

Dealing with AACR2 records in the RDA environment

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A. When to leave records as AACR2

The basic strategy is to leave records as AACR2 unless they are likely to need substantial checking/editing.

A1. Making simple corrections to existing OLIS AACR2 records

This strategy is for minor changes which neither affect a record's structure nor involve rules specific to RDA or AACR2. Some examples are: correcting typos; updating individual controlled access points; correcting indicators in fields not specific to AACR2 records; correcting fixed field codes; changing 490 0 to 490 1 + 8XX; changing 740 to 246 for variant titles; adding or improving subject headings.

- Correct as required.
- Do not change existing abbreviations, dates, square brackets, etc.
- Leave the record coded as AACR2.

A2. Downloading post-2005 full-level English-language AACR2 records from the Library of Congress or British National Bibliography databases

Some downloaded records have 'trusted' status. These are records found in X-BNB or X-Library of Congress whose 008/00-01 is 05 or later, whose encoding level is full, and which either have 'eng' in 040 \$b or have no 040 \$b at all. Because they require minimal editing, there is no need to convert them to RDA.

- Change any 490 0 to 490 1_ + 8XX.
- Remove any 263 fields.
- Remove any 856 except for LC tables of contents and full-text links.
- Otherwise, change nothing except glaring errors, e.g. typos.
- Leave the record coded as AACR2.

NOTE: Many agencies are adding 33X fields retrospectively to their AACR2 records, because it is easier to make good use of these fields to generate displays, facets, etc., if they are in all records rather than just in RDA ones. This is good practice, and does not mean that the records are hybrids – 33X fields are now considered standard-neutral rather than specific to RDA – so these 33X fields should be retained.

B. Converting records to RDA

B1. Help from Aleph and Marc Report

RDA fixes

To help with conversion of records there are various material-specific fixes available in Aleph (Edit Actions>Fix Record), e.g. RDA Fix (Books), RDA Fix (Serials), RDA Fix (DVDs), RDA Fix (Atlases), RDA Fix (Sheet maps), RDA Fix (Music audio CDs). These will:

- Change LDR 18 from `a` to `i`
- Add 040 \$erda
- In some cases, move ISBN qualifiers to subfield \$q and remove their brackets (this works only for the commonest terms, e.g. `pbk.` and `cloth`; it never works if there are multiple qualifiers)
- Convert 260 __ to 264 _1
- Add 264 _4 \$c, as a prompt to the cataloguer to check whether the date is a copyright date or the resource has an additional copyright date.
- In 264 _1, replace `[S.l.]` with `[Place of publication not identified]` and `[s.n.]` with `[publisher not identified]`.
- Add the standard 33X for the type of materials.
 - Cataloguers still need to consider whether the record needs other 33X as well or instead. For instance, BK material may need `still image` in 336 for a resource which is predominantly pictorial or `microform` in 337 and `microfiche` in 338 for a microfiche.
 - Some AACR2 records already have 33X fields, so you may need to delete duplicates.
- In 300, replace `ca.` with `approximately`, `p.` with `pages`, `ill.` with `illustrations` and `col.` with `colour`.
- Add an STA field with the message: `Check: 33X? 26X? RDA changes?` This both serves as a prompt to check for other necessary changes and prevents export. It should be deleted once the record is finalised.

If you would like a fix for some type of material which is not yet covered, please contact [CSS](#).

RDA templates

- There are various material-specific templates in Aleph for original RDA cataloguing, all with names ending in `rda`, e.g. bookrda.mrc, maprda.mrc.
- There is also a tiny template called bk33x.mrc, which contains just the standard 33X fields for BK materials in which text predominates. If you use Edit Actions>Expand from Template (Ctrl-E) and choose this template, it will add these fields to the record in the MARC Editor if it has no fields with those tags already. This is useful for records whose 33X fields have been removed by mistake.

Marc Report

The latest version of MARC Report has a very wide range of messages which are triggered by incompatibilities between a record's coding and presence/absence of 33X, abbreviations, etc. Please act on these messages where appropriate, but let [CSS](#) know if any of them seem unhelpful.

B2. Making substantial changes with resource in hand to existing OLIS AACR2 records or newly-downloaded AACR2 or hybrid records

This strategy is for:

- (i) OLIS records requiring substantial changes. Examples would be: adding missing data; finalising records and removing STAs; upgrading from a lower level to full; deriving a record for a new edition from an existing record; converting a foreign-language record to English.
- (ii) Downloaded records other than those which have trusted status.

Simple changes

- 1) Use the **RDA fix (books)** or, if deriving a new record, **Create record for new edition (RDA)**.
- 2) Adjust or add **33X, 006 and 007**¹ as necessary.
- 3) Remove any **GMD** (245 \$h).
- 4) If **264 _1 \$c has a copyright date** (shown by a preceding `c`, e.g. `c1960`), change this to a publication date (if one is found on the resource) or a supplied publication date, conjectural if necessary. Put the copyright date in 264 _4 \$c, preceded by the © symbol.
- 5) If 264 _1 \$c has a publication date, but there is also a **copyright date on the resource**, add it in 264 _4 \$c, preceded by the © symbol.
- 6) Replace any cataloguer-supplied abbreviations in **transcribed fields** (245, 250, 264, 490) but retain any abbreviations found on the resource.
- 7) Use the RDA formulae for **approximate dates**, e.g. `[between 1800 and 1899]` rather than `[18--]`.
- 8) In **300**, replace **abbreviations** with words where appropriate, e.g. , change `cm.` and `mm.` to `cm` and `mm` if the full stop is not required as final punctuation (but retain `ft.`, `in.`, `hr.`, `min.`, `sec.`).
- 9) Add **relators** in subfield \$e to access points for persons, families and corporate bodies if appropriate.

Structural changes

- 10) If the resource has more than three collaborative creators and the AACR2 **Rule of 3** has been applied, you will need to:
 - transcribe the statement of responsibility fully or give the first with `[and N others]`
 - create a 100/110/111 main entry for the first or principal creator
 - change any 130 0_ to 240 10 or, if there is no 130, change 245 0 to 245 1
 - create extra access points for the extra entities listed in the statement of responsibility.
- 11) If the Rule of 3 has been applied to a group of contributors rather than creators (e.g. editors, illustrators) you will need to transcribe the statement of responsibility and create additional access points for the extra entities as above, but the choice of main entry will not be affected.
- 12) If the resource is a **compilation of works by different authors** and the main entry is for the creator of the first work, you will need to change this to title main entry by:

¹ 006 and 007 should not be affected by RDA, but some OLIS records lack some or all of this data, and it makes sense to harmonise it with 33X.

- changing the 1XX to 7XX
 - if there is a 240 10, changing it to 130 0_
 - if there is no 240, changing 245 1 to 245 0.
- 13) If there is a 130 \$l or 240 \$l specifying **multiple languages**, replace this with one 700/ 710/ 711/ 730 field for *each* language, with 2nd indicator '2':
- If you remove a 240, replace it with 700/ 710/ 711 name-title fields. In each new field the name element will duplicate the subfields and content of the 1XX field, the content from the old 240 \$a will go in subfield \$t, any other subfields from 240 (except \$l) will be transferred to the new field, and, if it is for a version in a language other than the original, the new field will have a subfield \$l with just one language in it.
 - If you remove a 130, replace it with one 730 field for each language and change 245 1 to 245 0. The 730 subfields will be exactly the same as those in the old 130, except that any field for the original-language version will have no subfield \$l and those for translations will each have just one language in subfield \$l.
- 14) If a 130 \$a, 240 \$a, 730 \$a, 830 \$a, 6XX \$t, 7XX \$t or 8XX \$t contains just the **generic title** 'Selections' and there is no NACO record for the work/expression, change this to 'Works.\$kSelections' or, if all the contents are in a single broad genre such as 'Poems', to the genre term with '. \$kSelections'.
- 15) For resources which have a **7XX added entry for a previous edition with a different title or a different first-named creator**, *if the information is readily available*, decide whether the added entry is really for a different work (i.e., radically written or with a change to the creator-team, not just a change to their order) or only for a different expression. If the latter:
- change a 730 field to 130 (and 245 0 to 245 1)
 - change a 700/ 710/ 711 field to 1XX + 240; the entity named in 1XX should be the first/principal creator of the *original* edition rather than the current edition.
- 16) Consider whether any changes to access points require changes to **5XX notes**, or additional notes.
- 17) Finally, change coding as necessary to reflect your editing, e.g. change **encoding level** to full and remove any **RTP** or **STA** fields which are no longer appropriate.

B3. Converting records if the resource is not in hand

You may occasionally need to edit AACR2 (or earlier) records without the resource in hand, e.g. if you are creating OLIS records from a card catalogue. In that case

- you will have to leave any abbreviations found in transcription areas, because you will not know if the abbreviations occurred on the resource
- if you have to replace ' ... [et al.]' you will not be able to specify the number of 'others'.