RDA BASICS TO GET YOU STARTED

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Resource Description and Access (RDA), first implemented in 2013, introduced several changes to descriptive cataloging guidelines. Whereas many libraries were early adopters of RDA, there are still libraries who have not yet adopted RDA or have not adopted it fully. If your library has not yet adopted RDA, or if your library has adopted RDA, but you are feeling overwhelmed with the task of keeping up with the changes to RDA, this presentation will help bring you up-to-date. The presenters will cover changes to several fields, including main entry, title and statement of responsibility, publication information, physical description, and the new 33X fields. In addition, presenters will suggest some beneficial freely available resources to aid in understanding and accessing RDA. An overview of recent changes to RDA, MARC, and BIBFRAME will also be discussed.
STANDARDS IN THE UNITED STATES

- Anglo-American Cataloging Rules (AACR2)
- Resource Description and Access (RDA)
  - Library of Congress/Program for Cooperative Cataloging Policy Statements
  - LC PCC PS (sometimes expresses the practice of LC or PCC)
- Communities
  - PCC: BIBCO, CONSER, NACO (e.g., Provider neutral guidelines, CSR)
  - Music: Music Library Association (MLA) and MOUG (Music OCLC Users Group)
  - Map and Geospatial Information Round Table (MAGIRT) (ALA)
  - Online Audiovisual Catalogers (OLAC)
  - Descriptive Cataloging of Rare Materials (DCRM)
  - Describing Archives: A Content Standard (DACS)
  - Cataloging Cultural Objects (CCO)
- And more
RDA BETA - STATUS

- Complete rewrite of RDA
  - Began April 2017
  - 3R project (RDA Toolkit Restructure and Redesign Project)
  - Implement the Library Reference Model that replaced FRBR, FRAD, FRSAD

- **English language version stabilized, April 2019**

- Next
  - Translations into other languages
  - Policy statements
  - Application profiles

- Release of RDA Beta is expected in early 2020

Source: Getting a handle on the new RDA Toolkit
- **Group 1**
  - Work
  - Expression
  - Manifestation
  - Item

- **Group 2**
  - Person
  - Family
  - Corporate Body

- **Group 3**
  - [Subjects]

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**Library Reference Model (LRM)**

- Res
  - Work
  - Expression
  - Manifestation
  - Item
  - Agent
    - Person
    - Collective Agent
  - Nomen
  - Place
  - Time-span

*Res is called RDA Entity in RDA*
RDA BETA — THE SAME OR SIMILAR

- Kept existing instructions whenever possible
  - Minimal impact on current practice

Source: Getting a handle on the new RDA Toolkit
RDA BETA — NEW CONCEPTS

- Appellation elements
- Data provenance – source of metadata
- Diachronic works – issued over time
- Aggregates
  - Collection aggregates
  - Augmentation aggregate
  - Parallel aggregate
- Representative expression
- Manifestation statements
  - How the resource represents itself

Source: Getting a handle on the new RDA Toolkit
BASICS ...
RDA 1.2 PRINCIPLES (SELECTED)

- Representation: The data should reflect the manifestation’s representation of itself.
  - Transcription - Take what you see
  - Don’t abbreviate
  - Don’t abridge

- Common usage: Data that is not transcribed from the manifestation itself should reflect common usage.
RDA 1.4 TRANSCRIPTION GUIDELINES

- These elements should be recorded in the language and script on the resource, if possible
  - Title and Statement of Responsibility
  - Edition
  - Production, Publication, Distribution, Manufacture statements
  - Series statement
RDA 1.7 TRANSCRIPTION

- Capitalization (1.7.2)
- Punctuation (1.7.3)
- Diacritical marks (1.7.4)
- Spacing of initials and acronyms (1.7.6)
- Abbreviations (1.7.8)
- Inaccuracies (1.7.9)
- **Capitalization (1.7.2)**
  - Capitalize according to guidelines of the language
    - Use sentence case - normalized transcription (Appendix A)

- LC PCC PS: Encouraged to use Appendix A, though it is permitted to take what you see
Punctuation (1.7.3)
- Transcribe punctuation as it appears on the piece (within data elements)
  - 245 10 ...and then there were none
  - 245 10 What is it?...what is it not?
- For clarity, add, omit, and/or change punctuation

New PCC Policy regarding terminal punctuation
- Beginning April 2019, PCC libraries may omit terminal periods in descriptive fields, unless they follow abbreviations, etc.

- 245, 250, 300, 500 and other note fields, 740
- Already not added to 246, 490, and other fields

- 500 __ Includes index
- **Diacritical marks (1.7.4)**
  - Transcribe as on piece
  - Option: If a diacritical mark is not present, add it if used in the language of the data

- **Symbols (1.7.5)**
  - Replace symbols and other characters that cannot be reproduced with a description of the symbol
    - 245 10 From [alpha] to [beta]
  - If that hinders clarity, omit or replace it with another symbol or sign of punctuation
    - Make a note
  - LC PCC PS:
    - Don’t spend undue time and effort
- **Spacing of initials and acronyms (1.7.6)**
  - Transcribe without space, even if there are full stops

- **Abbreviations (1.7.8)**
  - Few are used. Follow Appendix B
  - In general, the only abbreviations we use are with units of measure
    - 3 in.
    - 20 fps

- **Inaccuracies (1.7.9)**
  - Transcribe the inaccuracy or misspelled word unless a specific instructions indicates otherwise
  - Make a note if important
  - 245 10    Considering the **impct** of rain
  - 246 1_   $i$ Corrected title: $a$ Considering the **impact** of rain
  - Not: 245 10    Considering the impct [i.e. impact] of rain
RDA 1.7 TRANSCRIPTION

Option:

- Accept without modification:
  - Accepting description from another agency
  - Data is from automated scanning, copying, or downloading
  - PCC: generally accept data from digital sources; make adjustments as judged appropriate
PREFERRED SOURCE OF INFORMATION: BOOKS, ETC.

One or more pages, leaves, sheets, or cards (RDA 2.2.2.2)

- Use title page, title sheet, or title card
- If not title page
  - Cover or jacket
  - Caption
  - Masthead
  - Colophon
PREFERRED SOURCE OF INFORMATION: MOVING IMAGES

- Moving images (RDA 2.2.2.3)
  - Title frame or frames or title screen or screens
  - As needed, another source for a collective title
  - If no title frames or title screens:
    - Label on the manifestation (e.g., disc)
    - Container or accompanying information
    - Internal source of the resource (e.g., disc menu)
    - Another source that is part of the manifestation
2.2.4 OTHER SOURCES OF INFORMATION

If information needed to identify the manifestation is not part of the manifestation, use these sources:

▪ Accompanying material that is not treated as part of the manifestation
▪ Published description
▪ Container not issued with the manifestation
▪ Any other available source

This list is referred to from many parts of RDA.
BRACKETS

Brackets indicate that transcribed information is from outside source

- LC PCC PS: Use square brackets if information is taken from an outside resource for a field that uses transcribed information. Bracket each data element.
  - [Kansas City, Kansas] : [distributed by Distribution Company, Inc.]

- Do not include brackets if the resource is a type that does not normally carry identifying information (photograph, collection, etc.)
  - Add a note to indicate source.
040 CATALOGING SOURCE

$a Original cataloging agency

$b Language of cataloging (not the language of the item you are cataloging)
   ▪ Must be supplied for all new bibliographic records, including derived records
   ▪ Connexion client, Connexion browser and Record Manager users can either add the subfield to each new record you create or add $b to your Constant Data record so it is provided on all new records you create. If you are cataloging within the United States, it is most likely that your cataloging language is English, so you will use the “eng” code. If you are cataloging in a different language, use the Library of Congress code list for Languages to determine the code to use.

$e Description conventions ($e rda)

$c Transcribing agency

$d Modifying agency

The preferred order of 040 subfields is:

   040 __ $a MUU $b eng $e rda $c MUU $d OCLCQ

▪ This order puts key identifiers of language (b) and cataloging code (e) closer to the beginning of the 040 string for easy identification by other catalogers.
RDA 2.3 TITLES

- Transcribe all titles (except some variant titles)
- Transcribe errors (RDA 1.7.9)
  - Except:
    Do not transcribe errors in the Title Proper for serials and integrating resources
- **Title proper (245 $a)**
  - Core
  - In general, do not abridge a title proper (LC PCC PS)
  - No title proper
    - Take from another source
    - Devise a title – in English (LC PCC PS)

- **Other title information (245 $b)**
  - Core for monographs (LC PCC PS)
  - Subtitles, etc.
- **Parallel titles**
  - A title in another language or script
  - Core (LC PCC PS)
  - Take from any source in the resource
  - Monographs – 245
    - 245 03 Le Bureau = $b La Oficina = Das Büro
  - Serials – 246

- **Variant title (246)**
  - Not core
  - Record if important for identification of access
  - Take from any source
    - 246 14 Commercial gardens
EXAMPLE — USE OF $i$

Use $i$ field instead of a separate note

- **246 1_ $i Title also in French:** $a$ Prix agricoles. $p$ Séries sélectionnées de la banque de données CRONOS

- **246 1_ $i Title also in German, <1988>-1989:** $a$ Agrarpreise. $p$ Ausgewählte Reihen aus der CRONOS-Datenbank

- **246 1_ $i Title also in Italian, <1988>-1989:** $a$ Prezzi agricoli. $p$ Serie selezionate dalla banca dati CRONOS
“AACR2’s ‘rule of three’ stipulated that if there were more than three authors for any resource, only the first would be noted in the 245 field, followed by [et al.], and that the title would become the authorized access point (i.e., there would be no 1xx field).

RDA: All authors [and others] are listed in the 245 field, and the author with primary responsibility (or the first-named author) goes in the 1xx field, with additional authors in the 7xx field” (RDA Basics, 2012).

From Copy cataloging using RDA
RDA 2.4 STATEMENT OF RESPONSIBILITY (245 $C)

- Core: First statement of responsibility
- Transcribe it as it appears
- Generally, do not abridge; generally do not omit names (LC PCC PS)
- Optional omission: if a single statement of responsibility has more than three agents, omit all but the first; summarize what has been omitted
  - [and five others]
EXAMPLES

- 245 10 Hilma af Klint : $b notes and methods / $c introduction and commentary by Iris Muller-Westerman ; afterward by Johan af Klint ; edited by Christine Burgin ; translations by Kerstin Lind Bonnier, Elizabeth, Anne Posten.

- 245 00 Charles White : $b a retrospective / $c edited by Sarah Kelly Oehler and Esther Adler ; with essays by Esther Adler [and five others] ; and a preface by Kerry James Marshall.
STATEMENT OF RESPONSIBILITY — EXAMPLE WITH AFFILIATIONS

by Louis Henkin (University Professor Emeritus and Special Service Professor, Columbia University), Gerald L. Neuman (Herbert Wechsler Professor of Federal Jurisprudence, Columbia Law School), Diane F. Orentlicher (Professor of Law, Washington College of Law, American University), David W. Leebron (Dean and Lucy G. Moses Professor of Law, Columbia Law School)

Statement of responsibility appears on the source of information with each name, academic title, and affiliation on a separate line. Commas and parentheses added for clarity

RDA 1.7.3
RDA 2.5 EDITION STATEMENT (MARC 250)

- Core: Designation of edition
- Transcribe as on the piece, including abbreviations

- Optional addition: If a manifestation lacks an edition statement but contains significant changes from other editions, supply an edition statement if important for identification or access. Include brackets.
EXAMPLES

- 250 __ Fourth edition
- 500 __ Revision of the third edition (W.S. Hein, 2014)

- 250 __ Eighth edition in English

- 250 __ [May 2016 edition]
MARC 251 COMING SOON

- 251 – Version information
- Information relating to the version of a resource, preferably taken from a controlled vocabulary.

- 251 __ $a Author's original
- 251 __ $a Draft
- 251 __ $a Preprint

https://www.loc.gov/marc/bibliographic/bd251.html
MARC 264 replaced 260

Separate elements for each of these

264_0 Production: core if unpublished

264_1 Publication: core if published

264_2 Distribution: core if corresponding publication information is not available

264_3 Manufacture: core if corresponding publication or distribution information is not available

264_4 Copyright: core if date of publication or distribution is not available
RDA 2.7 PRODUCTION STATEMENT (MARC 264 _0)

- Date of production is core if manifestation is unpublished (manuscript, painting, etc.)
- Other elements are optional
RDA 2.8 PUBLICATION STATEMENT (MARC 264 _2)

- Core: If more than one place or publisher, only the first is core
- Transcribe

- Record changes in additional 264 fields (LC PCC PS)
  - Add notes (500) when numerous or RDA-compliant transcriptions cannot be made
RDA 2.8.2 PLACE OF PUBLICATION (RDA 264 _1 $A)

- Optionally include larger jurisdiction in brackets
- Do not need to include a place in the United States (LC PCC PS)
- If no place is given, supply a probably place if it can be determined

Examples
- Fulton, [Missouri]
- [United States]
- [Denver, Colorado?]
- Toronto ; $a Kansas City, Mo.
- [Place of publication not identified]
RDA 2.8.4 PUBLISHER’S NAME (MARC 264 _1 $B)

- Transcribe
  - Do not omit levels of hierarchy in a corporate hierarchy (LC PCC PS)

- $b University of Iowa, Audiovisual Center, University Video Center
- $b Bethany House, A division of Baker Publisher Group
- $b [publisher not identified]
RDA 2.8.6 DATE OF PUBLICATION (MARC 264 __1 $C)

- Transcribe
- Supply a date whenever possible

On piece
1975
May 2000
4308 [1975]
1984-

Supply date if possible
[2008]
[2008?]  
[between 1972 and 2008]
[not after 2008]
[date of publication not identified]
EXAMPLE: PUBLISHER CHANGES AND $3

- 264 _1 $3 1982-1989 : $a New York : $b Bowker
- 264 21 $3 2001 : $a Westport, Conn. : $b Bowker-Greenwood
- 264 21 $3 2006 : $a Westport, Conn. : $b Libraries Unlimited
- 264 21 $3 2010 : $a Santa Barbara, Calif. : $b Libraries Unlimited
- 264 31 $3 2014- : $a Santa Barbara, Calif. : $b ABC-CLIO, LLC
Examples — Core information lacking; move to next 264

- 264 _1 Beirut, Lebanon : $b [publisher not identified], $c 2015.
- 264 _1 [Sri Lanka] : $b [publisher not identified], $c 2015.
- 264 _2 Moratuwa, Sri Lanka : $b Distributed by Deepa Centre for Community Development and Peace-Building
- 264 _1 [Russia?] : $b [publisher not identified], $c [2015?]
RDA CHAPTER 3 DESCRIBING CARRIERS

Under RDA, no abbreviations (except those in Appendix B, e.g. in., min., hr.) or square brackets.

AACR2


RDA

300__ $a 250 pages, 15 unnumbered pages : $b color illustrations ; $c 25 cm

300__ $a 1 videodisc (approximately 66 min.) : $b sound, chiefly black and white ; $c 4 \frac{3}{4} \text{ in.}
RDA CHAPTER 3 DESCRIBING CARRIERS

300 field may be repeated

AACR2

300 __ $a xi, 819 pages : $b illustrations ; $c 29 cm + $e 1 DVD (4 3/4 in.)

RDA

300__ $a xi, 819 pages : $b illustrations ; $c 29 cm
300__ $a 1 DVD : $b color ; $c 4 ¾ in.
RDA 3.4 EXTENT (MARC 300 $a)  
CORE ELEMENT (IF COMPLETE OR TOTAL EXTENT KNOWN)

Use the list of carrier types at RDA 3.3.1.3 for naming units (e.g. audiocassette, online resource, filmstrip, videocassette).

$300 __ $a 1 computer disc (not computer disk)

Alternative at LC-PCC PS 3.4.1.3:
Catalogers may use a term in common usage
$300 __ $a 1 CD
RDA 3.4 EXTENT (MARC 300 $a)
CORE ELEMENT (IF COMPLETE OR TOTAL EXTENT KNOWN)

RDA 3.4.5.3 Single volumes with unnumbered pages, leaves, or columns
LC-PCC PS: Prefer: 1 volume (unpaged)

RDA 3.4.5.8 Complicated or irregular paging, etc.
LC-PCC PS: Prefer 1 volume (various pagings)
RDA 7.15 ILLUSTRATIVE CONTENT (MARC 300 $b)

7.15.1.3

Record an illustrative content if considered important for identification or selection.

Illustrative content is LC core for children’s material.

300__ $a 29 pages : $b illustrations (chiefly color) ; $c 27 cm.
RDA 3.5 DIMENSIONS (MARC 300 $c$)

300__ $a$ xi, 819 pages : $b$ illustrations ; $c$ 29 cm

300__ $a$ 1 DVD : $b$ color ; $c$ 4 ¾ in.

LC-PCC PS: Core except for serials and online resources

$300__ $a$ 5 volumes

$300__ $a$ 1 online resource (139 pages) : $b$ illustrations
If followed by a series field, then ISBD punctuation requires a period at end of 300 $c.

300 __ $a 250 pages : $b color illustrations ; $c 22 cm.

490 1 _ $a Library and information science text series ; $v 15
Beginning April 8, 2019, PCC libraries will have two options regarding inclusion of terminal periods when newly authenticating bibliographic records:

a. Continue current practice (fully punctuated); code Leader/18=i

b. Omit terminal period in any descriptive field; code Leader/18=i

Exception: terminal periods integral to the data (e.g., recorded as part of abbreviations, initials, etc.) should not be omitted.

300 ## $a 1 sound disc (56 min.) : $b digital, stereo ; $c 4 3/4 in. [abbreviation for inch]
  ▪ Terminal periods in access point fields (e.g. 1xx, 6xx, 7xx, 8xx) will continue to be required.
  ▪ 300 Physical Description: terminal period may be omitted even if 490 field is present

300 __ $a 250 pages : $b color illustrations ; $c 22 cm

490 1_ $a Library and information science text series ; $v 15

From: Guidelines for Implementing New PCC Policy Regarding Terminal Periods in MARC Bibliographic Records
The General Material Designator (GMD) 245 $h has been replaced with three new elements: MARC 336--Content Type (RDA core) MARC 337--Media Type (LC/PCC core) MARC 338--Carrier Type (RDA core)

April 2016: OCLC began removing GMDs

- Can add GMDs to local records
Form of communication through which the content is expressed (performed music, cartographic image, or spoken word?)

RDA 6.9 has guidelines for recording content type including a closed vocabulary list.

LC Term and Code List for RDA Content Types

Term and Code List for RDA Content Types

<table>
<thead>
<tr>
<th>RDA content term - 336 $a</th>
<th>MARC codes for RDA terms - 336 $b</th>
<th>MARC Bibliographic Leader/06 code(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>cartographic dataset</td>
<td>crd</td>
<td>e or f</td>
</tr>
<tr>
<td>cartographic image</td>
<td>cri</td>
<td>e or f</td>
</tr>
<tr>
<td>cartographic moving image</td>
<td>crm</td>
<td>e or f</td>
</tr>
<tr>
<td>cartographic tactile image</td>
<td>ctt</td>
<td>e or f</td>
</tr>
<tr>
<td>cartographic tactile three-dimensional form</td>
<td>crm</td>
<td>e or f</td>
</tr>
<tr>
<td>cartographic three-dimensional form</td>
<td>crf</td>
<td>e or f</td>
</tr>
<tr>
<td>computer dataset</td>
<td>cod</td>
<td>m</td>
</tr>
<tr>
<td>computer program</td>
<td>cop</td>
<td>m</td>
</tr>
</tbody>
</table>

https://www.loc.gov/standards/valuelist/rdacontent.html
Type of device (if any) needed to use the resource (audio player, video player, nothing?)

RDA 3.2 has guidelines for recording the media type

LC Term and Code List for RDA Media Types

https://www.loc.gov/standards/valuelist/rdamedia.html
RDA 3.3 CARRIER TYPE (MARC 338)

- Storage medium (audio disc, videocassette, online?)
- RDA 3.3 has guidelines for recording the media type
- LC Term and Code List for RDA Carrier Types

Term and Code List for RDA Carrier Types

<table>
<thead>
<tr>
<th>Audio carriers</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>RDA carrier terms - 338 $a</td>
<td>MARC codes for RDA terms - 338 $b</td>
<td>MARC audio carrier codes - 007/01</td>
</tr>
<tr>
<td>audio cartridge</td>
<td>sg</td>
<td>g - 007/01 (Sound recording)</td>
</tr>
<tr>
<td>audio cylinder</td>
<td>se</td>
<td>e - 007/01 (Sound recording)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Video carriers</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>RDA carrier terms - 338 Sa</td>
<td>MARC codes for RDA terms - 338 $b</td>
<td>MARC video carrier codes - 007/01</td>
</tr>
<tr>
<td>video cartridge</td>
<td>vc</td>
<td>c - 007/01 (Videorecording)</td>
</tr>
<tr>
<td>videocassette</td>
<td>vf</td>
<td>f - 007/01 (Videorecording)</td>
</tr>
</tbody>
</table>

[https://www.loc.gov/standards/valuelist/rdacarrier.html](https://www.loc.gov/standards/valuelist/rdacarrier.html)
AACR2

110 2_ $a ABBA (Musical group)
245 10 $a ABBA gold $h [sound recording] : $b greatest hits.
300 __ $a 2 sound discs : $b digital ; $c 4 3/4 in. + $e 1 videodisc (DVD, ca. 99 min. : sd., col. ; 4 3/4 in.)
500 __ $a Compact discs, with bonus DVD.

RDA

110 2_ $a ABBA (Musical group)
245 10 $a ABBA gold : $b greatest hits.
300 __ $a 2 audio discs : $b digital ; $c 4 3/4 in.
300 __ $a 1 DVD (approximately 99 min.) : $b sound, color ; $c 4 3/4 in.
336 __ $a performed music $b prm $2 rdacontent
337 __ $a audio $b s $2 rdamedia
338 __ $a audio disc $b sd $2 rdacarrier
336 __ $a two-dimensional moving image $b tdi $2 rdacontent
337 __ $a video $b v $2 rdamedia
338 __ $a videodisc $b vd $2 rdacarrier

Adapted from: Library of Congress. “Replacement of GMD elements; carrier description”
<table>
<thead>
<tr>
<th>006</th>
<th>007</th>
<th>040</th>
<th>019</th>
<th>020</th>
<th>020</th>
<th>020</th>
<th>020</th>
<th>043</th>
<th>050</th>
<th>080</th>
<th>082</th>
<th>040</th>
</tr>
</thead>
<tbody>
<tr>
<td>c b r i d u t e n a - t h u i u t u k u l a</td>
<td>GGVR $b$ eng $a$ pp $c$ GGVRL $d$ OCLCQ $f$ IAC $f$ OUP $f$ YDACP $f$ OCLCQ $f$ NTE $f$ ZMC $f$ BUF $f$ PLDH $f$ RYA $f$ U3W $f$ WYU</td>
<td>OCLC QUALITY CONTROL SECTION</td>
<td>809998748 $c$ 040126955 $e$ 1038517345</td>
<td>781412668780 $f$ 400 $q$ (electronic book)</td>
<td>1412980780 $f$ 400 $q$ (electronic book)</td>
<td>9781452218427 $f$ 400 $q$ (e-book)</td>
<td>9781412698786 $f$ 400 $q$ (cloth)</td>
<td>$u$ $z$ 1412987064 $f$ 400 $q$ (cloth)</td>
<td>HV9779 $d$ 363 2012eb</td>
<td>364.97303 $f$ 223</td>
<td>$b$</td>
<td>MOLS</td>
</tr>
</tbody>
</table>

The social history of crime and punishment in America: $b$ an encyclopedia / $c$ Wilbur R. Miller, editor.

Thousand Oska, Calif.: $b$ SAGE, $c$ ©2012.

1 online resource (5 volumes (xix, 2806 pages)): $b$ illustrations.
RDA 2.12 SERIES STATEMENT (490)

- Core: title proper, numbering, title proper of subseries, numbering of subseries
- ISSN of series is LC PCC core
- Transcribe; keep initial articles
- Sources (LC PCC PS):
  - Sources within the resource may use formal or informal statements (Preface: This is the second edition of this book.)
  - Sources outside the resource; use brackets
  - Use $3 if series applies only to some issues or parts
  - Record multiple series in multiple 490s
SERIES EXAMPLES

490 1_ CIHM/ICMH Digital series = CIHM/ICMH collection numérisée ; $v no. 93149

490 1_ American university studies. Series XIV, Education ; $v vol. 48
830 _0 American university studies. $n Series XIV, $p Education ; $v v. 48.

490 1_ $3 1986: $a ADF & G technical data report ; $v no. 223
490 1_ $3 1999-2002: $a Regional information report
NOTES - LC PCC CORE

- 500/588 - Note on title
- 588 - Note on issue, part, or iteration used as the basis for identification of the manifestation (RDA 2.17)
- 502 – Dissertation or thesis information (RDA 7.9)
- 520 – Summary – Core for fiction intended for children and archival materials (RDA 7.10)
- 521 - Intended audience - Core for resources intended for children (RDA 7.7)
Notes - LC PCC Core

- 504/500 – Bibliographies and indexes – Core for monographs (RDA 7.16.1)
- 546 (FF, 041) - Language of content (RDA 7.12)
- 505 – Table of contents – Core for compilations (RDA 25.1)
  - Do not add if burdensome (PCC)
  - Generally not needed for poetry, hymnals, conference proceedings, serials, collections of interviews or letters, and similar resources
**RDA 2.17.13 SOURCE OF DESCRIPTION NOTE (MARC 588)**

- Used to describe and record the source of the cataloging information
- Core element for LC/PCC
- Required for everything except print monographs
- Can be used to record notes of interest to other catalogers

588 __ $a Cannot determine the relationship to Bowling illustrated, also published in New York, 1952-58. $5 DLC

- **Provider Neutral E-Resource guidelines** specify that if the electronic version is based on a physical version, format the 588 as:
  - “Description based on [physical format] version record”
    - Use in combination with a 776 field to express the relationship between the two versions

For online resources, make a note identifying the date on which the resource was viewed.

588 __ Description based on version viewed August 30, 2013; title from home screen.
Online monograph based on physical format (not in hand):
588 _ $a Description based on print version record.

Monograph online resource:
588 _ $a Description based on online resource; title from PDF title page (ACM, viewed May 24, 2019).

Serial online resource:
588 _ $a Description based on: Volume 16, issue 1 (2012); title from journal home page (ACS website, viewed May 19, 2012).

Indicator values (“0”) meaning “source of description” and (“1”) meaning “latest issue consulted” can be used to generate a display constant.

588 0 _ $a Description based on: Volume 1, number 1 (1999); title from cover.
RDA 2.15 IDENTIFIER FOR MANIFESTATION (02X: 020, 024) (CORE)

Most often will be an ISBN, but may also include other numbers.

- **LC PCC:**
  - For multiple identifiers, do not give a span; give each identifier
  - Add qualifiers in $q$

020 __ 9780226591933 $q$ (hardcover; $q$ alkaline paper)
020 __ 022659193x $q$ (hardcover; $q$ alkaline paper)
The two basic goals in the structure of RDA are to identify and relate.

WHY: Relationships are an important part of RDA. Expressing relationships in bibliographic and authority records helps users find what they want and tell users about other available resources. We show users the pathways to related materials. We need to reflect important relationships in our catalogs and resource discovery systems.

From Library of Congress (LC) RDA training materials, module 4
https://www.loc.gov/catworkshop/RDA%20training%20materials/LC%20RDA%20Training/Module%204_Relationships.ppt
TYPES OF RELATIONSHIPS AND DESIGNATORS

Relationships between:

1. Resources and associated persons, families, and corporate bodies
2. Resources (works, expressions, manifestations, items)
3. Persons, families, corporate bodies

- Relationship of the thing you are cataloging to an agent
  - Recorded in 1xx, 7xx
  - Related with $e
  - RDA Appendix I

- Relationship to other resources (e.g. reprints, other formats, translations, etc.)
  - Recorded in 76x-78x, and 5xx
  - Related with $i
  - RDA Appendix J
METHODS TO EXPRESS RELATIONSHIPS

1. Authorized access point, e.g.
   ▪ 110 2_ $a Society of Linguists, $e author.

2. Structured description, e.g.
   ▪ 776 08 $i Also issued as: $t Health statistics

3. Unstructured description, e.g.
   ▪ 500 __ $a Translation of the author’s novel Digital fortress.

From Library of Congress (LC) RDA training materials, module 4
https://www.loc.gov/catworkshop/RDA%20training%20materials/LC%20RDA%20Training/Module%204_Relationships.ppt
18.5.1.3: Record one or more appropriate terms from the list in Appendix I to indicate the specific function performed by the agent in relation to the work, expression, manifestation, or item.

LC-PCC PS for 18.5: Follow the PCC Training Manual for Applying Relationship Designators in Bibliographic Records.

Statement of policy: Include a relationship designator for all creators, whether they are coded MARC 1XX or MARC 7XX.

100 1_ $a White, Karen $q (Karen S.), $e author.
245 14 $a The forgotten room / $c Karen White, Beatriz William, Lauren Willig.
700 1_ $a Williams, Beatriz, $e author.
700 1_ $a Willig, Lauren, $e author.
RDA 18.5: RELATIONSHIP DESIGNATORS

(CREATORS AND CONTRIBUTORS)

- Using relationship designators for other types of relationships (for example, contributor relationships), is strongly encouraged.
  - Contributors include editors, translators, arrangers of music, performers, etc.

700 1_ $a Goldstein, Ann, $d 1949- $e translator.
710 2_ $a American Association of Law Libraries, $e sponsoring body.

- Include a relationship designator, even if it repeats a term used as a qualifier to the name.
100 1_ $a Hunt, William, $c (Cartographer), $e cartographer.

- You may use more than one relationship designator.
100 1_ $a Williams, Vera B., $e author, $e illustrator.

- If the nature of the relationship cannot be ascertained even at a general level, do not assign a relationship designator.
RDA 24: RESOURCE TO RESOURCE RELATIONSHIPS (MARC 76X-78X, 5XX)

LC policy: Give information about the original in a linking field

- 775 field if the same format (e.g., print to print)

775 08 $i Reprint of: $a Simmons, Amelia. $t American cookery. $d New York : Oxford University Press, 1958 $w (OCoLC)2001753

- 776 field if different format (e.g. print to online)

776 08 $i Online version: $t Light rail service. $d Washington, D.C. : Transportation Research Board, National Research Council, 2001 $w (OCoLC)988773142

- If no existing record, use a 500 bibliographic history note

500 Originally published in France in 2018 by Marcel et Joachim under the title: Au musee.

Adapted from Library of Congress (LC) RDA training materials, module 4
https://www.loc.gov/catworkshop/RDA%20training%20materials/LC%20RDA%20Training/Module%204_Relationships.ppt
### Record Type

**BIB**

### Input Standards

**Applicable Fields**  
(R=Repeatable  NR=Nonrepeatable)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Input Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>760</td>
<td>Main Series Entry (R)</td>
<td>Optional/Optional</td>
</tr>
<tr>
<td>762</td>
<td>Subseries Entry (R)</td>
<td>Optional/Optional</td>
</tr>
<tr>
<td>765</td>
<td>Original Language Entry (R)</td>
<td>Required if applicable/Optional</td>
</tr>
<tr>
<td>767</td>
<td>Translation Entry (R)</td>
<td>Optional/Optional</td>
</tr>
<tr>
<td>770</td>
<td>Supplement/Special Issue Entry (R)</td>
<td>Optional/Optional</td>
</tr>
<tr>
<td>772</td>
<td>Supplement Parent Entry (R)</td>
<td>Required if applicable/Optional</td>
</tr>
<tr>
<td>773</td>
<td>Host Item Entry (R)</td>
<td>Required if applicable/Required if applicable</td>
</tr>
<tr>
<td>774</td>
<td>Constituent Unit Entry (R)</td>
<td>Required if applicable/Optional</td>
</tr>
<tr>
<td>775</td>
<td>Other Edition Entry (R)</td>
<td>Required if applicable/Optional</td>
</tr>
<tr>
<td>776</td>
<td>Additional Physical Form (R)</td>
<td>Optional/Optional</td>
</tr>
<tr>
<td>777</td>
<td>Issued With Entry (R)</td>
<td>Required if applicable/Optional</td>
</tr>
<tr>
<td>780</td>
<td>Preceding Entry (R)</td>
<td>Required if applicable/Required if applicable</td>
</tr>
<tr>
<td>785</td>
<td>Succeeding Entry (R)</td>
<td>Required if applicable/Required if applicable</td>
</tr>
<tr>
<td>786</td>
<td>Data Source Entry (R)</td>
<td>Required if applicable/Optional</td>
</tr>
<tr>
<td>787</td>
<td>Other Relationship Entry (R)</td>
<td>Optional/Optional</td>
</tr>
</tbody>
</table>

*From OCLC Bibliographic Formats and Standards*
24.5.1.3: Record an appropriate term from the list in appendix J to indicate the specific nature of the relationship between related works, expressions, manifestations, or items.

**LC-PCC PS for J.1:**

- *LC practice/PCC practice*: Consult the [PCC Training Manual for Applying Relationship Designators in Bibliographic Records](#) for up-to-date guidelines on using relationship designators.
  - The use of relationship designators for resource-to-resource relationships is encouraged.

- *LC practice*: When MARC subfield $i$ for a relationship designator is used in a bibliographic record, give it as the first subfield, capitalize the first word in the designator, and end the subfield with a colon.

**775 08 $i Reprint of (manifestation):** $a Simmons, Amelia. $t American cookery. $d New York : Oxford University Press, 1958 $w (OCoLC)2001753

**776 08 $i Online version:** $t Light rail service. $d Washington, D.C. : Transportation Research Board, National Research Council, 2001 $w (OCoLC)988773142
AUTHORIZED ACCESS POINTS FOR AGENTS

- Agents
  - Persons
- Families [not covered]
- Corporate bodies

- Preferred name is basis of an authorized access point
The number of access points are not limited, either:

- LC-PCC PS 19.2 & 19.3 allows cataloger judgement on recording additional creators and agents.

- RDA: All authors [and others] are listed in the 245 field, and the author with primary responsibility (or the first-named author) goes in the 1xx field, with additional authors in the 7xx field” (RDA Basics, 2012).

From: Copy cataloging using RDA
RDA 9 PERSONS (MARC 100/700)

Changes

▪ More options to differentiate names when needed
▪ Include $e to indicate relationship (Core in 100)

▪ Add first named author to 100, even if there are more than three
▪ Compilers can be in 100 fields
MORE CHANGES

For dates, do not use b. or d. Use a hyphen:
- Read, A. F. C. $q (Alfred Frank Charles), $d 1907-ca. -> approximately
- Terni, Daniel ben Moses David, $d active 18th century-19th century

Include Jr., Sr.:
- Abegg, Martin G., $c Jr.
## RDA 9.19 Elements to Differentiate Name

<table>
<thead>
<tr>
<th>Element</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth or death date</td>
<td>9.19.1.3</td>
<td>Richardson, Alan, $d 1965-</td>
</tr>
<tr>
<td>Fuller form of name</td>
<td>9.19.1.4</td>
<td>Richardson, Alan $q (Alan John)</td>
</tr>
<tr>
<td>Profession or occupation</td>
<td>9.19.1.6</td>
<td>Richardson, Alan $c (Psychologist)</td>
</tr>
<tr>
<td>Other term or rank, honour, or office</td>
<td>9.19.1.7</td>
<td>Richardson, Alan, $c Ph. D.</td>
</tr>
<tr>
<td>Period of activity</td>
<td>9.19.1.5</td>
<td>Richardson, Alan, $c active 1979-1989</td>
</tr>
<tr>
<td>Other designation</td>
<td>9.19.1.8</td>
<td>Richardson, Alan $c (Author of The experiential dimension of psychology)</td>
</tr>
</tbody>
</table>
RDA 11 CORPORATE BODY (110/710)

Changes

▪ Do not abbreviate words unless abbreviated in the preferred name
▪ Include $e – relationship designator (core if 110)

Sources of information

▪ Resource in hand may not be the best source of information in determining the preferred name for a corporate body
▪ Prefer to base preferred name on sources issued by the body, including websites
EXAMPLE (AUTHORITY RECORD)

Previous form of name:

410 1_  $w nnea $a United States. $b Dept. of Transportation.
    $b Office of Consumer Liaison

RDA

110 1_  United States. $b Department of Transportation.
    $b Office of Consumer Liaison

Cross-reference with entire hierarchy

410 1_  United States. $b Department of Transportation.
    $b Office of the Secretary. $b Office of Consumer Liaison
RDA 11 MEETING NAME (MARC 111/711)
(CORPORATE NAME)

Changes

▪ Retain words that indicate frequency
  ▪ Annual
  ▪ Biennial

▪ Authority records can be created for each conference

▪ Include $e – relationship designator (core if 111)
<table>
<thead>
<tr>
<th>Biennial Conference of Research on the Colorado Plateau</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biennial Conference of Research on the Colorado Plateau (12th : 2013 : Northern Arizona University)</td>
</tr>
<tr>
<td>Biennial Conference of Research on the Colorado Plateau (5th : 1999 : Northern Arizona University)</td>
</tr>
<tr>
<td>Biennial Conference of Research on the Colorado Plateau (9th : 2007 : Northern Arizona University)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td>111</td>
</tr>
<tr>
<td>368</td>
</tr>
<tr>
<td>370</td>
</tr>
<tr>
<td>372</td>
</tr>
<tr>
<td>377</td>
</tr>
<tr>
<td>411</td>
</tr>
</tbody>
</table>

**411 2**  
+w nnea +a Conference of Research on the Colorado Plateau (2001- )

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>411</td>
<td>2</td>
<td>Colorado Plateau Biennial Conference</td>
</tr>
<tr>
<td>511</td>
<td>2</td>
<td>+w a +a Biennial Conference on Research in Colorado Plateau National Parks</td>
</tr>
</tbody>
</table>

667  
See also related access points for individual instances of this conference which include specific information about the number, date, or place of the individual conference.
Establishing Personal and Corporate Name Headings with RDA

Felicity Dykas, University of Missouri
Tammie Busch, Missouri State Library

HTTPS://HDL.HANDLE.NET/10355/68807
HYBRID RECORDS

**Hybrid record.** A non-RDA bibliographic record (i.e. a bibliographic record created according to cataloging codes that existed prior to RDA (e.g. AACR2) or a bibliographic record not coded as cataloged according to RDA) to which RDA cataloging elements have been added, either manually or via machine manipulation. The resulting bibliographic record is a considered a hybrid record, as it blends elements of previous practices with the current RDA practices, not an RDA record.

**Hybridization.** The process of adding RDA cataloging elements to a non-RDA bibliographic record (i.e. a bibliographic record created according to cataloging codes that existed prior to RDA (e.g. AACR2) or a bibliographic record not coded as cataloged according to RDA), either manually or via machine manipulation. The result of hybridization is a hybrid record, rather than an RDA record.

HYBRID RECORDS

- Edit AACR2 records to include:
  - Relationship designators for access points
  - Complete statements of responsibility and additional name access points
  - Convert 260 to 264
  - Add 336/337/338 fields
  - Spell out abbreviations in recorded fields or in transcribed fields if “piece in hand”
- **Guidelines for working with RDA and non-RDA records prior to implementation of RDA**
PLANNING FOR RDA

1. Training
   ▪ How much training does your staff need?
   ▪ Will you have access to the RDA Toolkit?

2. Inclusion
   ▪ Who should be included in preparations?
   ▪ Who should be trained?

3. Time, cost, and impact
   ▪ Estimate the time needed for staff training
TIME, COST, AND IMPACT

- Learning hours
  - How many are you willing/able to dedicate?

- Training materials
  - What is your budget for training materials?

Meghan Finch. (2016). Using freely available RDA resources to provide in-house training to a medium-sized academic library. Journal of Library Metadata, 16:2, 94-114, DOI: 10.1080/19386389.20161215736

- Balance necessity with obligations
  - How will you handle backlogs as you transition?
  - How will you handle staff coverage while they are training?
Amigos Library Services offers a single simultaneous user subscription to members at no cost. Additional simultaneous users are available at a 15% discount off the ALA list price when you order through Amigos.

https://www.amigos.org/node/2358

Not an Amigos members? Consider these freely available RDA resources.

Yale University Library, Irving S. Gilmore Music Library
Catalogers Learning Workshop
Adam Schiff’s home page
Troublesome Catalogers and Magical Metadata Fairies
RDA Resources
Online, practical, and free cataloging resources: an annotated webliography by John Baga, Lona Hoover, and Robert E. Wolverton, Jr.
RDA Toolkit YouTube channel
ALCTS webinar archive
CONSER documentation and updates
WHAT'S NEW WITH BIBFRAME

- **BIBFRAME Goes International** webinar (April 2, 2019)
  - **Linked Data for Production** (LD4P)
    - Linked data production pilot for library resources
      - BIBFRAME ontology
    - LD4P2
      - Implementation phase
      - Building a sandbox for 17 PCC participants
      - Training in the use of the BIBFRAME editor

- The **SHARE-VDE** (Virtual Discovery Environment) Project
  - SHARE-VDE is a library-driven initiative to establish procedures for the identification and reconciliation of entities, the conversion of data to linked data, and the creation of a virtual discovery environment based upon the three-layered structure of the BIBFRAME data model.
  - Casalini Libri main goal of contributing in bringing BIBFRAME into practice
    - Developing discovery layer
      - One layer for cataloging and discovery
WORKS CITED


**BOOKS — AVAILABLE THROUGH MOBIUS**


- Moulaison Sandy, Heather and Raegan Wiechert. *Crash course in basic cataloging with RDA.* Santa Barbara, California: Libraries Unlimited, an imprint of ABC-CLIO, LLC, [2015]


- And more:  
Questions? Comments?