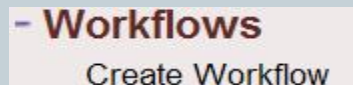# Workflows

RESOURCE DESCRIPTION AND ACCESS: A COBEC WORKSHOP PRECONFERENCE
FEBRUARY 4, 2014

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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**

  - Workflows
    Create Workflow

- Once named, Workflow can be saved continuously
  - Will appear in the Global Workflows section of the Tools tab

  RDA   TOOLS   RESOURCES

Starting Template
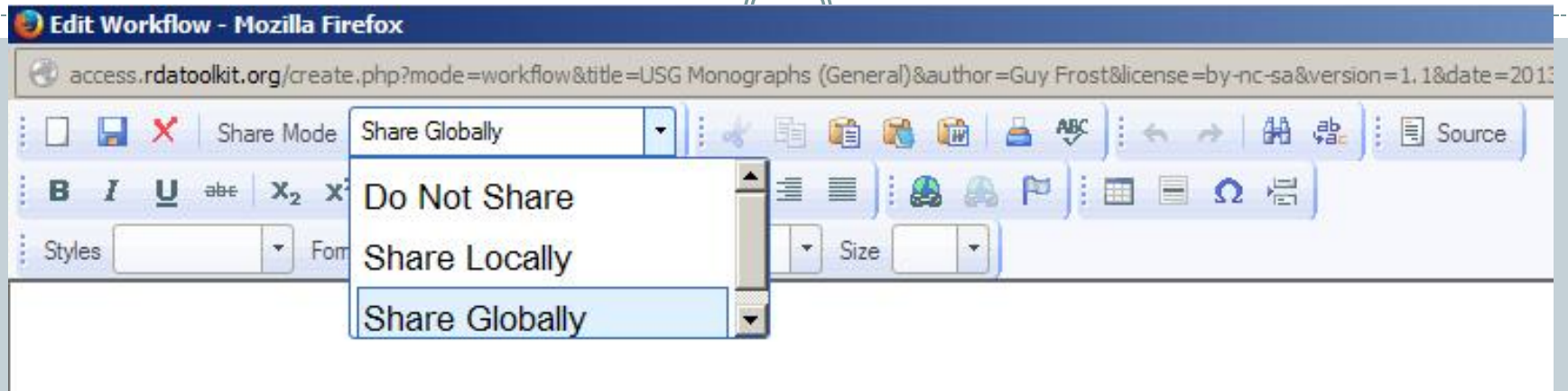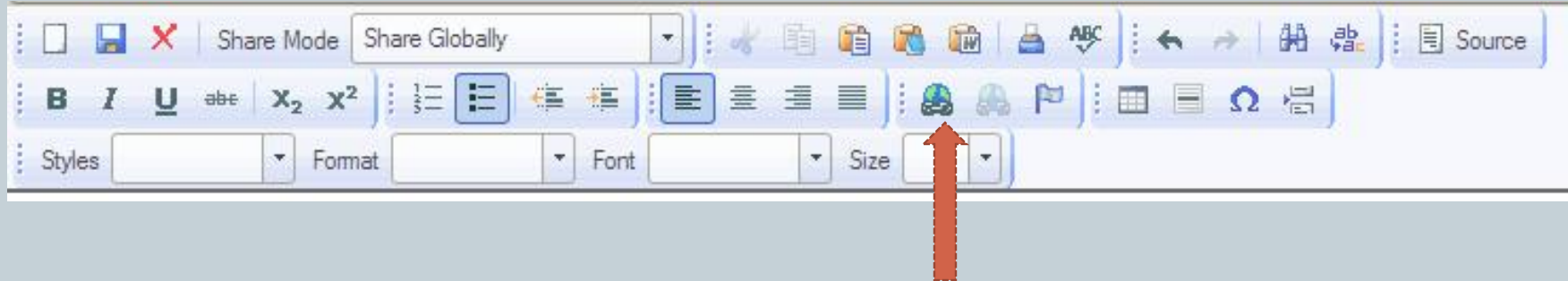
The Text Editor

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

Link

Link Type
RDA Toolkit document

Document
RDA

RDA
RDA: Element Set
JSC Maps
ERD
AACR2
LC-PCC PS

Navigating the Selections

- Choosing the Section opens a new pull down menu

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

- Select the specific instruction needed

Click the OK button to insert it

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

- Edit, save as before, and your done