RDA structure and the RDA Toolkit

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This short guide is intended to be used both by cataloguers with AACR2 experience and by new cataloguers. The latter group are asked to pardon the frequent references to AACR2.
Because RDA is a very large resource and not designed specifically for the use of library cataloguers, we hope that most cataloguers will find the RDA/MARC21 training/reference modules on the Cataloguing documentation page adequate for most tasks and will not have to consult RDA itself very often. If you find that our inhouse documentation has important gaps, please tell CSS.

You are likely to need to consult RDA itself mainly for lists of approved terms (e.g. carrier types for 300 $a or relator terms for X00 $e) or for abstruse information such as which language to use in an access point for a 13th century Byzantine work which is generally known by its Latin title.

You are very welcome to explore the RDA Toolkit further for your own interest, but please bear in mind that the number of concurrent users is limited and log out as soon as you finish. We may sometimes need to ask cataloguers to avoid inessential use, e.g. during training periods.

Overview

- The RDA Toolkit contains the RDA instructions themselves and a wide range of other resources for RDA users, including:
  - **Library of Congress/Program for Cooperative Cataloging Policy Statements (LC-PCC PS),** which amplify the RDA instructions, state which options LC and PCC are adopting where RDA allows choice, and give many helpful MARC examples. They are a kind of successor to the Library of Congress Rule Interpretations (LCRI) for AACR2, but they are less comprehensive and leave more to cataloguer judgment.¹
  - The complete **Anglo-American Cataloguing Rules (AACR2),** with links to related RDA instructions.
  - **Mappings** between standards, including a particularly useful mapping from MARC elements to RDA instructions.
  - **Examples of RDA records,** both in MARC format and as a format-neutral list of elements.
  - **Workflows** created by various agencies which use RDA. Some are for private use by the agency’s cataloguers, but most are available to all Toolkit users. They give us an insight into how other agencies, e.g. the British Library, are interpreting and using RDA.
  - **Alternative views** of the RDA instructions.

- RDA itself and the Toolkit site are in continual development, so the instructions, resources and views are subject to change. For a more detailed and more frequently updated guide, please see the Library of Congress guide, [Using the RDA Toolkit](#).

- You can also access the Toolkit through [Cataloguer’s Desktop](#). This enables you to use the CD3 search engine and to search across the Toolkit and other resources together. For instructions on setting up CD3 to access our Toolkit subscription, please see [Getting Started with RDA Toolkit in Cataloguer’s Desktop](#).

¹ For the hundreds of PCC member libraries in the United States these policies are mandatory, so in some areas (e.g. recording illustrations) the policies tend to specify a minimum acceptable standard. It is likely that LC and some other agencies will often be more generous.
Logging in and creating a profile

- The URL is http://access.rdatoolkit.org/. You can find a link in the RH pane of the Cataloguing page.
- The account ID and password boxes are at the top right of the page. You can obtain the institutional login from CSS. Once you have logged in, the institutional name ‘The Bodleian Libraries’\(^2\) will appear in the blue panel above the boxes.
- If your login attempt fails you will still be able to use some of the Toolkit resources, but as soon as you try to use a subscription-only resource you will be offered a login box.
- If you would like to be able to create your own bookmarks you also need to set up a personal profile. To do this, click on the Create icon at the top right of the page and enter the required details. If you already have a personal profile, you can log in to it using the Profile Name and Password boxes. Your name will appear above the institutional name in the blue panel. Once you are logged in, you can manage your profile using the My Profile icon.
- To create bookmarks when in the RDA text, use the Bookmark icon.
- Our subscription allows only a small number of concurrent users, so please log out as soon as you have finished.

The RDA table of contents

- The navigation pane is to the left of the page and has tabs for RDA, Tools and Resources. The RDA tab gives the standard RDA table of contents (ToC). Clicking on the plus sign beside a section heading will show the subsections under it.
- The ToC is organised roughly according to FRBR entities, tasks and relationships, but it groups manifestations and items together and works and expressions together. The main sections are:
  - **Section 1: Recording attributes of Manifestation & Item**
    This is roughly equivalent to AACR2 Part 1 (Description), so has a great deal of familiar information for people with AACR2 experience once they get past the unfamiliar vocabulary of the main chapter headings.

    The biggest difference from AACR2 is that all kinds of materials are treated together rather than having separate chapters. This makes the treatment of some elements rather long, so it may be easier to find the information you want by opening ToC branches down to the last twig rather than by scrolling through text.

    RDA does not use the AACR2 idea of ‘areas of description’ to group elements together, because the independence of elements is important if they are to be freely harvested and used for new purposes. However the ToC does generally list elements according to the statements in which they tend to occur, such as Publication Statement, which covers place, publisher and date; and this has much the same effect as assigning them to areas.

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\(^2\) Although many OLIS contributors are not part of the Bodleian group, The Bodleian Libraries handles the subscription on behalf of OLIS, which is why its name appears here. This arrangement enabled us to negotiate a single subscription to cover all OLIS libraries.
• Chapter 1 gives general guidelines.

• Chapter 2 (Identifying Manifestations and Items) gives specific instructions for most descriptive elements: titles, designations of edition, statements of responsibility, places, publishers etc., dates, series statements, identifiers (ISBNs, etc.) and various elements specific to special materials such as serials and cartographic materials. These are the elements which RDA associates with the FRBR user task ‘Identify’, i.e., making clear which manifestation is which.

• Chapter 3 (Describing Carriers) covers the physical attributes of resources (including online resources), e.g. type, size and number, so it roughly corresponds to MARC 300 $a, $b and $e and to the X.5 sections in the chapters of AACR2 Part 1.

  These are the elements which RDA associates with the FRBR user task ‘Select’, since they are often used to choose between resources which all basically meet a user’s requirements. However RDA recognises that all the elements in chapters 2 and 3 may be of use both for identifying and for selecting.

  Chapter 3 does not include information about illustrations, colour, sound, etc., because these are aspects of the content rather than of the specific publication and so are expression-level (see chapter 7).

• Chapter 4 (Providing Acquisition and Access Information) deals with information related to the user task ‘Obtain’, e.g. URLs for e-resources and notes about restrictions on use or access.

  Section 2: Recording Attributes of Work & Expression

• Chapter 5 gives general guidelines.

• Chapter 6 (Identifying Works and Expressions) is roughly equivalent to AACR2 Part 2 chapter 25 (Uniform Titles). It gives instructions for choosing the ‘preferred’ (i.e. standard) title for a work, recording variant titles, recording other information about the work, recording information about particular expressions of the work (e.g. language, version, medium) and making authorised access points (= headings) for works and expressions.

• Chapter 7 (Describing Content) is roughly equivalent to the X.5C sections of AACR2 Part 1 (Other Physical Details) and mainly covers the kind of information entered in 300 $b and related notes.

  Section 3: Recording Attributes of Person, Family & Corporate Body

  This is roughly equivalent to the AACR2 Part 2 chapters on Headings for Persons and Headings for Corporate Bodies. The newcomer is ‘Family’, which is treated very similarly to ‘Person’.

  Each chapter contains instructions about choosing the preferred name for the entity and forming an authorised access point for it, together with instructions about recording variant names and additional information which are relevant mainly to NACO cataloguers.

• Chapter 8 gives general guidelines.

• Chapter 9 (Identifying Persons) corresponds to AACR2 chapter 22.

• Chapter 10 (Identifying Families) is all new.

• Chapter 11 (Identifying Corporate Bodies) corresponds to AACR2 chapter 24.

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3 Variant titles and other information for works and expressions are recorded in authority records, so those sections are mainly for NACO cataloguers.
Section 4: Recording Attributes of Concept, Objects, Event & Place
Most of this section (chapters 12-15) has not yet been written. If completed it would mainly serve to extend RDA into subject cataloguing, but is likely to give general principles rather than introducing an alternative to LCSH and the other systems in current use.

- Chapter 16 (Identifying Places) had to be written, to meet the need for placenames as access points representing jurisdictions and as qualifiers for works and corporate bodies. It retains most of the AACR2 chapter 23 rules, including special treatment for political units which are now history, such as U.S.S.R. and Yugoslavia; but there have been minor changes, notably in the treatment of Malaysia and the Channel Islands.

Section 5: Recording Primary Relationships Between Work, Expression, Manifestation & Item

Section 6: Recording Relationships to Persons, Families & Corporate Bodies

Section 8: Recording Relationships Between Works, Expressions, Manifestations & Items

These sections between them cover roughly the same material as AACR2 chapter 21, Choice of Access Points.

The main difference is that for RDA it can be important to know whether entities are related at work-level, expression-level, manifestation-level or item-level. For instance, Shirley Hughes has a work-level relationship to *Alfie gets in first*, which she wrote, but only an expression-level relationship to *My naughty little sister*, which she illustrated.

RDA does not provide instructions for choosing main entries. These have to be extrapolated from the instructions for choosing the first element of name-title headings in chapter 6 and the instructions in 19.2 as to which roles qualify as ‘creator’.

The ‘primary’ relationships covered in Section 5 are those within a single WEMI hierarchy (a work realised in an expression, embodied in a manifestation and exemplified in an item). The relationships covered in section 8 are those between different WEMI hierarchies, e.g. where one work is based on or supplements or comments on a different work.

Section 7: Recording Relationships to Concepts, Objects, Events & Places consists of one brief chapter (23) which first appeared in April 2015 and gives very general guidelines for recording relationships between works and subjects.

Section 9: Recording Relationships between Persons, Families & Corporate Bodies is not immediately relevant to library cataloguing.

There are several appendices, covering capitalisation, abbreviations, initial articles, mappings between RDA, ISBD and MARC, additional instructions on names of persons (particularly helpful for complex non-English names), titles of nobility and rank, dates in the Christian calendar and various lists of relator terms. OLIS will be using only the relator terms from Appendix I, the ones which are added to access points for persons, families and corporate bodies to specify their roles (usually in subfield $e$).
Navigating RDA and LC-PCC PS (Practical)

To find out what to do about introductory words preceding a title:

1) Use the minus sign before the RDA heading at the top of the ToC to close it completely.

2) Open branches as follows: RDA>Section 1>2. Identifying Manifestations and Items>Title>Basic Instructions on Recording Titles and click on Introductory Words, Etc.

3) As well as reading the rule, notice the examples, distinguished by a yellow background.

4) Notice also the optional addition, characterised by a green heading and a green line beside the text. All exceptions and alternatives are presented in this way, to prevent confusion with the standard instructions.

5) OLIS would use the optional addition of a variant title, so use the RDA link to go to the instructions for variant titles.

6) Scroll down to Recording Variant Titles (2.3.6.3) and look at the examples.

7) You will also see a LC-PCC PS link. Click on this. You will find plenty of good advice about provision of variant titles, with MARC examples. Notice that when you moved to LC-PCC PS you moved to the Resources tab of the LH pane, where LC-PCC PS is located. That means that you can switch between the RDA instructions and the LC-PCC PS advice just by changing tabs.

8) In the RDA tab, return to the instructions about introductory words by using the back button of your browser.

Searching (Practicals)

1) If you were not sure which branches to open, you could search instead.

2) In the RDA Quick Search box, enter 'introduc*'. You will get a list of results with the one you want at the top.

3) If you want a more sophisticated search, use the magnifying glass icon to get the Advanced Search page. In this you can include other Toolkit resources and/or specify which parts of resources to search.

To find out whether illustrations are a core element for RDA and/or for LC-PCC PS:

4) In the search box enter ‘illustr*’, to get results for ‘illustrations’, ‘illustrative matter’, etc. Select both RDA and LC-PCC PS by checking the boxes beside them. Click the Search button at the bottom of the page.

5) The results are sorted by relevance, but that means that various topics are mixed up. To see the results by ToC order, change ‘Relevance’ to ‘Document Order’ in the dropdown box at top right.

6) This shows some surprising results, e.g. one for parallel other title information. If you click on this you will see that ‘illustration’ only occurs here in an example. You can exclude examples from your

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4 The asterisk is a wildcard, representing any number of unspecified characters. Using it here means that you will get results for both ‘introduction’ and ‘introductory’. To represent a single unspecified character, use ‘?’, e.g. ‘wom?n’ to get results for both ‘woman’ and ‘women’.
search by clicking on the magnifying glass again, checking the Exclude Examples box and searching again.

7) This time, when you put the results into document order you will clearly see the RDA results you want, all beginning with 7.15. However, if you look at the results for 3.4 you will see that they have the icon for core elements next to them, while the 7.15 results do not. From this you may conclude that illustrations are not a core element for RDA. In the RDA text itself, core elements are labelled as **CORE ELEMENT**.

8) To discover whether illustrations are core for LC-PCC PS you will have to move to the next page of results. You will find a result for 7.15 Illustrative Content labelled as ‘CORE ELEMENT FOR LC’, which looks promising. However, if you click on the result and read the text, you will find that the element is core only for resources intended for children.

9) You can check through the other results by using the top right-hand back and forward arrows.

10) The Advanced Search also has options to limit RDA results by instruction number or by the type of content, media, issuance (serial/ multipart/ integrating/ single-part) or work (legal/ musical/ official/ religious).

**Other views**

**Limiting what you see**

The RDA text itself can be filtered by using the 'View Text' icon, which will open the menu shown on the right. (‘Basic’ instructions are those identified by the Joint Steering Committee for RDA for use by organisations which do not have highly-trained staff and are identified in searches by the icon ![icon].) We do not recommend using the core and basic filters, but it is sometimes helpful to hide examples to get an overview of instructions.

**Changing the order**

In the Tools tab there is an RDA Element Set view. The ToC for this arranges elements under FRBR or FRAD entity, then by whether each is an attribute or relationship, then by whether it is core or ‘enhanced’ (= non-core) or (sometimes) primary or specialised, then by alphabetical order. The text conflates instructions from various places, so it may seem repetitive or out of order.

**Mind map**

If you like visual structures, you may be interested in the Entity Relationship Diagram in the Tools tab. The ToC for these diagrams uses the same criteria as the Element Set view, but the final layer is not an alphabetical list but a diagram of elements grouped by statement, from which you can click through to the relevant text. The most useful is probably the Manifestation Enhanced diagram. However, the Diagram is now labelled ‘(Archival)’, which suggests that it is not being updated.

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5 Functional Requirements for Authority Data.
Approaching RDA from MARC21 (Practical)

This is often a simple way to find instructions for a particular MARC element.

To find out how to enter illustrative material in 300 $b:

1) In the Tools tab, open RDA Mappings, then click on MARC Bibliographic to RDA Mapping.
2) Scroll to 300 $b. There are lots of results, because Other physical details covers a range of RDA elements, so look for ‘Illustrative Content’ in the last column and click on the RDA link.
3) Scroll through the instructions and examples. It looks much like AACR2, but there is nothing about colour in illustrations, because in RDA ‘colour’ is a separate element. Notice also that 7.15.1.4 shows some detailed information which would be entered in a MARC 500 field rather than 300 $b. This underlines that the mapping is merely a finding aid, not a set of instructions for MARC coding.

Approaching RDA from AACR2 (Practical)

Cataloguers who are familiar with AACR2 may sometimes find it useful to start in AACR2 and use links to corresponding RDA elements; but please bear in mind that there is not always a 1:1 equivalence between AACR2 and RDA elements.

To find out what terms are available for use in 300 $a:

1) In the Resources tab, open the following branches: AACR2>Part 1: Description>1: General Rules for Description>Physical Description Area.
2) Click on 1.5B Extent of Item (including Specific Material Designation). Notice that the AACR2 text still has the familiar links to LCRI, MARC, etc., as well as to newer resources.
3) Click on the RDA link. There are multiple results, but the first is obviously the one you want.
4) The instruction at 3.4.1.3 says to use a carrier type from a list at 3.3.1.3, which you can access by following the RDA link to that; but it also includes an alternative (marked by a green line in the left margin) to use a ‘term in common usage’, just as in AACR2.
5) Notice that you are now in the RDA tab. The AACR2 text is still open where you left it in the Resources tab, so you can switch between the standards and compare them.

Other Toolkit resources

There are many other resources in the Tools tab, including user-contributed workflows and mappings. The global workflows include some important documents from bodies such as CONSER.

One useful resource is the set of Examples of RDA Records (JSC). These can sometimes solve puzzles about how RDA should be entered in MARC.

1) In the Tools tab, open Examples of RDA Records (JSC) and click on MARC Encoding. A new window opens. Select ‘Examples of RDA Records (JSC) - bibliographic records’.
2) This opens a PDF document. It shows examples in various formats, each shown first as a format-neutral list of RDA elements and then as a MARC record.
3) The easiest way to find the element you want is to use an ordinary Ctrl-F search.