

LC Summary of RDA Updates for April 2014 Update of the RDA Toolkit

This table highlights some changes to RDA for the April 2014 update due to constituent proposals approved by the JSC. These changes will appear with the “revision history” icon in the RDA Toolkit, and a full list of the changes is available in the RDA Toolkit at the bottom of the left-side navigation panel (RDA update history). The most important changes for LC catalogers are shaded in yellow below. Minor changes (e.g., edits to an instruction simply to change a reference that has been renumbered) are not noted in this listing.

RDA Instruction Number	Summary of Change
Chapter 0: Introduction	
Core Elements	
0.6.1	Reworded to clarify that one instance of a core element is required and subsequent instances are optional. For example, when a resource contains multiple content types, only the predominant content type must be recorded to fulfill the core element requirement, but the cataloger may record more than one. Also clarified that after satisfying the core requirement, a cataloger may give some but not all subsequent instances of the element. For example, for place of publication, the cataloger must give the first (or most prominent) place, but a cataloger can also give any (but not all) additional places of publication found on the resource, such as the first U.S. publisher for CIP required by LC-PCC PS for 2.8.2.
Chapter 1: General Guidelines on Recording Attributes of Manifestations and Items	
Punctuation	
1.7.3	Reorganized instruction and examples for omitting punctuation in transcribed elements.
Chapter 2: Identifying Manifestations and Items	
Titles of Parts, Sections, and Supplements	
2.3.1.7	Revised instruction, sub-instructions, and examples for recording titles of parts, sections, and supplements, and when they are sufficient or insufficient to identify the resource.
Collective Title and Titles of Individual Contents	
2.3.2.6	Reorganized to create sub-instructions for recording titles for comprehensive and analytical descriptions.
Scope (Alternative Chronological Designation of First Issue or Part of Sequence)	

RDA Instruction Number	Summary of Change
2.6.7.1	Added paragraph to indicate that a date in a different calendar is considered an alternative chronological designation.
	Scope (Alternative Chronological Designation of Last Issue or Part of Sequence)
2.6.9.1	Added paragraph to indicate that a date in a different calendar is considered an alternative chronological designation.
	Recording Production Statements
2.7.1.4	Deleted optional omission (moved to 2.7.4.3).
	Scope (Producer's Name)
2.7.4.1	Added paragraph to indicate that a producer's name may be represented by a characterizing word or phrase.
	Recording Producer's Name
2.7.4.3	Relocated optional omission to omit levels in a corporate hierarchy when recording a producer's name (formerly at 2.7.1.4) and added reference to recording the producer as a relationship in Chapter 21.
	Date of Production
2.7.6	Revised the core statement for date of production to indicate that if a date appears on the source in more than one calendar, only the date in the calendar preferred by the agency is required.
	Recording Date of Production
2.7.6.3	Added a new instruction for recording a date of production represented in more than one calendar.
	Recording Publication Statements
2.8.1.4	Added sentence for clarity. Deleted optional omission (moved to 2.8.4.3).
	Scope (Publisher's Name)
2.8.4.1	Added paragraph to indicate that a publisher's name may be represented by a characterizing word or phrase (e.g., Publisher to His Majesty).
	Recording Publishers' Name
2.8.4.3	Relocated optional omission to omit levels in a corporate hierarchy when recording a publisher's name (formerly at 2.8.1.4) and added reference to recording the publisher as a relationship in Chapter 21.
	Date of Publication
2.8.6	Revised the core statement for date of publication to indicate that if a date appears on the source in more than one calendar, only the date in the calendar preferred by the agency is required.
	Recording Date of Publication
2.8.6.3	Added a new instruction with examples for recording a date of publication represented in more than one calendar.
	Recording Distribution Statements
2.9.1.4	Added sentence for clarity. Deleted optional omission (moved to 2.9.4.3).
	Scope (Distributor's Name)
2.9.4.1	Added paragraph to indicate that a distributor's name may be represented by a characterizing word or phrase.
	Recording Distributors' Name

RDA Instruction Number	Summary of Change
2.9.4.3	Relocated optional omission to omit levels in a corporate hierarchy when recording a distributor's name (formerly at 2.9.1.4) and added reference to recording the distributor as a relationship in Chapter 21.
	Date of Distribution
2.9.6	Revised the core statement for date of distribution to indicate that if a date appears on the source in more than one calendar, only the date in the calendar preferred by the agency is required.
	Recording Date of Distribution
2.9.6.3	Added a new instruction for recording a date of distribution represented in more than one calendar.
	Recording Manufacture Statements
2.10.1.4	Removed the restrictions on when a manufacture statement could be recorded. Deleted optional omission (moved to 2.10.4.3).
	Scope (Manufacturer's Name)
2.10.4.1	Added paragraph to indicate that a manufacturer's name may be represented by a characterizing word or phrase.
	Recording Manufacturers' Names
2.10.4.3	Relocated optional omission to omit levels in a corporate hierarchy when recording a distributor's name (formerly at 2.9.1.4) and added reference to recording the distributor as a relationship in Chapter 21.
	Date of Manufacture
2.10.6	Revised the core statement for date of manufacture to indicate that if a date appears on the source in more than one calendar, only the date in the calendar preferred by the agency is required.
	Recording Date of Manufacture
2.10.6.3	Added a new instruction for recording a date of manufacture represented in more than one calendar.
	Copyright Date
2.11	Revised the core statement for copyright date to indicate that if a date appears on the source in more than one calendar, only the date in the calendar preferred by the agency is required.
	Recording Copyright Dates
2.11.1.3	Added an optional addition similar to other types of dates to record a Gregorian date in addition to a non-Gregorian or Julian date; also added new instruction for recording a copyright date represented in more than one calendar.
	Qualification (Manifestation Identifiers)
2.15.1.7	Examples updated
	Notes

RDA Instruction Number	Summary of Change
2.17-2.20	<p>In order to clearly separate notes on manifestations from notes on items (needed for work on the registry of RDA elements), instructions from 2.17-2.21 have been reconfigured and renumbered; the instructions themselves have not changed. New numbering:</p> <ul style="list-style-type: none"> 2.17 Note on Manifestation 2.18 Custodial History of Item 2.19 Immediate Source of Acquisition of Item 2.20 Identifier for the Item 2.21 Note on Item
Chapter 3: Describing Carriers	
3.21-3.22	<p>In order to clearly separate notes on manifestations from notes on items (needed for work on the registry of RDA elements), instructions from former 3.21 (Item-specific Carrier Characteristic) and former 3.22 (Note on Manifestation or Item) have been reconfigured and renumbered; the instructions themselves have not changed. New numbering:</p> <ul style="list-style-type: none"> 3.21 Note on Carrier 3.22 Note on Item-Specific Carrier Characteristics <p>Several new and revised examples in 3.22.1.3 and 3.22.2.3 may be useful.</p>
Chapter 6: Identifying Works and Expressions	
Two or More Parts (Preferred Title)	
6.2.2.9.2	Added a new example for the Alternative showing preferred titles for each part and <i>Selections</i> recorded.
Preferred Title Consisting Solely of the Name of One Type of Composition	
6.14.2.5	<p>Revised instruction to create new sub-instructions:</p> <ul style="list-style-type: none"> 6.14.2.5.1 Choice of Language 6.14.2.5.2 Singular or Plural Form <p>This instruction incorporates language from former LC-PCC PS about using a title in the preferred language of the agency creating the data when there is a corresponding cognate. Instruction about singular vs. plural form is reworded but unchanged from previous RDA practice.</p>
Medium of Performance	

RDA Instruction Number	Summary of Change
6.15.1.3-6.15.1.11	<p>These instructions have been substantially reorganized and changed. Note in particular:</p> <ol style="list-style-type: none"> 1) Individual instruments are recorded instead of standard combinations of instruments; 6.15.1.5 was deleted resulting in renumbering of subsequent sub-instructions 2) 6.15.1.6 Individual Instruments is now 6.15.1.5 Instruments 3) New sub-instruction 6.15.1.5.1 Number of Hands (content moved from 6.15.1.3) 4) New sub-instruction 6.15.1.5.2 Pitch and Range of Instruments (allows recording of pitch or range or may be omitted optionally) 5) New sub-instruction 6.15.1.5.3 Alternative Instruments 6) New sub-instruction 6.15.1.5.4 Doubling Instruments 7) 6.15.1.6 Accompanying Ensembles with One Performer to Part (former 6.15.1.5) has new Alternative to record individual instruments instead of ensemble term.
	One Treaty
6.19.2.7	<p><i>Treaties, etc.</i> is no longer used as the preferred title for a treaty. There are new instructions, including an order of preference, about recording the preferred title. Instruction renamed to remove “etc.” Note that several references and examples have changed throughout Chapter 6 as a result of this change and related changes.</p>
	Compilation of Treaties
6.19.2.8	<p><i>Treaties, etc.</i> is no longer used as the preferred title for a treaty. There are new instructions to record the collective name of the compilation as the preferred title if applicable and to apply the instructions at 6.2.2 if there is no collective name by which the compilation has become known. Instruction renamed to remove “etc.”</p>
	Date of a Treaty
6.20.3	<p>Renamed from “Date of Signing of a Treaty, Etc.” and 6.20.3.1-6.20.3.3 and substantially revised. The scope has been expanded to include other dates associated with the treaty (e.g. date of ratification) for use in this element. There are new instructions to record dates for a compilation of treaties by giving the date or inclusive dates (e.g., 1713-1715).</p>
	Participant in a Treaty
6.22	<p>Deleted element “signatory to a treaty, etc.” and substituted new instruction (Cf. 19.3.2.13).</p>
	Variant Access Point Representing a Work or Expression
6.27.4.1-6.27.4.5	<p>Reworded for consistency; examples changed and updated.</p>
	Additions to Access Points Representing Musical Works with Titles That Are Not Distinctive

RDA Instruction Number	Summary of Change
6.28.1.9	<p>Reorganized instructions substantially. Note in particular:</p> <ol style="list-style-type: none"> 1) Exceptions about adding medium of performance moved to 6.29.1.9.1 which is a new instruction, Medium of Performance, with instructions lettered a)-h) 2) Instructions about recording order of medium of performance moved from 6.15.1.3 to 6.29.1.9.1. 3) Accompaniment for songs, lieder, etc. instruction from former 6.15.1.12 moved to 6.19.1.9.1, Exceptions, h). 4) New sub-instructions for adding numeric designation and key at 6.28.1.9.2-6.28.1.9.3 5) Former 6.28.1.9.1 Additions ... when Medium of Performance, Etc., Insufficient or Not Available moved to 6.28.1.9.4
	Two or More Parts (Musical Work)
6.28.2.3	Added an exception for <i>Suite</i> .
	Treaties
6.29.1.15	<p>The instructions for authorized access points for individual treaties have changed significantly. Note in particular:</p> <ol style="list-style-type: none"> 1) Signatory to a treaty is no longer used as part of the authorized access point for a treaty. 2) The authorized access point is constructed using the preferred title plus additions. 3) Instructions for authorized access points for individual treaties have been collapsed into one instruction. There are no longer separate instructions for different types of treaties (e.g. <i>Agreements Contracted by the Holy See</i>), but there are still examples showing different types of individual treaties.
	Protocols, Amendments, Etc.
6.29.1.16	Former 6.29.1.19 is now 6.29.1.16. Reworded to clarify that an authorized access point for a protocol is formed by adding elements from 6.29.1.30.3 to the authorized access point for the treaty.
	Compilations of Treaties

RDA Instruction Number	Summary of Change
6.29.1.17	<p>Former 6.29.1.20 is now 6.29.1.17. The instructions for authorized access points for compilations of treaties have changed significantly. Note in particular:</p> <ol style="list-style-type: none"> 1) Signatory to a treaty is no longer used as part of the authorized access point for any compilation of treaties. 2) The authorized access point is constructed using the preferred title plus additions. 3) Instructions for authorized access points for compilations of treaties have been collapsed into one instruction. There are no longer separate instructions for different types of compilations (e.g., Treaties, Etc., Contracted between One Party and Two or More Other Parties) 4) Compilations of treaties that have a collective name (e.g. Treaty of Utrecht) use that collective name plus additions for the authorized access point. 5) Compilations of treaties without a collective name follow instructions at 6.27.1.4. <p>Instructions 6.29.1.18-6.29.1.29 are renumbered but unchanged from former 6.29.1.21-6.29.1.32.</p>
	Additions to Access Points Representing Treaties
6.29.1.30	<p>Revised former 6.29.1.33 as new 6.29.1.30. Contains these new sub-instructions for additions to access points:</p> <p>6.29.1.30.1 Treaties 6.29.1.30.2 Compilations of Treaties 6.29.1.30.3. Protocols, Etc.</p>
	Variant Access Point Representing a Legal Work or Expression
6.29.3.1-6.29.3.4	<p>Reworded for consistency; examples changed and updated. 6.29.3.3 Variant Access Points Representing Treaties contains instructions on constructing variant access points using the authorized access points of a participant plus the title of the treaty.</p>
	General Instructions on Liturgical Works
6.30.1.5.1-6.30.1.5.3	<p>Reorganized and reworded for clarity. 6.30.1.5.4 and 6.20.1.5.5 were deleted with content moved to earlier instructions.</p>
Chapter 9: Identifying Persons	
	Purpose and Scope
9.0	<p>Reworded for consistency.</p>
Other Designation Associated with the Person	
9.6	<p>Revised core statement to indicate more instances where the element is core. In addition to Christian saint, spirit, and to break conflict, other designation is now core for these categories: a person named in a sacred scripture or an apocryphal book, a fictitious or legendary person, and a real non-human entity. To satisfy the core element requirement, the designation should be recorded in MARC field 368. See 9.19.1.2 for related changes about when the other designation is added in an authorized access point.</p>

RDA Instruction Number	Summary of Change
	General Guidelines on Constructing Authorized Access Points to Represent Persons
9.19.1.1	Revised instruction to provide guidance for adding an appropriate designation for persons whose name consists of a phrase or appellation not conveying the idea of a person for the following categories: humans, fictitious or legendary characters, and real non-human entities. Several examples with explanations have been added.
	Title or Other Designation Associated with the Person
9.19.1.2	<p>Revised instruction and added sub-instructions to provide clarification on additions to names of persons by category:</p> <p>9.19.1.2.1 Title of Royalty</p> <p>9.19.1.2.2 Title of Nobility</p> <p>9.19.1.2.3 Title of Religious Rank</p> <p>9.19.1.2.4 Saints</p> <p>9.19.1.2.5 Spirits</p> <p>9.19.1.2.6 Other Designation Associated with the Person</p> <p>The revised instructions also indicate the order of additions, whether the addition is always made or only when needed to distinguish, and include many new and revised examples</p>
Chapter 10: Identifying Families	
Language of the Family	
10.8-10.11	<p>Added a new element for Language of the family (similar to language of the person and language of the corporate body). Incorporation of this new element at 10.8 caused a renumbering for the following instructions that are otherwise unrevised:</p> <p>10.9 Family History</p> <p>10.10 Identifier for the Family</p> <p>10.11 Constructing Access Points to Represent Families</p>
Chapter 11: Identifying Corporate Bodies	
General Guidelines (Date Associated with the Corporate Body)	
11.4.1.3	Revised instruction to provide techniques for expressing dates that are approximated or represent a range of years or centuries (wording similar to dates for persons).
Period of Activity of the Corporate Body	
11.4.5	Added new element sub-type for the period of activity of a corporate body for use when a date of establishment or termination is unknown. Core element when to needed to distinguish a corporate body from another corporate body with the same name. See 11.13.1.5 for instructions on using in an authorized access point.
Type of Corporate Body	

RDA Instruction Number	Summary of Change
11.7.1.4	The instruction formerly captioned “Names not Conveying the Idea of a Corporate Body” have been revised and re-captioned as “Type of Corporate Body” to more clearly delineate the three types of “other designations”: type of corporate body, type of jurisdiction, and other designation. Type of corporate body is core when the corporate body name does not convey the idea of a corporate body, or when the designation is needed to distinguish one corporate body from another with the same name.
	Other Designation
11.7.1.6	Examples appropriate to 11.7.1.4 moved and 11.7.1.4 added to list of “if none of the following attributes are sufficient.”
	General Guidelines on Constructing Authorized Access Points to Represent Corporate Bodies
11.13.1.1	Examples of additions added to conference names to break conflict added.
	Type of Corporate Body
11.13.1.2	Renamed from “Addition to a Name not Conveying the Idea of a Corporate Body” and scope expanded to include breaking conflict between bodies of the same name in addition to names not conveying the idea of a corporate body.
	Date Associated with the Body
11.13.1.5	Revised to include adding period of activity of the corporate body to the authorized access point.
	Access Point for a Series of Conferences, Etc.
11.13.1.8.2	Revised instruction to exclude the location of a conference as an addition to an access point for a series of conferences. Under the revised instruction, an access point for a series of conference would not get additions for number, date, or location of a conference (those additions would still be made for access points for a single instance of a conference, etc., in 11.12.1.8.1). Be careful not to confuse a “Place associated with a corporate body” added to distinguish different conferences with the same name with a location of a conference.
Chapter 19: P-F-CB Associated With a Work	
Corporate Bodies Considered to be Creators	
19.2.1.1.1	Revised to removed treaties and other international agreements from the list of types of legal works in paragraph g) where a corporate body could be considered the creator of a work. See 19.3.2.13 below for the treatment of “Participants in a treaty”.
Participants in a Treaty	
19.3.2.13	“Participants in a treaty” (formerly known as signatories to a treaty) should now be considered as a type of “Other Person, Family, or Corporate Body Associated with a Work” at 19.3.2.13 instead of the former practice that treated them as creators. A new section with examples was added.
Chapter 20: : P-F-CB Associated With an Expression	
Scope (Contributor)	

RDA Instruction Number	Summary of Change
20.2.1.1	Reworded to clarify distinction between contributors and compilers, who are creators, covered in 19.2.1.
Appendix D	
	Publication, Distribution, Etc., Area (ISBD punctuation)
D.1.2.5	Added new paragraphs to show ISBD punctuation used when a date appearing on the resource in more than one calendar is recorded (an equals sign is used to separate the date in different calendars).
Appendix E	
	Access Points Representing Works and Expressions (Punctuation of Access Points)
E.1.2.5	Added information about the punctuation used for enclosing the number of parts or players and the number of hands in a medium of performance.
Appendix I	
	Relationship Designators for Other P-F-CB Associated with a Work
I.2.2	Added relationship designator "participant in a treaty." This can be used for a signatory, ratifier, etc.
	Relationship Designators for Contributors
I.3.1	The relationship designator for "editor of compilation" has been deleted, and the concept incorporated into a revised relationship designator for "editor."