NAVIGATING THE RDA TOOLKIT

RESOURCE DESCRIPTION AND ACCESS:
A COBEC WORKSHOP
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Types of Subscriptions

- Site
  - Unlimited Registered Users
  - Can Share Workflows Site-wide and to Public
- Solo-User
- Training and Classroom
- Consortia and Group (this is what the University System of Georgia has)
  - Can contain Site and Solo Subscriptions

Accessing The Toolkit

- http://www.rdatoolkit.org/

- IP, URL Authentication, Username/Password

  username: 2014rdatraining
  password: rda2014

Logging In

- **Login with Username and Password Provided by ALA**

  login

  ○ Institution name will appear at the top right

  ○ Notice it now asks for Profile Name and Password

Creating the User Profile

- **Why Create a Profile?**
  - Save Searches
  - Bookmarks
  - Workflows
  - Maps
- **Click on the Create Profile Icon**

Filling in the Blanks

Your User Profile is currently inactive.

If you have a profile:
Enter your profile name and password and click Login.

Enter Profile Name... | Enter Password... | **Login**

Or you may create a new profile:
Enter your desired account details and click Create.

Full Name: | | **Create**
Profile Name: |
Email Address: |
Password: |
Confirm Password: |

☐ I agree to the RDA Toolkit terms and conditions.

Forgot your password? Click Here to send yourself an email reminder.

- **No requirements mandated for Password**
  - Can use capitals, numbers, etc.

Not Quite Done

- Managing Your Profile
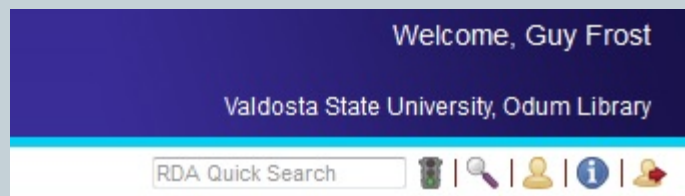
- Allows you to completely revise what you just did

Toolkit Settings

Toolkit Settings

These settings customize the behavior of the RDA Toolkit when you login with your profile.

Language: Browser Default ▾   **Update**

Split Documents By Page: ☑

Automatically Synchronize TOC: ☑

Hide Examples: ☐

Display the selected link sets in...

RDA: ☑ LC-PCC PS

AACR2: ☑ CM ☑ DCRMB ☑ LCRI ☑ MARC ☑ LAC RI

LC-PCC PS = Library of Congress and the Program for Cooperative Cataloging Policy Statements (Replaced LCRI)

CM = CONSER manual

DCRMB = Descriptive Cataloging of Rare Materials (Books)

LCRI = Library of Congress Rule Interpretations

MARC = Machine Readable Cataloging

LAC RI = Canadian Rule Interpretations

User Menu

Welcome, Guy Frost

Valdosta State University, Odum Library

RDA Quick Search
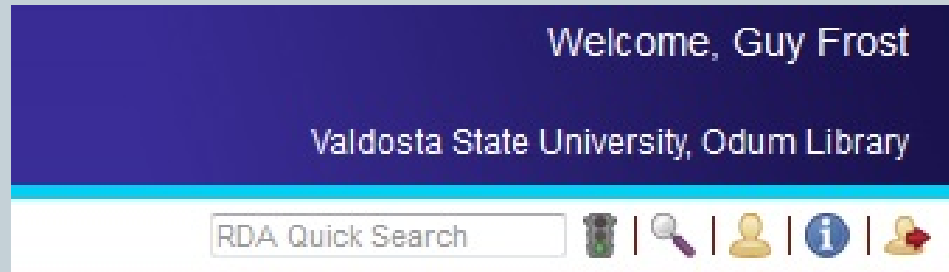
Go button   **logout**

Advanced Search

Support

Tabs in the Left Pane

RDA | **TOOLS** | **RESOURCES**

- RDA TOC ; RDA Browse Tree
- Tools:
  - RDA: Element Set ; RDA Mappings ; RDA Examples ; Workflows ; Maps ; Entity Relationship Diagram (ERD) ; Schemas
- Resources
  - AACR2 ; LC-PCC PS ; Other

Browsing

- **Navigating Through RDA using the "Browse Tree"**
  - Use + and - signs to expand and collapse Sections and Chapters
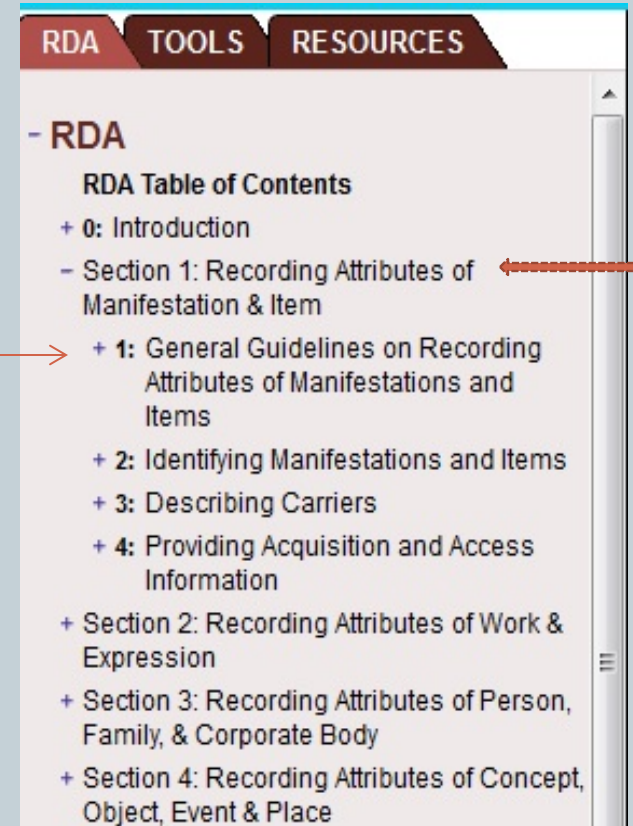
WEMI

- Note in the previous slide how chapters are divided:
  - Manifestations and Items together (Tangible characteristics)
  - Works and Expressions Together (Abstract characteristics)

This consists of the Group 1 entities outlined in FRBR

FISO

- The FRBR concept of Find, Identify, Select, Obtain
- In RDA, chapters dealing with: Persons, Families, and Corporate Bodies
  - Covers the first two components: Find and Identify
    - Core requirements for AAP (Authorized Access Point)
    - How aspects of the entity in the APP are recorded (Spacing of initials, abbreviations, etc.)

This consists of Group 2 entities outlined in FRBR

Exercise

Scenario: Two resources by the same author. One uses accent marks in the name, one does not. There is no AAP in the authority file.

How should you record the name (i.e., with or without diacritic marks) in the 100 field?

FRSAD

- Functional Requirements for Subject Authority Data
  - In RDA, chapters dealing with: Concept, Object, Event, Place
  - Yet to be developed for RDA

  This consists of Group 3 entities outlined in FRBR

Exercise

Scenario: *Title page has <u>Second edition</u>; Spine has 2nd edition; CIP has <u>2nd ed.</u>*

- Using the ***Browse Tree*** on the Left Pane
  - Locate the Section for Editions

  Question:

  What is the **Preferred Source** for Transcribing the Edition Statement?

Table of Contents

- The <u>Table of Contents</u> mirrors that of the print Resource

RDA TABLE OF CONTENTS

0: Introduction RDA

    0.0: Purpose and Scope RDA

    0.1: Key Features RDA

    0.2: Relationship to Other Standards for Resource Description and Access RDA

    0.3: Conceptual Models Underlying RDA RDA

    0.4: Objectives and Principles Governing Resource Description and Access RDA

    0.5: Structure RDA

    0.6: Core Elements RDA

Allow for quick Navigation to Desired Content

Navigating The Pages

- Content may be broken up into Pages

[1] 2 3 4 5 6 7 8 9 10 11 12

- Can select any of these to view
- The green arrow allows to go back to the previous page
- If desired, can be turned off by editing you Profile

Synching the Table of Contents

- Helps users know where they are in the Toolkit
  - Bold in the left pane browse area

    + 6.8 Identifier for the Work
    + 6.9 **Content Type**
    + 6.10 Date of Expression

  - Only synchs to clicked links, either in the text or via the Browse pane
    - If scrolling and it is desired to synch to the instruction number further down the page; use the manual **Synch TOC** button
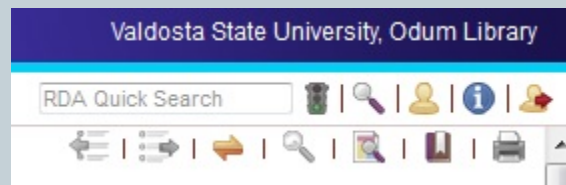
Quick Searching

- ## Searching for specific instruction numbers
  - Type the instruction number and click on the **Go** icon
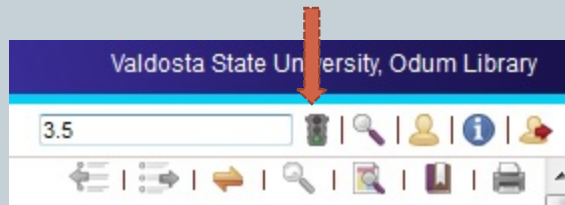
  - Use quotation marks around the instruction number to generate a *results list*
    - Shows related instructions
    - Provides cross references to other instructions when found within the text
    - Includes false hits

Results List

- Provides the body of related instructions (e.g., 2.13 Mode of issuance)   Basic Instructions

RDA: 2.13 Mode of Issuance

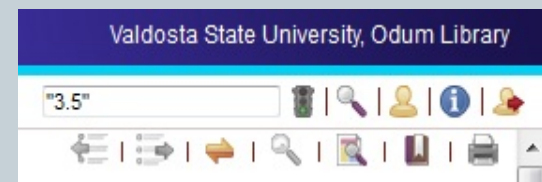RDA: 6.23.2.13 Parts of Buddhist Scriptures ☐ ⦿
   Record the preferred title for parts of Buddhist scriptures by applying these inst

RDA: 2.13.1 Basic Instructions on Recording Modes of Issuance

RDA: 2.3.2.13 Major and Minor Changes in the Title Proper of Serials ☐ ⦿
   Differentiate between major and minor changes in the title proper of a serial by

Core Instructions

Reordering of Results

- Results are retrieved by relevance first
- Document Order will allow base instructions to file in order

RDA Quick Search

Results 1 - 8 of 8 for "3.13" in **RDA** by Relevance

Click here for re Relevance

Document Order

Highlighting of the Text

- After selecting an instruction number, the original search is highlighted in yellow
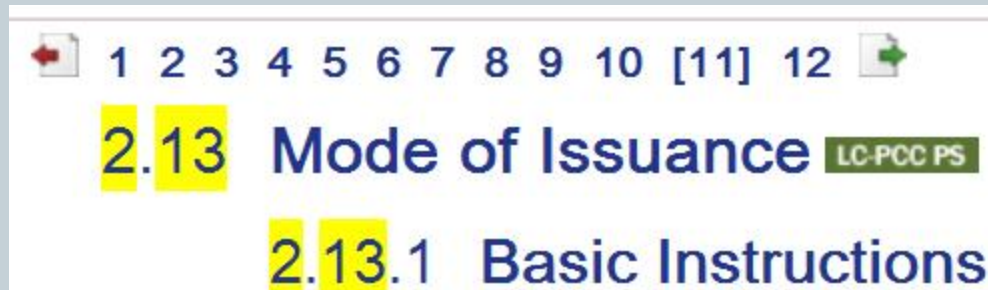
- Use the Return Icon to navigate back to your original results

Basic Searching

- Allows for Boolean AND, OR, and NOT as well as proximity searching w/#
- Default searching of multiple words is AND
- Truncation via *
- Searching not case sensitive
- Punctuation is ignored

Exercise

Repeat Diacritic search:

     - using truncation on the term diacritical

     - coming "name" for a Boolean search

Advanced Searching

- Good for navigation from known AACR2 rules to relevant RDA instructions

- Can exclude Content

- Save Searches for future reference

Exercise:

- Click LC-PCC PS and RDA

- Search for "Sign language" with quotes

Exercise

- Clear "Clear Previous Search"
- Search for AACR2 rule 8.7B18 (Contents Note)
  - Choose: Recording Relationships for Related Works
  - Click on the LC-PCC PS
  - Scroll to the top of this policy statement
    - Note the differences in practice between LC and the PCC

Searching by Content Type

- Clear previous search
- Using the pull down menu change the selection to Music only

RDA Instruction Types (RDA Only)

All Instruction Numbers	▾
All Description Types	▾
Music Only	▾

All Content Types
Cartographic Only
Movement Only
Moving Images Only
Music Only
Still Images Only
Tactile Only
Text Only
Three-Dimensional Forms Only

- As you search term, type in: notation

Saving this Search

- Click on the Advanced Search icon again
  - Previous search should be displayed
- At the bottom of the screen, name your search

- Find your s Save Search as ... r future use under your user profile
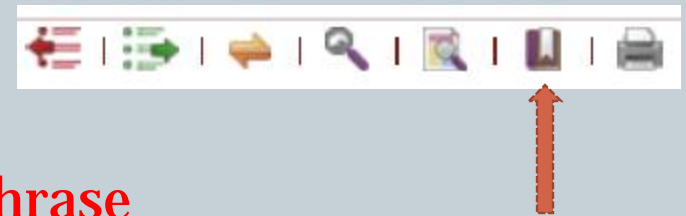
music notation

Saved Searches

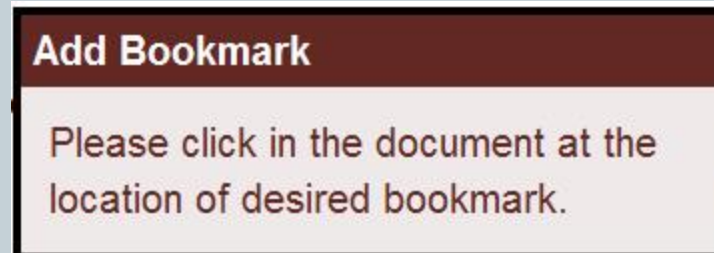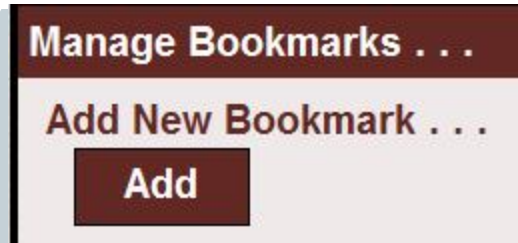1. music notation [Delete] [Rename] [Edit]

Bookmarking

- Used when you have specific instructions you want to easily retrieve again

- Example: Carrier type (338)
  - Search for Carrier type as a quoted phrase
  - A look at the first one, 3.3.1.3, reveals the target instruction
  - Click on the bookmark icon

Manage Bookmark Dialogue Box

- Click the Add button:
- Instructions pops up

indicating the need to select where you want the bookmark to start

Manage Bookmarks . . .
Add New Bookmark . . .
Add

Add Bookmark

Please click in the document at the location of desired bookmark.

click anywhere on the instruction number

Final Add Dialogue Box

- A New Dialogue Appears
  - Add name; optionally add annotation

Add Bookmark

Bookmark Name

Carrier Type

Bookmark Annotation

338;__; $a volume $2 rdacarrier

Cancel   Set

Click on "Set" when ready

Where are My Bookmarks?

- Icon appears next to Instruction number

3.3.1.3 Recording Carrier Type

Record the carrier type using on

- Listed in Personal Profile

Bookmarks

1. Carrier Type [Delete]

Core Elements and Optional Omissions

2.3 **Title**

CORE ELEMENT

The title proper is a core element. Other titles are optional.

- Core Elements are clearly labeled in light blue text

Optional Omission LC-PCC PS

Abridge a statement of responsibility only if this can be done without loss of essential information. Do not use a mark of omission (…) to indicate such an omission. Always record the first name appearing in the statement. When omitting names from a statement of responsibility naming more than one person, etc., apply the instructions at 2.4.1.5 RDA.

Helpful Embedded Links

- Links to the Glossary

7.15.1.1 Scope

Illustrative content▾

    Use Browser back button to return to original spot

- Links to LC-PCC PS

7.16.1.3 Recording Supplementary Content LC-PCC PS

    Click on to the RDA Browse Tree to return to the instructions

- Links to related RDA instructions (references)

1.8.1   General Guidelines

When recording numbers expressed as numerals or words

form of numerals (see 1.8.2 RDA)

Examples

7.24.1.3 Recording Artistic and/or Technical Credits

Record the names of persons, families, or corporate bodies who hav[e]
the artistic and/or technical production of a resource if considered im[portant for]
identification, access, or selection.

Include a statement of function with each name or group of names.

EXAMPLE
`2012/04`

Producer, Richard Mohr; recording engineer, Lewis Layton

Here also shows date of revision

Note: examples do not included preceding or ending punctuation

Alternatives, Additions and Exceptions

Numbering within subseries

Alternative `LC-PCC PS`

If an element in this list cannot be recorded in the script used on the source from wl
the element in a transliterated form.

Optional Addition `LC-PCC PS`

Record an element listed at **1.4** `RDA` in a transliterated form in addition to the form
used on the source.

Record all other elements (including notes) in a language and script, or languages and scrip
agency creating the data.

Exception

Names, titles, or quotations in notes. Record a name, title, or quotation incorporate
language and script in which it appears on the source from which it is taken.

Alternative

Record a name, title, or quotation incorporated into a note in a transliterated form.

Other Content in the Toolkit

- AACR2
- Library of Congress Program for Cooperative Cataloging Policy Statements (LC-PCC PS)
- Workflows and other documentations created by other subscribers
- Mappings to other schemas
  - MARC21

AACR2

1.1B. Title Proper `MARC`

1.1B1. `RDA` `CM` `DCRMB` `DCRMB` `DCRMB` `DCRMB` `DCRMB` `LCRI` Transcribe
order, and spelling, but not necessarily as to punctuation and capitalization
diacritical marks that are present in the chief source of information (see als
the title proper of a serial or an integrating resource in any area except the
Capitalize according to appendix A `AACR2`.

Allows for the navigation to a myriad of standards (Caveat: in Catalogers Desktop)
- MARC
- RDA
- CM (CONSER Manual)
- DCRMB (Descriptive Cataloging of Rare Materials (Books)
- LCRI

RDA MAPPINGS

- RDA TO MARC Bibliographic Mappings
  - Allows a quick link from the RDA instructions to MARC21
- MARC Bibliographic to RDA Mappings
  - Quick links from MARC fields to RDA
- RDA to MARC and MARC to RDA Authorities
- RDA to MODS (Metadata Object Description Schema) (an XML schema)

Exercise

- You are cataloging a dictionary of sign language chiefly made up of images with added text defining sign

  - RDA wants you to record the language note (i.e., form of sign language) as part of the Accessibility Content

    1. Locate the instructions for Accessibility Content
    2. Read the LC-PCC PS for these instructions
    3. Use the **RDA to MARC** Mapping under Tools and navigate to examples in the MARC field
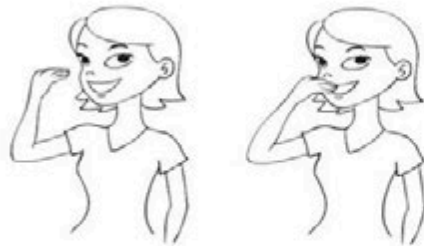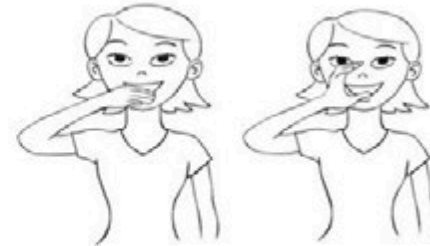
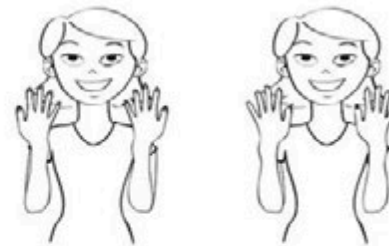# Example:

Image source: BabySignLanguage.com