

Library of Congress Training for
RDA: Resource Description & Access

Using the RDA Toolkit



Prepared by

Tim Carlton

Cooperative and Instructional Programs Division

With the assistance of Kate James and Judith Kuhagen
Policy and Standards Division

Cooperative and Instructional Programs Division
Library of Congress

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**Library of Congress Training for
*RDA: Resource Description & Access***

Using the RDA Toolkit

Course Summary

This course is one element in a comprehensive suite of training prepared for the Library of Congress implementation of “RDA: Resource Description & Access” as a new cataloging code. It is intended for any person who needs to learn and apply the new rules in the processing of material for the Library collections.

In this course, participants will learn how to navigate and search in the RDA Toolkit, personalize the Toolkit, utilize user-contributed content, and locate help and additional resources.

Learning Objectives

At the end of this course, participants will be able to:

- log into the RDA Toolkit with both the LC institutional account and their User Profile
- access the RDA Toolkit through Cataloger’s Desktop
- utilize the tools on the User Menu and Document Menu
- browse the components of the Tools tab and Resources tab of the Browse Tree
- navigate in the Document pane and interpret visual cues in RDA instructions
- follow internal links to related RDA instructions and to Library of Congress Policy Statements
- navigate using the RDA Table of Contents, Glossary, and Index
- follow links from AACR2 rules to the related RDA instruction
- perform Quick Searches by RDA instruction Number and topical search terms
- perform Advanced Searches to specify the documents to be searched, to exclude examples, and to limit by Instruction Type
- create and manage Bookmarks and Saved Searches
- consult pre-existing Workflows
- consult pre-existing Mappings
- locate help and additional resources

Training Methods:

Guided exploration and hands-on exercises

Duration:

3 hours

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Unit 1: Getting Started

What is the RDA Toolkit?

RDA Toolkit is an integrated, browser-based, online product that allows users to interact with a collection of cataloging-related documents and resources, including *RDA: Resource Description & Access*, the new cataloging standard that will replace AACR2. Among the other resources available through the Toolkit are:

- *AACR2*, to help you know where to begin
- *Library of Congress Policy Statements* (LCPS), the ‘RDA-version’ of LC Rule Interpretations
- Workflows and other procedural documentation that is created by subscribers and can be shared within an organization or with the entire community of subscribers
- Mappings of RDA to different schemas, including MARC 21

LC’s Institutional Subscription Account

The Library subscribes to the RDA Toolkit using an Institutional account. The institutional account is designed for multi-user environments where one subscription is shared with an unlimited number of user profiles (individuals) within the same institution.

Accessing the RDA Toolkit

➤ The RDA Toolkit can be accessed either directly or through Cataloger’s Desktop. You may find that there are advantages in using Cataloger’s Desktop, and we will address that a bit later. But first, we will concentrate on the Toolkit itself.

1. Open Firefox¹ and go to the **RDA Toolkit home page** at: <http://www.rdatoolkit.org/>.

This page has general information, accessed from the navigation pane at the left. Although some of these resources are useful, the truly ‘helpful’ resources are accessed from the actual Toolkit itself; we will cover those in Unit 6.



The Access RDA Toolkit icon above the left-hand navigation pane is a link that will take the user to the Toolkit itself at <http://access.rdatoolkit.org/>.

2. Click on the **Access RDA Toolkit** icon

➤ Users who want to go directly to the RDA Toolkit itself, bypassing the informational home page, can bookmark the Toolkit URL <http://access.rdatoolkit.org>. From this bookmarked page, you can always open the home page information section in a new window by clicking on the RDA Toolkit logo at the left end of the top blue banner.

¹ We will use Firefox in class. You can also utilize the RDA Toolkit in Internet Explorer, version 8 and later.

Authentication and Login

The Authentication section in the right corner of the blue bar at the top of the Toolkit indicates your authentication status. The three statuses are discussed below. LC staff will use the second status, “Authenticated”, and have the option of proceeding to the third status, “Full Access,” by logging into their User Profile.

Unauthenticated

An empty blue bar indicates that a user is not authenticated to an active RDA Toolkit account. Even in this unauthenticated status, you can use some of the Toolkit functionality. You can:

- browse the Table of Contents (on the RDA tab)
- view the Library of Congress Policy Statements (on the Resources tab)
- view the Other Resources (on the Resources tab)

Authenticated

However, in order to view the actual RDA instructions, you must login and be “authenticated.”

3. In the first field, type your User Name
4. In the second field, type your Password
5. Click on **Login**

The “Library of Congress” legend and “Create” button indicate that you are authenticated to LC’s Toolkit account, but you do not have full use of the site until you login to your user profile. You are able to view the full RDA, Shared Workflows, and the RDA Element Set View but not able to:

- set preferences
- add bookmarks
- save searches
- create, save, and share workflows and mappings

Full Access

Once you are authenticated, you can login with your user profile and password.

6. Type your **Profile Name**
7. Type your **Password**
8. Click on **Login**

After logging in with your Profile Name and Password, you will have full access and see your name:

User Profiles

The user profile login can be easily confused with the subscription account login. The Profile Name login boxes display only after the user has been authenticated to the institution-wide account and “Library of Congress” appears in the blue bar.

You are urged to create a Profile so you can make full use of the Toolkit. Profiles are required to set preferences, create bookmarks, save searches, and create workflows and mappings.²

User Profile Password Email Reminder

If you have forgotten your password, you can click on the “Email Password” link (just below “Library of Congress” in the blue banner) once you have been authenticated. You will be prompted to type your Library of Congress email address and click on “Send.” An email with your password will appear in your Outlook Inbox shortly.

Rules for User Names, Profile Names, and Passwords

The rules for all of these are:

- No minimum or maximum number of characters
- Not case sensitive
- All ASCII characters are allowed. Non-Latin script characters are not allowed. Spaces are discouraged

Accessing RDA through Cataloger’s Desktop

You can access RDA from Catalogers’ Desktop -- provided you already have an RDA account. There can be several advantages to using the Toolkit within Cataloger’s Desktop:

- You may already be familiar with many features of Cataloger’s Desktop
- You can search multiple resources in a single search (e.g., RDA, DCM, DCRMB, SHM)
- Search results are displayed in a separate frame so you don’t have to click back and forth
- You can “Hide” the rail pane to display more text in the document pane
- You can create bookmarks within RDA using Cataloger’s Desktop
- You can click on “Next Section” and “Previous Section” to navigate through documents
- You can save your Searching history
- You can more quickly expand and collapse the TOC in Cataloger’s Desktop

There are also some disadvantages:

- You cannot use the Advanced Search features of the Toolkit (e.g., AACR2 rule number)
- Although the relevant section of RDA is opened when a search is run, the search term is not highlighted within RDA hits, as it is within other documents
- Neither the RDA “Synch TOC” feature nor the Cataloger’s Desktop “Sync to TOC” feature works
- The RDA Index is not available; nor is any of the content of the Tools Tab of the Toolkit

² For instructions on how to create a User Profile, see Unit 4, “Personalizing the Toolkit.”

Configuring Cataloger's Desktop

You will first need to perform this two-step configuration process:

1. In your browser, set an option to allow the Toolkit as an exceptional third-party cookie:
 - a. In Firefox:
 - i. Go to **Tools > Options**
 - ii. Click on the **Privacy** tab
 - iii. Click on **Exceptions**
 - iv. Type **access.rdatoolkit.org** in the "Address of website" field
 - v. Click on **Allow**
 - vi. Click on **Close**
 - vii. Click on **OK**
 - b. In Internet Explorer:
 - i. Go to **Tools > Internet Options**
 - ii. Click on the **Privacy** tab
 - iii. Click on **Sites**
 - iv. Type **access.rdatoolkit.org** in the "Address of website" field
 - v. Click on **Allow**
 - vi. Click on **OK**
 - vii. Click on **OK**
2. Set the preference within Cataloger's Desktop
 - a. Open Cataloger's Desktop
 - b. Click on the blue **Preferences** 'cog' icon
 - c. Click on the yellow **General Preferences** 'cog' icon
 - d. Scroll to the bottom
 - e. Enter your RDA Username **lc-rda**
 - f. Enter the RDA Password **rda**
 - g. Select the **first radio button**
 - h. Click on **Save**

RDA: Enter your RDA Username and Password in order to access the RDA resources.
If you do not have an RDA login, click [HERE](#) to sign up for RDA

RDA Username

RDA Password

Open RDA within Cataloger's Desktop Open RDA outside of Cataloger's Desktop

After setting this Preference, you would open RDA just as you would any other Cataloger's Desktop resource: click on the resource in the Cataloger's Desktop Rail Pane.

- If you select RDA and one or more of the other Desktop resource(s) before performing a search, the search will be performed in all of the resources.

Unit 2: Interface and Navigation

User Menu

The User Menu is located at the top-right of the RDA interface, below the indication that you are authenticated into the Library of Congress account.



RDA Quick Search

The RDA Quick Search will search only RDA itself. From any location in the Toolkit, you can:

- Search for a specific RDA Instruction number
- Search for a phrase in RDA Chapters, Appendices, Glossary, and Index.

The RDA Quick Search will be covered in hands-on detail in Unit 3.

Advanced Search

The Advanced Search allows you to create advanced searches of RDA and the other documents in the RDA Toolkit. It also allows you to save searches for future use.

The Advanced Search will be covered in hands-on detail in Unit 3.

My Profile

1. Click on **My Profile**

“My Profile” allows you to manage your personalization of the Toolkit. You can:

- reset your current profile (Name, Email, Profile Name, and Password)
- set preferences
- run, delete, edit, and rename your saved searches
- delete or navigate to your bookmarks
- edit, share, and delete user-contributed content (Workflows and Mapping)

Support

2. Click on **Support**

“Support” is used to request support through the RDA Toolkit Support Center.

Log Out

(In class, do **NOT** click on Log Out)

Logging out takes you out of “authentication” status, but does not entirely close the Toolkit. You remain in “unauthenticated” status, and can still do some things on the Browse Tree.

Browse Tree -- Tools Tab

1. Click on the **Tools** tab

RDA: Element Set View

The Element Set View is an arrangement of the RDA instructions, sorted by RDA Element. The elements are listed under FRBR and FRAD entities, with subgroups for Attributes and Relationships under each Element. Clicking on a reference takes you to the RDA content. The Element Set view can also help you determine appropriate terms for searches if you don't know the name of specific elements.

2. Click on the **plus sign (+)** before **RDA: Element Set View**
3. Click on the **plus sign (+)** before **FRBR Entities**
4. Click on the **plus sign (+)** before **Manifestation**
5. Click on the **plus sign (+)** before **Attributes**
6. Click on the **plus sign (+)** before **Core**
7. Click on **RDA Core Element: Title**
8. Scroll up on click on the **top-most minus sign (-)** to collapse the **Element Set View**.



RDA Mappings

The RDA Mappings, created by the Joint Steering Committee for Development of RDA (JSC), help you navigate from a known MARC instruction to a related RDA instruction, or the reverse.

9. Click on the **plus sign (+)** before **RDA Mappings**
 10. Click on **MARC Bibliographic to RDA Mapping**
 11. Scroll down to the **first entry for the 245 c** subfield
 12. Click on the grey **link in the first column**
This link opens the MARC 21 Bibliographic Format, in its own window, to the 245 data.
 13. **Close** the new browser tab
 14. Click on the **blue link to instruction 2.4.2**
This takes you to that instruction *and* changes your tab in the Browse Tree.
 15. Click on the **Tools** tab
 16. Click on **MARC Authority to RDA Mapping**
You could now follow these links, just as you did in the MARC Bibliographic Format.
- RDA Mappings will be helpful as a 'bridge' to RDA, but should not be used as a 'crutch'; you need to understand and be able to confidently navigate the RDA structure.

Other Tools on the Tools Tab

- We will work with **Workflows** and **Mappings** in a later unit.
- **Entity Relationship Diagrams** are visual representations of data elements defined or inferred by RDA instructions.
- **Schemas** are machine-readable representations of these same data elements.
- The main audiences for these last two are likely to include database developers, IT staff, and education professionals. You may wish to investigate them on your own.

Browse Tree -- Resources Tab

The Resources tab provides the full text of AACR2 and the LC Policy Statements, and Other Resources. Especially as you start working with RDA, you may find it helpful to navigate from a known AACR2 instruction to the related RDA instruction, or to go directly to an LCPS.

1. Click on the **Resources** tab



AACR2

2. Click on the **plus sign (+)** in front of **AACR2**
3. **Expand the hierarchy** and open the rule for recording **illustrative matter** for **books (2.5C1)**
4. Click on the **blue RDA link** to learn how to handle such data under RDA

Do you notice a key difference in the RDA rule?

(Note that clicking on the link, in addition to taking you to RDA instruction 7.15.1.3, also changes your tab in the Browse Tree)

5. Click on the **Resources** tab
6. Scroll up and click on the **minus sign (-)** before **AACR2** to collapse this view.

Library of Congress Policy Statements

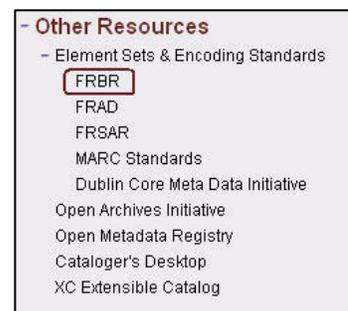
Let's see if there is an LCPS for the alternative to the RDA instruction we just viewed.

*(Note: it is more efficient to access the LCPS by following the green **LCPS** link within RDA -- but I want you to practice navigating the hierarchy)*

7. Click on the **plus sign (+)** in front of **Library of Congress Policy Statements (LCPS)**
8. **Expand the RDA 7 hierarchy** and click on the **LCPS for 7.15.1.3 Alternative**
How does this LCPS compare to LC practice under AACR2?
9. Scroll up and click on the **minus sign (-)** to collapse the LCPS hierarchy
10. Click on the **plus sign (+)** in front of **Other Resources**
11. Click on the **plus sign (+)** in front of **Element Sets & Encoding Standards**

We will not view these resources in class, but you are encouraged to view them on your own. Among the more useful links:

- **FRBR, FRAD, and FRSAD** take you to an IFLA page; the full text of **FRBR** can be opened from there
- **MARC Standards** takes you to LC's MARC home page
- **Cataloger's Desktop** takes you to the login page for that resource



- We will explore the three links at the bottom of the Browse Tree -- "About," "Help," and "Feedback"-- in Unit 6.

Tips on Using the Interface

Before we navigate through the RDA instructions, let's learn some basics about the interface.

Sizing the Browse Tree

You can increase the size of the document window by narrowing the width of the Browse Tree (sometimes referred to as the “Table of Contents,” but this is confusing because RDA itself has a Table of Contents). As in other applications, you can drag the vertical border between the two panes; you can even hide the Browse Tree by moving the border *all the way* to the left.

Expanding and collapsing the Browse Tree

Expand the browse tree hierarchy by clicking on “+” signs; click on “-” signs to collapse.

Changing the font size

You can increase the size of the font by pressing the key combination <Ctrl> <plus sign>. You can decrease the size of the font by pressing the key combination <Ctrl> <minus sign>.

Core elements

The elements identified by the Joint Steering Committee as core elements are labeled with the blue legend **CORE ELEMENT** just below the name of the element. If there are conditions related to the core assignment, additional information will appear after the label.

Visual cues within the instructions

1. Click on the **RDA** tab
2. Click on the **plus sign (+)** in front of **RDA**
3. **Expand** the hierarchy of “**Recording Attributes of...**” and then of **Section 1**
4. **Expand** the hierarchy as needed and display instruction **2.3.2**

Definitions are indicated by reddish-brown text and a down arrow, and take you to the Glossary.

4. Click on the reddish-brown text **title proper** in **2.3.2.1**
5. Click on the browser “**Back**” arrow to return to the previous instruction

References to other instructions are active links to those instructions

6. Click (in the middle of the third paragraph of 2.3.2.1) on the link to **2.3.4**
7. Click on the browser “**Back**” arrow to return to the previous instruction.

Examples are labeled and presented on a dull yellow background.

8. Scroll down to the **example at 2.3.2.3**

Exceptions to an instruction are presented with a label and a left margin mark, both in green.

9. Scroll down to the **exception at 2.3.2.5** for serials and integrating resources

Alternatives or options related to an instruction are presented with a label and a left margin mark, both in green.

10. Scroll down to the **optional addition within 2.3.2.6**

Synch TOC

Synch TOC |

If you've lost track of where you are in the content after scrolling or following links, you can click on the "Synch TOC" button at the top of the reading pane. The content of the reading pane doesn't change, but the Browse Tree changes to show where you are in the RDA content, with the rule you are viewing displayed in **bold**.

For example, we have now navigated more deeply into the next level of 2.3.2.

11. Click on **Synch TOC**

Browse Tree -- RDA Tab

The RDA tab contains the full RDA instructions. You will soon see the major divisions of RDA into "Attributes", "Primary Relationships," "Relationships to," and "Relationships between."

Chapter 0: Introduction

The RDA Toolkit is not meant to be read linearly, as was AACR2. As an online resource, it is designed to facilitate various means of finding the desired instructions: 'jumping in' via keyword searches, using the TOC to go directly to a known instruction, and following internal links to other instructions. As a result, it is not assumed that the user has read an earlier instruction providing context for subsequent instructions.

Therefore, you must first have a good understanding of **Chapter 0**, which addresses RDA from these perspectives:

- purpose and scope
- key features
- underlying FRBR and FRAD conceptual models
- governing objectives and principles
- structure
- core elements
- access points
- alternatives and options
- exceptions
- examples
- internationalization

What follows is a sampling of key parts of the Introduction; it is not meant to be comprehensive.

1. Collapse the RDA hierarchy to **display the first level**
2. Click on the **plus sign (+)** in front of **0: Introduction**
3. Click on **0.0 Purpose and Scope**
Here you can find a review of the FRBR and FRAD user tasks
4. Click on the link to **LCPS**
This LCPS is indispensable for making decisions related to mode of issuance and the number of records to be created. Note the statement beneath the title of the LCPS.
5. Click on the blue **RDA** link to return to the RDA instruction
6. Click on **0.2 Relationship to Other Standards for Resource Description and Access**
7. Click on the link to **LCPS**

This LCPS is particularly important for those of you who catalog what we used to call “Special Formats.” The essence of the LCPS is that in certain situations you should follow your specialized instructions rather than RDA.

8. Click on the blue [RDA](#) link to return to the RDA instruction
9. Click on **0.3 Conceptual Models Underlying RDA**
You will be exploring the FRBR/FRAD conceptual models -- especially the “WEMI” entities (work, expression, manifestation, item) -- in separate training sessions
10. Click on **0.5 Structure**
You might find this narrative explanation of the structure of RDA to be a helpful complement to expanding the RDA Browse Tree hierarchy
11. Click on **0.6 Core Elements**
LC has made its own decisions about Core Elements, stating positions on some elements and adding other elements to the ‘core’ list. 0.6.1 provides a brief general overview of ‘coreness.’ You should follow LCPSs for decisions related to specific RDA elements.
12. Click on **0.9 Exceptions**
13. Click on the link to [LCPS](#)
Note this explicit guidance for the cataloging of rare books.
14. Click on the blue [RDA](#) link to return to the RDA instruction
15. Click on **0.10 Examples**
The essence of this instruction is expressed in the first paragraph: “The examples in RDA ... illustrate only the data that are addressed by that [specific] instruction.”

Exercise 1. Following links to LCPS

“Where do I find the instructions on recording the pagination of a single-volume book?”

Which chapter is devoted to the rules for books? _____

Is pagination an “attribute” or a “relationship”? _____

5. Click on the **plus sign (+)** in front of “**Recording Attributes of ...**”

Is pagination an attribute of “Manifestation & Item” or “Work & Expression”? _____

6. Click on the **plus sign (+)** in front of **Section 1**

Which chapter of Section 1 addresses what AACR2 calls “physical description”? _____

7. Click on the **plus sign (+)** in front of **3: Describing Carriers**

Which of these attributes is used to describe pagination? _____

8. Click on the **plus sign (+)** in front of **3.4: Extent**

9. Click on the **plus sign (+)** in front of **3.4.5: Extent of Text**

10. Click on **3.4.5.2 Single Volume**

11. Scroll down to the examples and determine what is different from AACR2

What can you not do under RDA? _____

Is there an LCPS on this instruction? _____

Where do you look for instruction if the volume has complicated or irregular paging?

12. Navigate to the **relevant instruction**, either by **scrolling down** in the document pane or by clicking on **3.4.5.8** in the Browse Tree

13. Click on the green [LCPS](#) link at 3.4.5.8

What is the LC Policy? _____

14. Click on the blue [RDA](#) link to return to the RDA instruction

Exercise 2. Following links to related RDA instructions

“Where do I find the instructions on recording the ‘creator’ of a work?”

Sometimes, you need to consult instructions in several sections of RDA. For example, to provide an access point for a person as ‘main entry’, you need to determine:

- Which person deserves the main entry?
- How do I construct the access point?
- In AACR2, you would answer these questions by consulting Chapter 21 (for “choice”) and Chapter 22 (for “form” of personal names)
- In RDA, you consult instructions that answer these questions:
 - What is meant by ‘creator’?
 - How do I record the creator?
 - Do I provide an access point for the creator?
 - How do I construct the ‘authorized access point’?
 - How do I determine the ‘preferred name’ for the person?
 - What other elements are included in the authorized access point for the person?

These questions would take you to chapters 19, 18, and 9 of RDA. You can use the internal links to move quickly through the decision process.

1. **Collapse** the RDA Browse Tree **to the first level**

Is creator an “attribute” or a “primary relationship ...” or a “relationship to” something, or a “relationship between” something?

2. Click on the **plus sign (+)** in front of **“Recording Relationships to ...”**

Is this relationship to a person, family, & corporate body, or to a concept, object, event & place?

3. Click on the **plus sign (+)** in front of **Section 6: Persons, Families & Corporate Bodies**

Is ‘creator’ a concept related to a work, or an expression, or a manifestation, or an item?

4. Click on the **plus sign (+)** in front of **19: Persons, Families and Corporate Bodies Associated with a Work**

5. Click on **19.2 Creator**

Note that Creator is a Core Element, and that there is a related LCPS.

6. Click on the green **LCPS** link and read the policy statement

7. Click on the blue **RDA** link to return to the RDA instruction

8. Scroll down to **19.2.1.3** and read the instruction on recording creators

9. Click on the link to **18.4** for the general guidelines

10. Scroll down, or follow the link, to **18.4.1.2** for instruction on *providing* the access point

11. Click on the link to **9.19.1** for instruction on *constructing* the access point for a person

12. Click on the link to **9.2.2** for instruction on choosing the preferred name of the person

13. Click on **Synch TOC**

14. **Expand** the hierarchy for **9.2.2** and scroll down to see the full set of instructions on preferred name

15. **Collapse** the hierarchy for **9.2** and note the other instructions for identifying persons

Exercise 3. Using the RDA Table of Contents

“Where do I find instructions on recording the title in a compilation of two or more works?”

You may find it preferable to scroll through the RDA Table of Contents and follow links to the instructions you need to consult. A potential advantage of this approach is that you can see the first-level divisions of RDA without needing to expand the hierarchy. On the other hand, this is most effective once you have an understanding of how RDA is structured -- for example, you know that “title” is covered somewhere in “Chapter 6, Identifying Works and Expressions.”

1. Click on **Table of Contents** in the Browse Tree
Note that the TOC is broken down only to the first level (i.e., x.x) and cannot be expanded.
2. Scroll down (or drag the scroll bar) and click on the link to **6.2 Title of the Work**
3. Click on **Synch TOC**
4. **Expand** the hierarchy for **6.2 Title of the Work**
5. **Expand** the hierarchy for **6.2.2 Preferred Title for the Work**

Which of these instructions addresses compilations?

6. **Expand** the hierarchy for **6.2.2.10**
7. Click on **6.2.2.10.3**
8. Scroll down and click on the link to view the **LCPS** on the alternative

Note that the Browse Tree jumps to the “Resources” tab.

9. Click on the **RDA** tab

Note that you are still at the last instruction you consulted.

Exercise 4. Using the RDA Glossary and Index

“Where can I find a definition of “carrier type,” and instructions on recording it?”

1. **Collapse** the Browse Tree hierarchy
 2. **Expand** the **Glossary**
 3. **Expand** the “C” portion of the Glossary
 4. Click on **Carrier Type**
 5. **Collapse** the **Glossary**
 6. Scroll down and click on **Index**
- Note that the Index hierarchy is not broken down further*
7. Scroll down to the “C” terms and click on **Carrier Type**
 8. Click on the link to **3.3**
 9. Scroll down to **3.3.1.3** to view the proper terms to use

Brain Teaser: How would you find the answer to this question?

“What is the difference between the RDA concepts of “creator” and “contributor”?”

A creator is responsible for the creation of a _____

A contributor contributes to the _____

How did you find the answer? _____

Bonus question: Can an entity contribute to something that has not yet been created? _____

Browsing AACR2 and LCPS Directly

Some catalogers may find it helpful during the transition to start with a specific AACR2 rule number which they know well, and linking from it to the RDA instruction.

Exercise 5. Jumping from a known AACR2 rule to the related RDA instruction

“What is the RDA companion to the AACR2 rule for corporate main entry?”

1. Click on the **Resources** tab
2. **Expand AACR2**
3. **Expand Part II**
4. **Expand 21: Choice of Access Points**
5. **Expand** the hierarchy and click on **21.1B2**
6. Click on the blue **RDA** link, which takes you to 19.2.1.3
7. Scroll down to the examples that start with **“Works of an Administrative Nature”** and look at the subsequent groups of examples

Does this rule look pretty familiar? How is the instruction different from the AACR2 rule?

8. Click on **Synch TOC** to see where this instruction fits in the larger RDA context
It’s within the instructions on creators of works.

Exercise 6. Going directly to an LCPS

“I know there is an LC Policy Statement on recording Ordinal Numbers, but I can’t remember what it says. I do know where it is.”

1. Click on the **Resources** tab
2. **Collapse and expand** the Browse Tree as needed to **display LCPS to the chapter level**
Which chapter covers ordinal numbers? (hint: this is an attribute of a manifestation)
3. **Expand RDA 1: General Guidelines on Recording Attributes of Manifestations and Items**
4. Click on **LCPS for 1.8.5 Ordinal Numbers**
5. Click on the blue **RDA** link to view examples
6. Click on **Synch TOC**

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Unit 3: Searching

Document Menu



The tools of the Document Menu -- circled in the image above -- are valuable whether you are searching or simply browsing. From left to right, the tools are:

Previous Hit and Next Hit

These icons allow you to browse forward and backward among search results to the previous and next hits *within the same chapter*. They are colored when active.



Synch TOC

We have already seen that “Synch TOC” is a useful way to regain focus and context after you have been scrolling and linking.

Return to Search Results

You can click on this to return to the most recent set of search results, after you have followed a hit to its location in the document. This button is only active once you have performed a search.

View Text

The View Text menu allows you to limit the document display in several ways. When you select any option other than “Full”, you see the label shown at the right. The current selection appears in *slightly bolder* text.



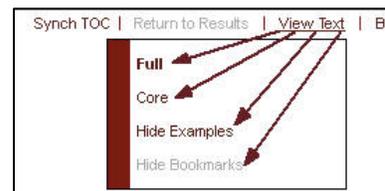
You should still be at RDA Instruction 2.11.1.3

1. Click on **View Text**

Full is the default, and displays the entire document.

2. Click on **Core**

The document jumps to the beginning of the current chapter (it's not clear why) and now displays only 'core' instructions.



Core in this instance does not indicate “Core Element” in the RDA data model, but rather an instruction which the JSC views as core to understanding RDA.

3. Click on **View Text > Full**

4. Click on **View Text > Hide Examples**

5. Click on **2.11.1.3 in the Browse Tree**

Notice that the yellow example boxes do not display.

Hide Examples can be helpful when you just want to read the instructions, uninterrupted by the examples.

6. Click on **View Text > Show Examples**

Hide Bookmarks is grayed-out here because we are not on an instruction with a bookmark. Selecting this hides the visual indicator that a bookmark is present. If you are on an instruction with a bookmark, the menu toggles between “Hide Bookmarks” and “Show Bookmarks.”

Bookmark

We will work with Bookmarks later.

Print Text

Clicking on this function provides only a very limited printing option. The document opens as a “PDF” document in a separate window, and you can then click on the PDF “Print” icon to print either the entire Chapter of RDA (or LCPS, or AACR2, etc.), or specified pages of that chapter.

- But try this quicker approach:
 - In the document pane, highlight the text you want to print (perhaps a single rule?)
 - Click on the Browser print icon
 - On the “Print” dialog, choose “Selection”
 - Click on OK

Searching Basics

Specific terms and phrases

- When searching for a specific phrase, enter it as it appears in the text of an RDA instruction. For example, the word “Record” generally precedes instructions which detail how to enter a specific data element into the record; using it in your search phrase will help filter out Scope and other background statements quickly.
- When searching for a specific data element, enter it as it appears in the RDA Element Set View, rather than more colloquial uses for the term. For example, using “Carrier Type” in your search phrase instead of “Carrier” will yield a narrower set of results.
- To search for all references to a specific instruction, enter the instruction number in quotation marks. A search results list will be retrieved.

Search syntax

- To search for an exact phrase, enter it in quotation marks. For example, “**Carrier Type**” will retrieve the phrase **Recording carrier type**, but not the phrase **type of carrier**.
- To search for all words in any order, enter the phrase without quotation marks. For example, **Carrier Type** will retrieve both “Recording carrier type” and “type of carrier.”
- Use Boolean operators as needed. These include: “and”, “not”, “or”, and “w/#” (where # is a number indicating the desired proximity between the two words). Using multiple words in a search without any Boolean operators is processed as an “and” search; e.g., **copyright date** and **copyright and date** will retrieve the same results.
- Use the asterisk (*) to indicate truncation. For example, **abbreviat*** will retrieve “abbreviate,” “abbreviated,” “abbreviation”, and “abbreviations.”

Web search engine basics

- Searching is not case-sensitive.
- Punctuation is not important; **entities.** and **entities** will retrieve the same results.
- Spacing *is* important; **access point** and **accesspoint** will not retrieve the same results.

Sorting of search results

Search results are sorted by relevance. Relevancy rankings are calculated on the number of occurrences within a document and the relative position of each hit within the document (i.e., does it occur in a heading or a paragraph?).

RDA Quick Search



The quickest, most direct searches are by RDA Instruction Number or by keyword(s).

Exercise 7. Searching by instruction number

1. Click in the **RDA Quick Search box**
2. Type **6.2.2.10**
3. Press **<Enter>**

You are placed at the rule, “Recording the Preferred Title for a Compilation of Works”

4. Click on **Synch TOC** to see the hierarchical context for this instruction

➤ The punctuation for this search is very literal. You must include the periods which distinguish sub-sections of instructions. Do not use other punctuation such as slashes, commas, or spaces; you will retrieve very different -- any perhaps many more -- results.

Tips:

- You can quickly get to the beginning of a chapter by searching for the “.0” instruction of that chapter (e.g., “6.0”).
- If you put quotation marks around your search term (i.e., “6.2.2.10”), you will retrieve, in addition to the specific instruction, all hits which reference the instruction.

Exercise 8. Searching by keyword

1. Click in the **RDA Quick Search box**
2. Type **frequency**
3. Press **<Enter>**
4. Click on the hit **2.14**, which appears to be the base instruction
5. Click on **Return to Results** to determine if you need to consult any other instructions

Note that there are 17 results, several of them in the Glossary or Index (listed at the bottom).

6. Click on the **first hit** in the results list
7. Click on the **Next Hit icon a few times** to see that this does advance through hits in rule-number order, and also that there are more than 17 hits, because the term appears several times in certain ‘results’; ‘hits’ and ‘results’ are not the same thing. Put another way: the first ‘result’ may not be the first ‘hit.’
8. Click on **Synch TOC** to see the context for the current instruction

Exercise 9. Multiple-term searching

How does the use of multiple terms affect my search?

1. Click in the **RDA Quick Search box**
2. Type **compilation**
3. Press <**Enter**>

You retrieve results for “compilation of works” (which we do want), but also compilation of musical excerpts, laws, treaties, etc. -- a total of 54 results.

4. Click in the **RDA Quick Search box**
5. Type **compilation works**
6. Press <**Enter**>

You now retrieve only 25 results, and they are more on target. But we want to find the instruction for a compilation of non-musical works in one form

7. Click in the **RDA Quick Search box**
8. Type **compilation works form**
9. Press <**Enter**>
10. Click on the **first result**

Advanced Search



The Advanced Search is accessed by clicking on the text ‘button’ on the User Menu. The Advanced Search allows you to refine or limit your search in several ways:

- Search by the AACR2 rule number
- Specify which documents are to be searched -- or which *sections* of those documents
- Exclude examples from the scope of a search
- Narrow a search by choosing from among the different instruction types

The Advanced Search also

- allows you to save a search (we will cover this in the next unit)
- remembers your last search -- so it allows you to ‘build’ searches (like the one above)

Exercise 10. Searching by AACR2 rule number

You may find it useful to search RDA for a known AACR2 rule number, and let RDA coding ‘behind the scenes’ lead you to the related instruction(s) in RDA.

For example, if I want to know where in RDA I would find the instruction on **changes in title proper for a serial**, a search by AACR2 rule number can be very efficient.

1. Click on the **Advanced Search** button

Note that RDA is already selected in the “Select Document(s) to Search” box

2. Click on **Clear Previous Search**
3. Type **12.1b8** in the “AACR2 Rule Number” box
4. Click on the **Search** button (or press the <**Enter**> key)

The Results List shows that this AACR2 rule has two relevant rules in RDA

5. Click on the result for **Serials**

Exercise 11. Specifying which documents are to be searched*How can I find the instructions on how to record a person as creator?*

1. Click on the **Advanced Search** button (not the header above the search results)
2. Click on **Clear Previous Search**
3. Type **person creator** in the search box
4. Click on **Search**

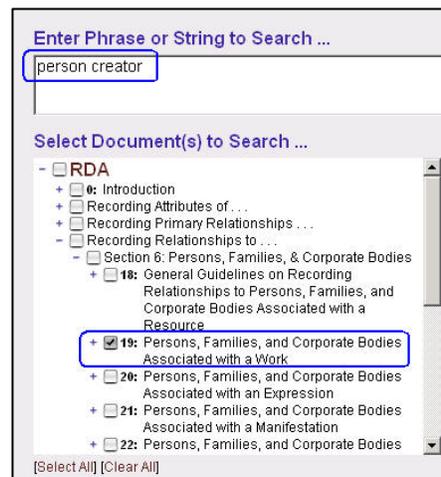
The Results are from various parts of RDA -- Chapter 19 (how to record), Chapter 18 (core elements), Chapter 6 (collaborative works), the Appendices (relationship designators) ... and even a result in the Introduction. I just want to see the instructions on recording the relationship of a person to a work.

5. Click on the **Advanced Search** button

The default is to search all of RDA.

6. **Uncheck the box in front of RDA**
7. **Expand** the hierarchy and check *only* the box in front of **Chapter 19** (it's in Section 6)
8. Click on **Search**

There are now only three hits -- all in Chapter 19.

*How can I find both the RDA instruction and the LCPS on “Work Manifested”?*

1. Click on the **Advanced Search** button
2. Click on **Clear Previous Search**
3. Type **work manifested** into the search box
4. Check the boxes in front of both **RDA** and **Library of Congress Policy Statements**
5. Click on **Search**

You can go directly to the one result in the LCPS.

Exercise 12. Excluding examples from the scope of a search*How can I find a term only in an instruction? I don't want to see hundreds of examples*

1. Click on the **Advanced Search** button
2. Click on **Clear Previous Search**
3. Type **creator** in the search box
4. Check the boxes in front of both **RDA** and **Library of Congress Policy Statements**
5. Click on **Search**
6. Click on the **first result** and then advance using “**Next Hit**”

There are only 30 “Results,” but there are many more “Hits” -- every example in 19.2, all of which include the phrase “Authorized access point representing the creator.” Worse, it may take you a long time to get to the instruction itself.

7. Click on the **Advanced Search** button
8. Click on **Exclude Examples**
9. Click on **Search**
10. Click on the **first result** and then advance using “**Next Hit**”

There are seemingly only a few less “Results,” but now you won't stop on every example.

Exercise 13. Narrowing a search by Instruction Type

How can I search for a term appearing only in certain instructions?

To further narrow your search, you can specify the type of instructions to be searched, by selecting from the drop-down menus on the “Advanced Search” dialog. These menus take advantage of behind-the-scenes coding which tags instructions as belonging to one or more of the “instruction types.”

Note: You can select from more than one of these filter menus for a single search.

RDA Instruction Types (RDA Only)

- All Instruction Numbers
- All Description Types
- All Content Types
- All Media Types
- All Issuance Types
- All Work Types

All Instruction Numbers

Accept this default, or limit the search to:

- **Core**
- Remember that “Core” does not indicate “Core Element” in the RDA data model, but rather an instruction the JSC considers “core” to understanding RDA.

All Instruction Numbers

All Instruction Numbers

Core

All Description Types

Accept this default, or limit the search to:

- Analytical
- Comprehensive
- Hierarchical

All Description Types

All Description Types

Analytical Only

Comprehensive Only

Hierarchical Only

All Content Types

Accept this default, or limit the search to:

- Cartographic
- Computer dataset
- Computer program
- Movement
- Moving image
- Music
- Still images (visual or tactile)
- Tactile (movement, music, still image, text, or three-dimensional form)
- Text (notated, spoken, or tactile)
- Three-dimensional forms (visual or tactile)

All Content Types

All Content Types

Cartographic Only

Movement Only

Moving Images Only

Music Only

Still Images Only

Tactile Only

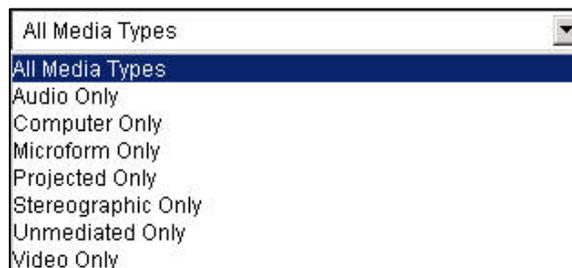
Text Only

Three-Dimensional Forms Only

All Media Types

Accept this default, or limit the search to:

- Audio
- Computer
- Microform
- Projected
- Stereographic
- Unmediated (content designed to be perceived directly through one or more of the human senses without the aid of an intermediating device)
- Video

***All Issuance Types***

Accept this default, or limit the search to:

- Integrating resources
- Multipart monographs
- Serials
- Single units

***All Work Types***

Accept this default, or limit the search to:

- Legal
- Musical
- Official communications
- Religious



We will do a few quick searches using these filters, so you can get a general idea of their usefulness. This is not meant to be comprehensive training in limiting by Instruction Type.

1. Click on the **Advanced Search** button
2. Click on **Clear Previous Search**
3. Type **preferred title** in the search box
4. Click on **Search**

There are 256 results -- too many to look through, and I only want those related to moving image resources. I could include the term "moving" to narrow the search...

5. Click on the **Advanced Search** button
6. Search for **preferred title moving** in the search box
7. Click on **Search**

There is only one result -- but it is not really what I want.

8. Click on the **Advanced Search** button
9. Remove **moving** and search for only **preferred title** in the search box
10. Select **Moving Images Only** from the "All Content Types" menu
11. Click on **Search**

I now retrieve a key additional result, a chapter 6 instruction on constructing the authorized access point for a collaborative work (a motion picture is generally a collaborative work)

12. Click on the result for **6.27.1.3**
13. Click on the **Next Hit** arrow until you see the instruction that applies specifically to “motion pictures.”

Q. Why was this result -- the one that really helps us -- not retrieved by the previous search?

A. The term “moving” does not appear with the term “preferred title” in 6.27.1.3, as we requested by doing an implied “AND” search. We searched *too* narrowly.

Q. But if the term “moving” does not appear with the term “preferred title” in 6.27.1.3, why was that instruction retrieved by the second search?

A. We did not include the term “moving” in our search syntax. We only specified that we wanted to find the term “preferred title” in an instruction that relates to moving images. Note that that exact term does not appear in the instruction (the term is “Motion Pictures”); the programmers used their human intelligence to flag this instruction as relating to “Moving Images”.

Q. Why are there hits in 6.27.1.3 not specific to motion pictures?

A. Because the entire instruction has been identified as relevant to motion pictures, the search will retrieve all instances of the term “preferred title” in this instruction.

1. Click on **Advanced Search**
 2. Click on **Clear Previous Search**
 3. Type **sources** in the search box
 4. Click on **Search**
- Yikes! 474 hits! I only want those related to computer resources. I could include the term “computer” to narrow the search...*
5. Click on **Advanced Search**
 6. Search for **sources computer** in the search box
 7. Click on **Search**

There are only two results -- but they do not include the instructions in 3.19, which relate to the sources for carriers and digital file characteristics.

8. Click on **Advanced Search**
9. Remove **computer** and search for only **sources** in the search box
10. Select **Computer Only** from the “All Media Types” menu
11. Click on **Search**

The results now include instructions on the sources for such elements as resolution, transmission speed, file size, encoding format, file type, etc.

12. Click on **any of the 3.19 results** and advance using “**Next Hit**”

Do you see the word “Computer”?

Why did these searches work differently?

Save Search as ...

We will cover this feature in the next unit. This can only be done as part of personalizing the Toolkit, once you are logged in with your profile.

Unit 4: Personalizing the Toolkit

Creating a User Profile

In order to utilize several of the very useful features of the Toolkit -- notably, User Preferences, Bookmarks, and Saving Searches -- you need to be logged into your User Profile. This means going one step beyond the LC institutional login.

And in order to login to your User Profile, you first need to create a User Profile.

1. Click on **Create** in the User menu (just below the “Library of Congress” legend)
2. Complete the **dialog box** as illustrated in the example below.

Full Name:

Enter the name that will display in the upper right corner of the Toolkit Interface.

Profile Name:

Enter the Profile Name that must be entered to login to your profile

Email Address:

Enter your email address so the system can email you a password reminder if requested by you.

Password:

Enter a Password used to login to your profile.

Confirm Password:

Enter your Password again to ensure accuracy.

Your User Profile is currently inactive.

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

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

Full Name:
 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.](#)

- Remember the rules for passwords
 - No minimum or maximum number of characters
 - Not case sensitive
 - All ASCII characters are allowed. Non-Latin script characters are not allowed. Spaces are discouraged
3. Check the “I **agree** to the RDA Toolkit terms and conditions” box (to read these, click on the “terms and conditions” link).
 4. Click on **Create**
- Your name should now appear above “Library of Congress” in the blue banner at the top.*

Managing your User Profile

You can easily modify some of these profile settings, or utilize the personalizations.

1. Click on **My Profile** (in the User Menu)
 - In the upper portion of this dialog, you can update your profile details.
 - We will not do this in class
 - In the lower portion of this dialog, you can manage your Saved Searches and Bookmarks.
 - We do not yet have any of these to manage.

There is no explicit way to exit “My Profile.” Simply *go somewhere else* in the Toolkit.

2. Click in the **RDA Quick Search** box

Bookmarks

You may find yourself repeatedly consulting the same instructions, and want to go to them more quickly in the future -- just as bookmarks help you do in other material. You can create Bookmarks in the Toolkit, and then navigate quickly to them rather than browsing or searching.

Exercise 13. Creating bookmarks

1. Type **19.2**
2. Press <**Enter**>
3. Click on **Bookmark** in the Document Menu
4. Click on **Add** in the “Manage Bookmarks” dialog
5. Click in front of the instruction number **19.2.1**
6. Click in the “Bookmark Name” field and type **Creator**
7. (If you wish) Type a Bookmark Annotation
8. Click on **Set**

You should now see a graphic indicating that you have set a bookmark here.

Let's set a bookmark for the Appendix guidelines on Relationship Designators for Creators.

9. Click on the **Advanced Search** button
10. Click on **Clear Previous Search**
11. Type **creator** in the search box
12. **Un-check RDA** as a document to search
13. **Expand** the hierarchy for RDA and check **Appendices**
14. Click on **Search**
15. Click on the **first result**
16. Click on **Bookmark** in the Document Menu
17. Click on **Add** in the “Manage Bookmarks” dialog
18. Click in front of **architect**
19. Click in the “Bookmark Name” field and type **Creator rel des**
20. Click on **Set**

Let's do one more. Let's say you often have to find the LCPS on which name to choose for a corporate body if the name appears in different languages. You know this instruction relates to an "attribute" and is discussed somewhere in Chapter 11 of Section 3.

21. Click on the **Advanced Search** button
22. Click on **Clear Previous Search**
23. Type **form name language** in the search box
24. **Un-check RDA** as a document to search
25. **Expand** the RDA hierarchy and check **Chapter 11** (in Section 3)
26. Click on **Search**
27. Click on the result for **11.2.2.5.2**
28. Click on the link to the **LCPS**
29. Click on **Bookmark** in the Document Menu
30. Click on **Add** in the "Manage Bookmarks" dialog
31. Click in front of **LC practice for alternative**
32. Click in the Bookmark Name field and type **Corp body mult lang LCPS**
33. Click on **Set**
34. Click on the link to return to the **RDA** instruction

Exercise 14. Navigating to bookmarks

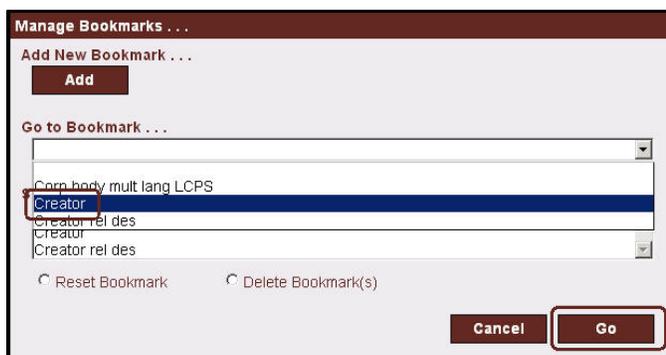
1. Click on **Bookmark**
2. Click on the **Go to Bookmark ...** drop-down menu

Note that the bookmarks are listed in alphabetical order (however, hyphens and other characters affect the order)

3. Select **Creator**
4. Click on **Go**
5. Click on **Bookmark**
6. Click on the **Go to Bookmark ...** drop-down menu
7. Select **Corp body mult lang LCPS**
8. Click on **Go**

Note that this takes you directly to the Bookmark -- even though the bookmark is in the LCPS.

9. Click on **Bookmark**
10. Click on the **Go to Bookmark ...** drop-down menu
11. Select **Creator rel des**
12. Click on **Go**



From this dialog you can also Reset -- move to another location -- or Delete a bookmark. But you cannot "rename" a bookmark, although the dialog suggests that you can "Edit" them.

- You can also access your Bookmarks from the "My Profile" screen. But there you can only jump to or delete bookmarks; you cannot reset or create bookmarks.
- If you want to rename a bookmark, you need to delete it and re-create it with a new name.

Saving Searches

This feature can be useful in situations similar to those for which we found Bookmarks to be useful -- you've searched your way to an instruction you think you'll need to consult again (maybe frequently), and you don't want to re-create your search syntax.

You might find "Bookmarks" to be more useful for jumping quickly to frequently-consulted instructions, and "Saved Searches" to be more useful when you've done a complicated search, or finally found the correct instruction after trying several strategies, and you think you might need to perform the same search in the future -- even if not frequently. Another potential advantage of "Saved Searches" is that the search terms are highlighted in the results.

Another possible scenario:

Sometimes it is difficult to determine when an instruction concerns how to record an element generally and when it concerns how to construct an access point. For such cases, a bookmark would always take you to the same single instruction. But you could save a more broad search that yields a broader set of results, and then sometimes view one result and sometimes another.

Exercise 15. Saving a search

1. Click on the **Advanced Search** button
2. Click on **Clear Previous Search**
3. Type "**period of activity**" in the search box (include the " " to search it as a phrase)
4. Make sure that **RDA** has been checked as a document to search
5. Click on **Search**

The search yields 10 results, found in two parts of Chapter 9 -- 9.3 for general guidelines and 9.19 for specific instructions on constructing an access point -- and a few in the Appendices.

6. Click on **Advanced Search**
 7. Type "**period of activity**" "**access point**" in the search box (include both sets of " ")
- The search yields 3 results, all in 9.19, about constructing access points for personal names*

You don't want to recreate this search every time, and you don't want to create a bookmark for 9.19.1.5 Period of Activity of the Person because you may want to also see the references to it in 9.19.1.6 and 9.19.1.7.

Instead, you can save the search, and then decide each time which result(s) to view.

8. Click on the **Advanced Search** button
9. Type **period activity access point** in the "Save Search as ..." box
10. Click on **Search**

This saves it and performs the search again.

Note: If you had foreseen that sometimes you want to see the 9.3 instructions, and sometimes those in 9.19, you might have saved the previous, broader search.

The screenshot shows the 'Advanced Search' interface. At the top, there are tabs for 'RDA Quick Search' and 'Advanced Search'. Below the tabs is a search box containing the text "period of activity" "access point". To the right of the search box is a 'Clear Previous Search' link. Below the search box is a section titled 'Select Document(s) to Search ...' with a list of document types: RDA (checked), RDA: Element Set View, RDA Mappings, Workflows, Mappings, Entity Relationship Diagram (ERD), AACR2, and Library of Congress Policy Statements (LCPS). To the right of this list is a section titled 'Select Meta Data to Limit' with a list of options: Exclude Examples (checked), AACR2 Rule Number (RDA C), and RDA Instruction Types (RDA). Below this list are several buttons: All Instruction Numbers, All Description Types, All Content Types, All Media Types, All Issuance Types, and All Work Types. At the bottom of the interface, there is a 'Save Search as ...' box containing the text 'period activity access point' and a 'Search' button.

Another scenario:

You want to view the instructions on recording the preferred title for musical works. These instructions are found in 6.14, but the general guidelines on preferred titles are found in 6.2 -- and you also want to be sure to retrieve the related (and more specific instructions) in 6.15 (medium, solo, choral, instrumental, accompaniments, etc.) and 6.16-6.18.

Obviously, you don't want to bookmark a single instruction.

11. Click on the **Advanced Search** button
12. Click on **Clear Previous Search**
13. Type "**preferred title**" musical in the search box
14. Make sure that **RDA** has been checked as a document to search
15. Click on **Search**

The result is 37 results, but they do not include those in 6.15-6.18.

16. Click on the **Advanced Search** button
17. Delete **musical** from the search box
18. Make sure that **RDA** has been checked as a document to search
19. Select **Musical Only** from the last menu of RDA Instruction Types (which now reads "All Work Types")
20. Type **preferred title** in the "Save Search as ..." box
21. Click on **Search**

The result is 48 results, which include the broader instructions. And the search has been saved.

Exercise 16. Making use of saved searches

1. Click on **My Profile**
2. Scroll to the lower half of the screen and click on the saved search **period activity access point**
3. Click on **My Profile**
4. Scroll to the lower half of the screen and click on the saved search **preferred title**
5. Click on **My Profile**
6. Scroll to the lower half of the screen and click on **Edit** after **period activity access point**
7. Click in the box to expand the scope of the search to include **LCPS** documents
8. Click on **Search**
9. Click on **My Profile**
10. Scroll to the lower half of the screen and click on **Rename** after **preferred title**
11. Type **preferred title (music)** to provide a more clear name for the saved search
12. Click on **Rename**

Bonus exercise to try on your own:

Save a search for **manuscript title** in **RDA**, **AACR2**, and **LCPS**

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Unit 5: User-Contributed Content

User-contributed content allows users to create, share, copy, and modify their own content in the RDA Toolkit. This content could take several forms:

- local workflows
- local policies
- mappings to encoding standards
- local training guides
- individually-created ‘job aids’

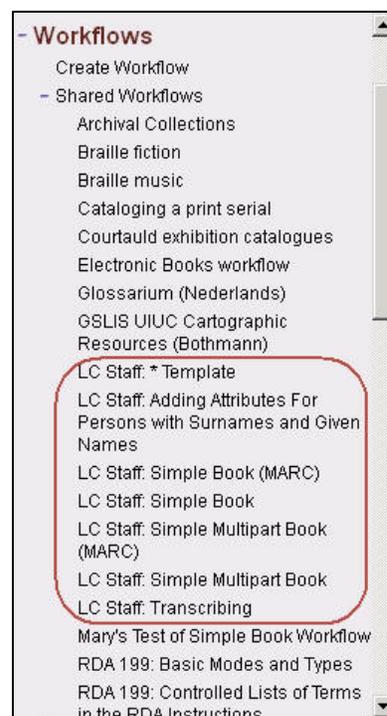
The Toolkit ‘comes with’ two categories of such content: workflows and mapping. In this course, we will look briefly at existing workflows and mappings, but will not create our own.

Workflows

Catalogers routinely create workflows for cataloging different types of items. Workflows in the RDA Toolkit provide an online repository of these workflows for personal, institutional, and global reference, eliminating the need to leave the RDA Toolkit to reference local documentation and providing the ability to link from local documentation directly to RDA instructions.

Workflows are step-by-step instructions for performing an aspect of cataloging, whether a specific part of a record or a complete record. You can include active links to RDA instructions and to other resources. You also specify if you wish to share the workflow with others at LC (“Subscription”) or with anyone using the Toolkit (“Public”). Workflows may be helpful to catalogers making the transition from AACR2 to RDA, to catalogers who need to catalog a type of resource they’ve not cataloged before, and to persons who have not cataloged at all.

Shown at the right are some of the workflows users have already created. Carroll Davis, an experienced cataloger detailed to the Policy and Standards Division (PSD), has created the workflows which are highlighted.



For grouping purposes, it is important to standardize how the shared workflows are named by indicating the institution’s name at the beginning of the workflow name.

- You are welcome to utilize the Workflows -- even those not created by LC -- to the extent you find them beneficial. If you have ideas or interest in creating a workflow that you and your LC colleagues or you and your specific-constituency colleagues outside LC would like to see in the Toolkit, please contact PSD so you and PSD can determine how to develop that workflow. If you want to put any personal reminders or ‘job aid’ in the Toolkit for easy access, please ensure that the document is marked ‘private.’

Exercise 17. Exploring Workflows

1. Click on the **Tools** Tab
2. **Expand** the hierarchy down to **Shared Workflows**
3. Scroll down and click on **LC Staff: Transcribing**
This Workflow is a useful one-stop compilation of all the RDA instructions on transcription. This particular Workflow includes a hyper-linked “Table of Contents”; but all are different.
4. Click on the jump-link to **Language and Script**
5. Read the first paragraph and then follow the link to **RDA 1.4**
6. Click on the **Tools** tab in the Browse Tree to get back to the Workflow
7. Scroll down to the “Capitalization” section and follow the link to **LCPS 1.7.1**
8. Click on the **Tools** Tab to return to the Workflow
This Workflow is primarily concerned with general principles. To see one that walks you through the process ...
9. In the Tools Browse Tree, click on **LC Staff: Simple Book**
10. **Browse through this workflow** to see that it presents a step-by-step ‘tutorial’, complete with links to the relevant RDA instructions
11. In the Tools Browse Tree, click on **RDA 199: Relationship Designators**
Note that although this is not an “LC” workflow, it contains valuable content.
12. Scroll down and click on **MARC21 Bibliographic Mappings for RDA 18.5**
Note that this jumps you to the resource for mapping RDA to MARC, which is on the Tools tab
13. Click on the **Back button** of the Browser Navigation Bar to return to the Workflow

Mappings

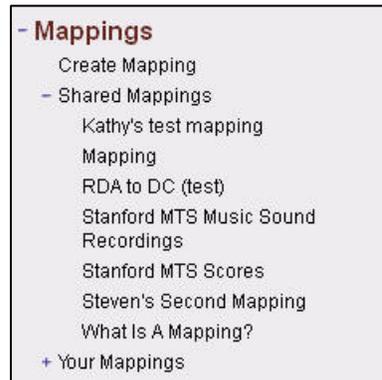
Mappings are tools created by Toolkit users to supplement the RDA Mappings authorized by the Joint Steering Committee, which we navigated briefly in Unit 2.

- Some of you may find these Mappings helpful, and others may not. As with the Workflows, do not *create* Mappings without first consulting PSD. If you see omissions or errors in any of the mappings in the Toolkit, please notify PSD; the JSC is continuing to update those mappings.

In this class, we will simply navigate through the mappings that exist -- incomplete as they are.

Exercise 18. Exploring Mappings

1. **Collapse the Workflows hierarchy**
2. **Expand** the hierarchy down to **Shared Mappings**
3. Click on **What is a Mapping?** for a very general explanation of mappings
4. Click on **RDA to DC (Test)** for a more useful mapping of *some* specific RDA instructions to the Dublin Core elements
5. Click on **Stanford MTS Scores** for a more robust mapping of the MARC data likely to be encountered in records for music scores, to the corresponding RDA instructions, with examples and notes



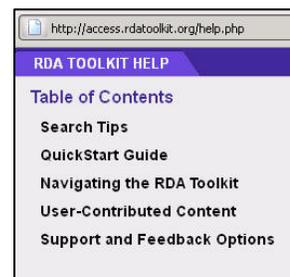
Unit 6: Help, Support, and Other Resources

The instructor will lead you through a brief overview of the Help and Support that are available. You can either follow along or simply observe the demonstration.

RDA Toolkit Help

Clicking on the “Help” link at the bottom of the Toolkit Browse Tree opens a separate window with a Table of Contents of five different Help topics. Most of these topics are covered in greater detail elsewhere in this document.

Note that you can print a topic from the icon in the blue bar at the top. Because “Help” is a separate window, you can browse through it without losing your place in RDA or other resources.



Support

Clicking on the “Feedback” link at the bottom of the Toolkit Browse Tree displays the “Welcome to the Support Center” page in the document pane at the right. From this page, you can open a new “ticket” to send a question to ALA; note that the free-form text boxes allow you to phrase your question in detail. You can also check on the status of existing ‘tickets.’

➤ You can also get to this page by clicking on “Support” from the User Menu at the top.

Toolkit Home Page

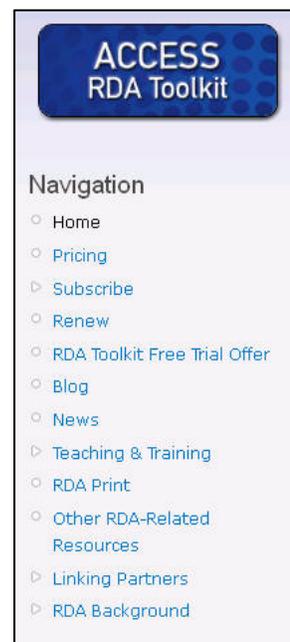
You can also find Helpful information from the Toolkit Home Page, by clicking on the logo in the upper left corner of the interface, above the Browse Tree. Below are brief descriptions of a few of the sub-pages accessible from the frame at the left side of the home page

Blog

The Blog presents a variety of information, including the latest developments, interviews with Vendors, and ‘how-to’ advice.

You can use the Blog categories to look for information on a particular topic. You will probably find the “Tips in Three” useful (named after, but not related to, AACR2’s “rules of three,” which are not part of RDA).

You are encouraged to view the Blog frequently. If you wish to comment on posts, you will need to register, which takes only a few minutes.



Teaching and Training

Perhaps the most useful “help” on the RDA Home page is in the “Teaching & Training” group. Here, you can view archived webinars on the Toolkit and a comprehensive suite of short Video Help on Toolkit access, navigation and searching, and on User-contributed data. The User Guides help with do-it-yourself linking between MARC and RDA.



FAQ

Customer Service Frequently Asked Questions are available by clicking on the link at the top-right of the interface.

Help Coming Soon!

Virtual User Group

ALA Publishing is in the process of developing a Virtual User Group as a forum to solicit feedback from users and explain development plans to users. The VUG will generally follow a webinar format, intended for smaller groups and employing bidirectional communication. The audience is expected to be national libraries and “power users”. The goal is to offer VUG sessions quarterly in rotating time zones, and to offer multilingual sessions. It is envisioned that ALA will use the Blog to communicate plans and solicit feedback, and the subsequent discussions will take place in the Virtual User Groups.

Revised Help

ALA Publishing is in the process of re-writing the “Help” content to reflect changes in Toolkit content and procedures and to improve clarity.

Unit 7: Future Enhancements

The RDA Toolkit is a work in progress. RDA is itself still being refined, with revisions to instructions and to LCPSs. In addition, ALA product developers are constantly working on other refinements in response to user feedback. You can expect the Toolkit to continue to evolve. The instructor will demonstrate some of the future enhancements in the ‘staging’ Toolkit.

RDA Opens to Sections

When a user opens RDA, it will open directly to the “Sections”, not to the generic groupings to which it now opens. There is some benefit in seeing the generic groupings, in reinforcing the structure of “Attributes,” “Primary Relationships,” and “Relationships to”. But once you grasp that concept, the generic groupings result in an extra level of hierarchy and extra clicking.

Partial Chapter Loads

Some chapters in RDA (e.g., 6, 19) are extremely long and can take some time to load. These chapters will load in parts, and the partial loads will include blue links to the “Previous Page” and “Next Page.” A ‘page’ is determined by file size and logical connections between instructions.

Re-Sorting Search Results

By default, search results are displayed in “Relevance” order. As in Voyager, it is often hard to understand why a result is more “relevant” than another (the most relevant is the one that addresses your query). You will be able to re-sort a set of results by document order (i.e., instruction number). Further, you will be able to set this by default in “User Preferences.”

Redefinition of “Core” in Search Results

The current “View Text” options of “Full” and “Core” cause confusion. You should remember that “Core” in current Toolkit usage does not indicate a “Core Element” as in the RDA data model, but rather an instruction the JSC views as *core* to understanding RDA. In the future:

- “Full” will be changed to “All instructions”
- “Core” will be changed to “Basic instructions”
- “Core element instructions” will be added as another option

Accordingly, this change will be carried forward into related places, such as Advanced Searching by Instruction Type and in the labeling of search results.

Time-out Duration

Some users have found the default time-out to be insufficient to keep the Toolkit open for multi-tasking. However, ALA has a somewhat competing interest: insuring that users who want to log in are not ‘frozen-out’ by users logged in but not really using the Toolkit. You will be able to set a time-out duration in “User Preferences”. You could set this for as short or as long as you like, within a certain range. You are encouraged to be judicious in setting a time-out threshold.