Edit
  - Delete
- Locate the Workflow You Created Under Your Profile  
click the edit icon next to the workflow

– My Workflows

USG Monographs (General)



- Edit, save as before, and your done