

Library of Congress Training for
RDA: Resource Description & Access

Using the RDA Toolkit



Revised for Toolkit releases through April 2014

For use by catalogers external to the 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 developed for the Library of Congress preparation for the implementation of “RDA: Resource Description & Access” as a new set of cataloging instructions. It is intended for any person who needs to utilize the RDA Toolkit to access and apply the new rules. *It is intended for staff external to LC.*

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.

This material has been revised to reflect the Toolkit releases through April 2014.

Learning Objectives

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

- log into the RDA Toolkit using the ‘institutional account’ means of Toolkit access
- create and log into a User Profile
- 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 LC-PCC 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 set of cataloging instructions that replaces AACR2. In addition to RDA, the other resources available through the Toolkit are:

- AACR2, to help you know where to begin
- *Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS)*
- 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 various schemas, including MARC 21

Ways of Accessing the Toolkit

RDA Toolkit offers three options for authenticating an institutional account: IP authentication, referring URL authentication, or account ID authentication. During registration, each institution chooses one of these methods. Toolkit “Help” provides more information on each option. The user login experience varies depending on the authentication method chosen. Once you are logged in, the interface experience is uniform regardless of your authentication process.

- The Library of Congress utilizes an institutional account, which is described generically on the next page. But this may not be the situation at your institution. Login procedures will need to be provided by each institution to their own staff.

Accessing the RDA Toolkit

- Although the RDA Toolkit can be accessed through Cataloger’s Desktop (assuming you already subscribe to Cataloger’s Desktop), we will concentrate in this class on accessing the Toolkit *directly* so we learn how to utilize the ‘pure’ Toolkit.

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



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
 - To bypass the home page and go directly to the RDA Toolkit itself, bookmark the Toolkit URL (<http://access.rdatoolkit.org/>). From there, you can always open the home page 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. If using the Toolkit through IE, some features may look and function differently than presented in this material.

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. You should use at least the second status, “Authenticated”, and have the option of proceeding to the third status, “Full Access,” by logging into your 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:

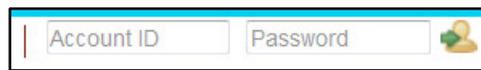
- browse the Table of Contents (on the **RDA** tab)
- navigate the RDA Mappings (on the **Tools** Tab)
- view the LC-PCC Policy Statements (on the **Resources** tab)
- view the Other Resources (on the **Resources** tab)

Authenticated

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

- The following steps describe the account ID method of authentication. This may not be how your institution accesses the Toolkit.

1. In the first field, type your **account ID**
2. In the second field, type your account **Password**
3. Click on the **Login** icon to the right



A legend in the blue banner indicates that you are authenticated to your institutional account

In this status, you can view the RDA instructions, Shared Workflows, and the RDA Element Set View. But you do not have full use of the site until you login to your User Profile; you can then:

- manage preferences
- create and manage bookmarks
- save searches

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 the name of the institution appears in the blue bar (as shown above).

Creating a User Profile

In order to utilize some of the more useful Toolkit features -- User Preferences, Bookmarks, and Saving Searches -- you must login to your User Profile. This means going one step beyond the institutional login. In order to login to your User Profile, you first need to *create* a User Profile.

1. Click on the **Create Profile** icon (just to the right of the **Login** icon)
2. Complete the lower portion of the **dialog box** (see the example on the next page).

Full Name:

Enter the name that you want to display in the banner when you have full access.

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.



3. Check the “**I agree to the RDA Toolkit terms and conditions**” box.
4. Click on **Create**

Rules for User Names, Profile Names, and 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

User Profile Password Email Reminder

If you forget your password, you can click on the “Email Password” link (just below the institution name in the banner) once you are authenticated. After you type your email address and click on “Send,” an email with your password will be sent shortly.

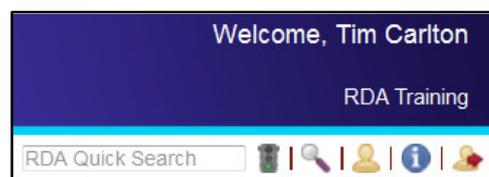
Logging in for Full Access

*Note: We won’t need to do this step this time, because when you first create the Profile, you are then automatically logged into that profile.
But for future logins, if you want to login to your User Profile ...*

1. In the first field, type your **Profile Name**
2. In the second field, type your **Password**
3. Click on the **Login** icon



Now, you will have full access and see your Name above the Institution Name ⇒ ⇒ ⇒



(these images illustrate a user logged into a User Profile within a special temporary training account)

Access to AACR2 via Cataloger's Desktop

In January 2012 the Library of Congress announced that it would transition from AACR2 (Anglo-American Cataloguing Rules, second edition) to RDA (Resource Description and Access) on March 31, 2013.

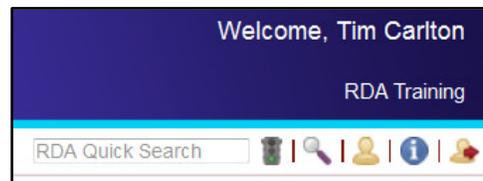
AACR2 has been available via LC's web-based cataloging documentation subscription service, Cataloger's Desktop, as well as through RDA Toolkit. In keeping with LC's decision to switch from AACR2 to RDA, Cataloger's Desktop will simultaneously change how access to AACR2 is provided.

As of April 1, 2013, if you subscribe to both Cataloger's Desktop and RDA Toolkit (which includes an online version of AACR2), you will continue to have access to AACR2. If you subscribe to Cataloger's Desktop but not to RDA Toolkit and want online access to AACR2, you will need to establish an RDA Toolkit subscription at <http://www.rdatoolkit.org/>.

Unit 2: Interface and Navigation

User Menu

The User Menu is located at the top-right of the Toolkit interface, just below the indication that you are authenticated into the institutional account. We will briefly look at each of the functions on the User Menu.



RDA Quick Search

(To be covered in hands-on detail in Unit 3)

You can search for a specific RDA Instruction number or a phrase in RDA Chapters, Appendices, Glossary, and Index. The RDA Quick Search will search *only* RDA itself.



Go

This icon is used to execute a Quick Search. Alternatively, you can simply press <Enter>.



Advanced Search

(To be covered in hands-on detail in Unit 3)

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.



My Profile

✓ Click on the **My Profile** icon

“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

✓ Click on the **Support** icon

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



Logout

(In class, do **NOT** click on Logout)

Logging out takes you out of “authentication” status, and entirely closes the Toolkit.

Browse Tree -- Tools Tab

- ✓ Click on the **Tools** tab

RDA Mappings

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

1. Click on the **plus sign (+)** before **RDA Mappings**
2. Click on **MARC Bibliographic to RDA Mapping**
3. Scroll down to the **first entry for the 245 c** subfield
4. Click on the **grey link in the first column**
This link opens the MARC 21 Bibliographic Format, to the 245 data, in its own window.
5. **Close** the new browser tab
6. Click on the **blue link to instruction 2.4.2**
This takes you to that instruction *and* changes your tab in the Browse Tree.
7. Click on the **Tools** tab
Similarly, you can follow the links from **MARC Authority to RDA Mapping**

RDA Mappings will be helpful as a ‘bridge’ to RDA, but should not be used as a ‘crutch’; you need to be able to confidently navigate the RDA structure.

- You are encouraged to look at the other sections of the Tools Tab on your own.

Browse Tree -- Resources Tab

The Resources tab provides the full text of AACR2, the LC-PCC and National Library of Australia Policy Statements, and Other Resources. At first, you may find it helpful to navigate from a known AACR2 rule to the related RDA instruction, or to go directly to an LC-PCC PS.

- ✓ Click on the **Resources** tab

AACR2

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



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.

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

Library of Congress-Program for Cooperative Cataloging Policy Statements

Let's see if there is an LC-PCC PS for the alternative to the RDA instruction we just viewed. (Note: It is more efficient to access the LC-PCC PS by following the green **LC-PCC PS** link within RDA -- but the purpose of this exercise is to practice navigating the hierarchy)

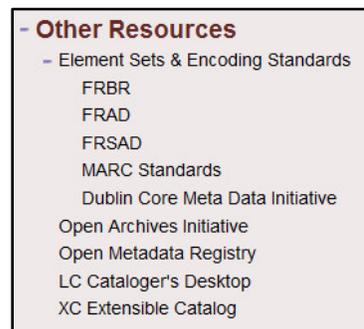
1. Click on the **plus sign (+)** in front of the **LC-PCC PS**
2. **Expand the RDA 7 hierarchy** and click on the LC-PCC PS for **7.15.1.3 Alternative**
3. Scroll up and click on the **minus sign (-)** to collapse the LC-PCC PS hierarchy

Other Resources

4. Click on the **plus sign (+)** to expand **Other Resources**
5. Click on the **plus sign (+)** to expand **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
- **MARC Standards** takes you to LC's MARC home page
- **LC Cataloger's Desktop** takes you to the login page for Cataloger's Desktop



Tips on Using 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 separating 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; collapse it by clicking on “-” signs.

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

- ✓ Click on the **RDA** tab
- ✓ Click on the **plus sign (+)** in front of **RDA**
- ✓ **Expand** the hierarchy of **Section 1: Recording Attributes of Manifestation & Item**
- ✓ **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.

- ✓ Click on the reddish-brown text **title proper** in **2.3.2.1**
- ✓ Click on the browser “**Back**” arrow to return to the previous location

References to other instructions are active links to those instructions

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

Examples are labeled and presented on a dull yellow background.

- ✓ 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.

- ✓ 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.

- ✓ Scroll down to the **optional addition within 2.3.2.6**

“*Page Number*” icons



The larger chapters of RDA load in sections, allowing for quicker loading. For navigation, a row of ‘page numbers’ appears at the top left of the document pane. Click on the red **Previous Page** icon (at the left) or the green **Next Page** icon (at the right) to navigate among these ‘pages’ (you probably won’t know exactly which numbered page to click on to find what you need).

- ✓ Click on a few of these page numbers to quickly navigate to other parts of Chapter 2

Browse Tree -- RDA Tab

The RDA tab contains the RDA instructions. The instructions are organized according to FRBR entity-relationship principles:

- Sections **1-4** concern **Entity Attributes**
 - *Group 1* entities (Sections 1 and 2)
 - *Group 2* entities (Section 3)
 - *Group 3* entities (Section 4; primarily a placeholder)
- Sections **5-10** concern **Relationships**
 - (ignore the problematic Section 5)
 - *from Group 1 entities to Group 2/3 entities* (Sections 6 and 7)
 - *between Group 1* entities (Section 8)
 - *between Group 2* entities (Section 9)
 - *between Group 3* entities (Section 10; a placeholder)

+ Section 1: Recording Attributes of Manifestation & Item
+ Section 2: Recording Attributes of Work & Expression
+ Section 3: Recording Attributes of Person, Family, & Corporate Body
+ Section 4: Recording Attributes of Concept, Object, Event & Place
+ Section 5: Recording Primary Relationships Between Work, Expression, Manifestation, & Item
+ Section 6: Recording Relationships to Persons, Families, & Corporate Bodies
+ Section 7: Recording Relationships to Concepts, Objects, Events, & Places
+ Section 8: Recording Relationships between Works, Expressions, Manifestations, & Items
+ Section 9: Recording Relationships between Persons, Families, & Corporate Bodies

➤ ***The Section numbers have nothing to do with the numbering of instructions. The first level of the instruction number refers to the Chapter. For example, RDA instruction 6.2.2.10 is in Chapter 6, not Section 6.***

Exercise 1. Examining the Structure of RDA***Exercise 1a. “Where are the instructions on the identifying attributes of a manifestation?”***

1. Expand **Section 1: Recording Attributes of Manifestation & Item**
2. Notice the breakdown of Section 1 into General Guidelines and then one chapter each on Identifying Manifestations and Items, Describing Carriers, and Providing Acquisition and Access Information
3. Expand **Chapter 2: Identifying Manifestations and Items**
4. Examine *briefly* the attributes that are covered in this chapter

Exercise 1b. “Where are the instructions on the identifying attributes of a person?”

5. Expand **Section 3: Recording Attributes of Person, Family, & Corporate Body**
6. Notice the breakdown of Section 3 into general guidelines and then one chapter on each Group 2 entity – Persons, Families, Corporate Bodies
7. Expand **Chapter 9: Identifying Persons**
8. Examine *briefly* the attributes that are covered in this chapter

Exercise 1c. “Where are the instructions on the relationship of a creator to a work?”

9. Expand **Section 6: Recording Relationships to Persons, Families, & Corporate Bodies**
10. Notice the breakdown of Section 6 into General Guidelines and then one chapter each on the associations of these entities with Works, with Expressions, with Manifestations, and with Items
11. Expand **Chapter 19: Persons, Families, and Corporate Bodies Associated with a Work**
12. Expand **19.2 Creator** and *briefly* review the numerous examples of creators

Exercise 1d. “Where are the instructions on ‘related works’?”

13. Expand **Section 8: Recording Relationships between Works, Expressions, Manifestations, & Items**
14. Notice the breakdown of Section 8 into General Guidelines and then one chapter each on Related Works, Related Expressions, Related Manifestations, and Related Items
15. Expand **Chapter 25: Related Works**
16. Expand the hierarchy down to **25.1.1.3 Referencing Related Works** and *briefly* review the numerous examples of related works

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

We will not explore Chapter 0 in detail, but you are encouraged to review it on your own.

Exercise 2. Following links to LC-PCC PS

“Where are the instructions on recording the complicated or irregular paging of a single-volume book?”

1. Expand (i.e., click on the **plus sign (+)** in front of) **Section 1**
2. Expand **3: Describing Carriers**
3. Expand **3.4: Extent**
4. Expand **3.4.5: Extent of Text**
5. Click on **3.4.5.8 Complicated or Irregular Paging**
6. Scroll down to the examples and determine what is different from AACR2

What are the options permitted by RDA?

“Is there an LC-PCC PS on this instruction?”

7. Click on the green **LC-PCC PS** link

What is the LC-PCC Policy?

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

Exercise 3. Following links to related RDA instructions**“Where are the instructions on recording the ‘creator’ of a work?”**

Sometimes, you need to consult instructions in several sections of RDA. For example, under AACR2, in order to provide an access point for a person as ‘main entry,’ you would consider:

- Which person deserves the main entry?
- How do I construct the heading for that person?

You would answer these questions by consulting Chapter 21 (for “choice” of access point) 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?

Let’s see how Toolkit links help you navigate chapters 19, 18, and 9 to answer these questions...

1. Expand **Section 6: Persons, Families & Corporate Bodies**
2. Expand **Chapter 19: Persons, Families and Corporate Bodies Associated with a Work**
3. Click on **19.2 Creator**
4. Click on the green **LC-PCC PS** link and read the policy statement
5. Click on the blue **RDA** link to return to the RDA instruction
6. Scroll down to **19.2.1.3** and read the instruction on recording creators
7. Click on the link to **18.4** for the general guidelines
8. Follow the link to **18.4.1.2** for instruction on *providing* the authorized access point
9. Click on the link to **9.19.1** for instruction on *constructing* the access point for a person
10. Click on the link to **9.2.2** for instruction on choosing the preferred name of the person

Exercise 4. Using the RDA Table of Contents**“Where are the instructions on recording the title in a compilation of two or more works?”**

1. Click on the **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 and click on the link to **6.2 Title of the Work**
3. **Expand** the Browse Tree hierarchy for **6.2.2 Preferred Title for the Work**
4. **Expand** the hierarchy for **6.2.2.10**
5. Click on **6.2.2.10.3**
6. Click on the link to view the **LC-PCC PS** on the alternative

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

7. Click on the **RDA** tab

Exercise 5. Using the RDA Glossary and Index

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

1. Expand the **Glossary** to the “C” portion
2. Click on **Carrier Type**
3. Expand the **Index** to the “C” portion
4. Click on the “C” portion of the Index
5. Scroll down to **Carrier Type** in the document pane and click on the link to **3.3**

Browsing AACR2 and LC-PCC PS Directly

You may find it helpful to start with a known AACR2 rule, and then link to the RDA instruction.

Exercise 6. 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 to 21: Choice of Access Points**, expand, and click on **21.1B2**
3. Click on the blue **RDA** link, which takes you to RDA **19.2.1.1.1**
4. Scroll down to **19.2.1.3** and look at the examples that start with “**Works of an Administrative Nature**”
Does this rule look pretty familiar?

Exercise 7. Going directly to an LC-PCC PS

“I know that LC-PCC PS 1.7.5 addresses Symbols, but I can’t remember what it says.”

1. Click on the **Resources** tab
2. Display LC-PCC PS to the **chapter** level.
3. Expand **RDA 1: General Guidelines on Recording Attributes of Manifestations and Items** and click on the **LC-PCC PS for 1.7.5 Symbols**
4. Click on the blue **RDA** link to view examples

Update History

In accordance with agreements among national cataloging organizations, instructions and Policy Statements will change on occasion. There are 2 ways you can stay up-to-date on the changes.

- At the bottom of the RDA tab is a link to **RDA Update History**, arranged by date of update. The link to “Update Summary” is a brief explanation of changes. Alternatively, you can expand the hierarchy down to an instruction, and jump to the *former* instruction. The instructions in the Instruction Archive appear on a blue-tinted background.
- Within the RDA instructions, click on the blue icon to view the *former* instruction. The number in the icon refers to the year/month of the update. 
➤ To see this ‘in action’, go to **6.2.1.7**.

Unit 3: Searching

Document Menu



Let's briefly point at the icons on the Document Menu at the top right of the document pane...



Find URL

This icon allows you to quickly get a URL in order to create a link to any location in the Toolkit, which you can then copy (e.g., for pasting into an email or other document).



Language Select

This icon allows you to temporarily switch the language display to French or German, without logging into a profile and changing your preference settings.



Dual View

This icon allows you to change the single display pane to a display with two, stacked panes. With this view users can simultaneously view different language versions of RDA content.



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

The Browse Tree automatically 'synchs' as you follow links. But you can **Synch TOC** after *scrolling*. This is useful because the Toolkit has no 'breadcrumbs' to tell you where you are. You can turn off this 'automatic synching' in "My Profile" (*but why would you want to?*).



Return to 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.



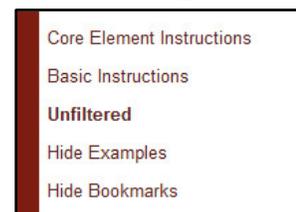
View Text

The View Text menu allows you to limit the document display in several ways.

1. Navigate to **RDA Instruction 2.11.1.3** (*note the presence of yellow-boxed examples*)
2. Click on **View Text**

The current selection appears in *slightly bolder* text.

- **Core** displays only Core instructions
- **Basic** displays those instructions identified by the JSC as basic to cataloging in RDA
- **Unfiltered** is the default, and displays the entire document.



If you select "Core" or "Basic", 'filtering' labels display at the top of the Document Pane.

3. Click on **Core Element Instructions**

The document jumps to the beginning of the 'page' and now displays only 'core' instructions.

4. Click on **View Text > Unfiltered**

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

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

Notice that the yellow boxes include only a mention of examples – not the examples themselves.

This can be useful for reading just the instructions, uninterrupted by examples.

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

The **Hide Bookmarks** option hides the visual indicator that a bookmark is present. The menu toggles between “Hide Bookmarks” and “Show Bookmarks.”

- You can ‘turn on’ a setting in “My Profile” to **Hide Examples** by default (*but be sure to turn it off as necessary!*). See “**Unit 4: Personalizing the Toolkit.**”



Bookmark

We will work with Bookmarks later.



Print Text

Clicking on this button provides only a very limited printing capability. The *entire chapter* opens as a “PDF” document, and you then use the PDF “Print” functions to print what you need (you will probably want to explicitly specify that you want to print only *selected* pages).

- Consider this alternative 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

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, based on the number of occurrences within a document and the relative position of each hit within the document (i.e., *is it in a heading or paragraph?*).

After any search which yields more than one result, you can re-sort the results by instruction number. Simply choose “Document Order” from the menu at the top-right of the results (this setting does *not* carry forward to your next search).



RDA Quick Search



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

Exercise 8. 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. View the RDA Browse Tree 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 -- and 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 enclose an instruction number in quotation marks (e.g., “6.2.2.10”), you will retrieve a results list which includes a) that instruction and all of its sub-instructions (e.g., 6.2.2.10.1, etc.) and b) any instructions which include a link-reference to that instruction.

Exercise 9. 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** result
 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’.
 8. View the RDA Browse Tree to see the context for the current instruction

- **‘Hits’ and ‘results’ are not the same thing.**

Exercise 10. 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. How many results do you get? _____

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

*You now retrieve fewer results, and they are more on target. How many do you get? _____
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 allows you to refine your search in several ways. You can:

- use the AACR2 rule number as your search strategy in searching RDA
- specify which documents are to be searched -- or which *sections* of those documents
- broaden a search by choosing additional documents to be searched, beyond RDA itself
- exclude examples from the scope of a search
- narrow a search by choosing from among the different “instruction types”
- save a search
- take advantage of the Toolkit’s ability to ‘remember’ your previous search

Exercise 11. Searching by AACR2 rule number

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

For example, to find the RDA instruction on **changes in title proper for a serial** :

1. Click on the **Advanced Search** icon
2. Click on the **Clear Previous Search** icon 
3. Type **12.1b8** in the “AACR2 Rule Number” box
4. Press the **<Enter>** key

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

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

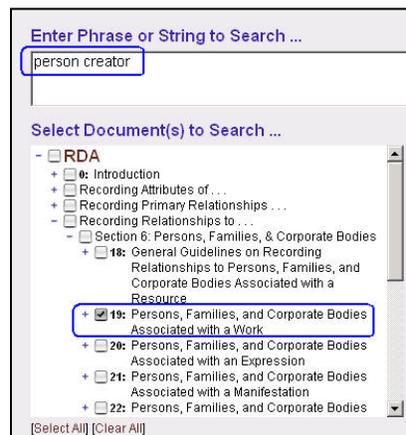
Note: Because the mapping of AACR2 rules to RDA instructions works ‘behind the scenes’, you can be more likely to retrieve all relevant mappings if you truncate your search string and add the wildcard symbol (i.e., search for “21.1b*” rather than “21.1b2”).

Exercise 12. 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** icon (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 (attributes), the Appendices (relationship designators), and 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** icon
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**

**“How can I find guidance on when to provide a formal contents note for a compilation?”**

1. Click on the **Advanced Search** icon
2. Click on **Clear Previous Search**
3. Type **contents notes** in the search box
4. Check the boxes to search in **RDA** and **LC-PCC PS**
5. Click on **Search**

The first hit is probably the most useful hit; if you had searched this only in RDA, this hit would not be retrieved, nor would any hit that link you to this hit.

Exercise 13. Excluding examples from the scope of a search**“How can I find a term only in an instruction? I don’t want to see dozens of examples.”**

1. Click on the **Advanced Search** icon
2. Click on **Clear Previous Search**
3. Type **creator** in the search box
4. Check the boxes to search in **RDA** and **LC-PCC PS**
5. Click on **Search**
6. Click on the **first result** and then advance using **“Next Hit”**

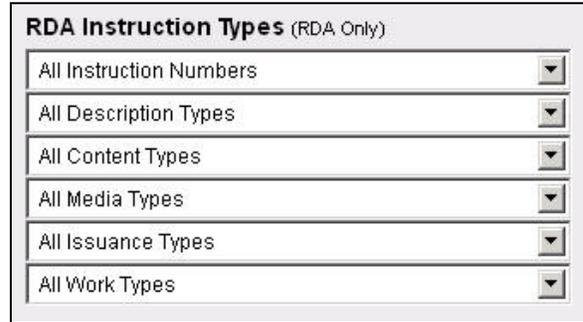
There are many more “Hits” than “Results,” because every example in 19.2 includes the phrase “Authorized access point representing the creator.” Let’s make this a more manageable search:

7. Click on the **Advanced Search** icon
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.

Instruction Types

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.

- *We will not explore this function in detail; at the end of this Unit are two suggested exercises for you to try on your own.*

All Instruction Numbers

Accept this default, or limit the search to:

- **Core**



All Description Types

Accept this default, or limit the search to:

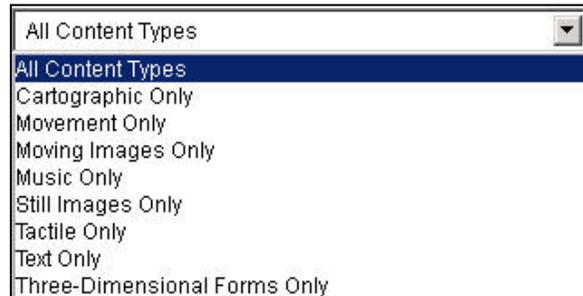
- Analytical
- Comprehensive
- Hierarchical



All Content Types

Accept this default, or limit the search to:

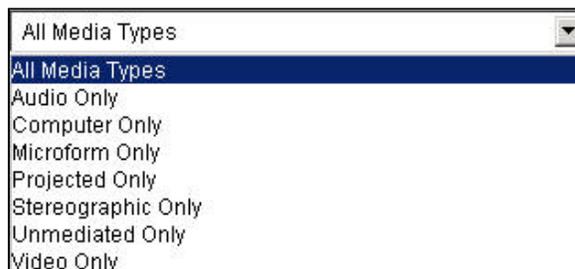
- Cartographic
- Movement
- Moving image
- Music
- Still images (visual or tactile)
- Tactile (movement, music, still image, text, or three-dimensional form)
- Text (notated, spoken, or tactile)
- Three-dimensional forms (visual or tactile)



All Media Types

Accept this default, or limit the search to:

- Audio
- Computer
- Microform
- Projected
- Stereographic
- Unmediated (content designed to be perceived directly through the human senses without 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

***Suggested exercises to do on your own***

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

There are too many results, and I only want those related to videorecordings. I could do this...

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

There are many fewer results -- and not really what I want to consult.

8. Click on the **Advanced Search** icon
9. Remove **videorecordings** 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 can quickly see the relevant result -- a chapter 6 instruction on constructing the authorized access point for a collaborative work (a motion picture is considered 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 “moving image works.”

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

A. The term “videorecording” 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 “videorecording” does not appear with the term “preferred title” in 6.27.1.3, why was this instruction retrieved by the second search?

A. We did not include the term “videorecording” in our search syntax. By specifying the Content Type, we specified only 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 (there is a paragraph captioned “Moving image works” that uses the term “videos,” but that is not an exact match for the search term); the programmers used their human intelligence to code this instruction as relating to “Moving Images”.

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

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

Let’s try another one ...

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

Yikes! Way too many 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 a few 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?

Unit 4: Personalizing the Toolkit

Manage Settings ...

- ✓ Click on the **My Profile** icon (in the User Menu)



- We will first look at the settings in the lower portion of this screen.

Remember:
you only see these preferences if you are logged into your user profile.

Toolkit Settings

These settings customize the behavior of the RDA Toolkit when you login with your profile.

Language: Update

Split Documents By Page:

Automatically Synchronize TOC:

Hide Examples:

Display the selected link sets in...

RDA: LC-PCC PS NLA PS

AACR2: CM DCRMB LCRI MARC LAC RI

Language

LC staff should continue to use “Browser Default.” The French and German translations are not in ‘synch’ with the current English version of RDA.

Split Documents By Page

This setting allows the Toolkit to load large chapters in sections, which you navigate using the “Page Number Icons”. See the discussion of “Page Number Icons” on p. 8.

Automatically Synchronize TOC

This setting allows the Toolkit to automatically ‘synch’ the Browse Tree as you follow links. See the discussion of “Synch TOC” on p. 13.

Hide Examples

With this setting checked, the Toolkit automatically ‘hides’ the yellow-box examples in the Document Pane. See the discussion of the “View Text” menu on p. 13.

Display the selected link sets in ...

Subscribers to Cataloger’s Desktop are able to access AACR2 from Cataloger’s Desktop provided they have a current subscription to RDA Toolkit. Subscribers to both Toolkit and Desktop benefit from bidirectional links between Cataloger’s Desktop and the RDA Toolkit.

The Toolkit has enhanced the display with ‘turn-on-able’ links to the following resources:

- **Cartographic Materials**
- **Descriptive Cataloging of Rare Materials (Books)**
- **Library of Congress Rule Interpretations**
- **MARC 21**
- **Library and Archives Canada Rule Interpretations**

- *The upper portion of the “My Profile” dialog is used to “Manage Personalizations,” such as Bookmarks and Saved Searches. Since we have not yet created any of these, nothing appears here.*
- *We don’t need to do anything special to get out of this “My Profile” dialog; we just need to do something else – which we will do in our next step.*

Manage Personalizations ... 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 14. Creating bookmarks

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

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

Note that it doesn’t necessarily appear exactly where you clicked.

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

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

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

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

Exercise 15. Navigating to bookmarks

1. Click on **Bookmark**
2. Click on the **Go to Bookmark ...** drop-down menu
3. Select **Creator**
4. Click on **Go**

Let's do another ...

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

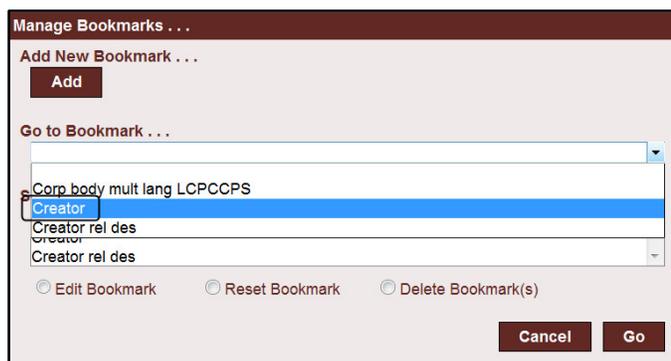
These steps take you directly to the Bookmark -- even if the bookmark is in the LC-PCC PS.

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 Edit, Reset, or Delete a bookmark

- 'Edit' allows you to rename a bookmark, add a link, add or edit an annotation, or change the sharing mode
- 'Reset' is supposed to allow you to move a bookmark; but this seems problematic

➤ You can also access your existing Bookmarks from the "My Profile" screen, either to go to them or to edit them.



Manage Personalizations ... Saved Searches

This feature can be useful in ways similar to ‘Bookmark’ situations -- you’ve searched your way to instructions you’ll need to consult again, and you don’t want to re-create the 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.

Consider this scenario:

Sometimes it is difficult to determine when an instruction concerns how to record an element and when it concerns how to construct an access point. A bookmark would always take you to the same instruction. But you could save a more broad search that yields a broader set of results.

Exercise 16. Saving a search

1. Click on the **Advanced Search** icon
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 results found in several parts of Chapter 9 -- general guidelines, specific instructions on constructing an access point, etc. -- and a few in other areas of the instructions, including the Appendices. Let’s try to narrow this down a bit.

6. Click on **Advanced Search**
7. Type “**period of activity**” “**access point**” in the search box (include both sets of “ ”)
8. Click on **Search**

The search yields fewer results.

*You don’t want to recreate this search every time, and you don’t want to create a bookmark for **9.19.1.5** because you may want to also see the related instructions. Instead, you can save the search, and then decide each time which result(s) to view.*

9. Click on **Advanced Search**
10. Do **NOT** **Clear Previous Search**
11. Type **period activity access point** in the “Save Search as ...” box
12. Click on **Search**

The screenshot shows the 'Advanced Search' interface. At the top, there's a search box with the text "period of activity" "access point". Below it, there are two columns of options. The left column, 'Select Document(s) to Search ...', has several items with checkboxes: RDA (checked), RDA: Element Set, RDA Mappings, Workflows, Maps, 2010 Entity Relationship Diagram (Archival), AACR2, Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS), and National Library of Australia Policy Statements (NLA PS). The right column, 'Select Metadata to Limit Search By ...', has 'Exclude Examples' unchecked and 'AACR2 Rule Number (RDA Only)' selected. Below these are several dropdown menus for 'RDA Instruction Types (RDA Only)', including All Instruction Numbers, All Description Types, All Content Types, All Media Types, All Issuance Types, and All Work Types. At the bottom, there's a 'Save Search as ...' box containing the text 'period activity access point' and a 'Search' button.

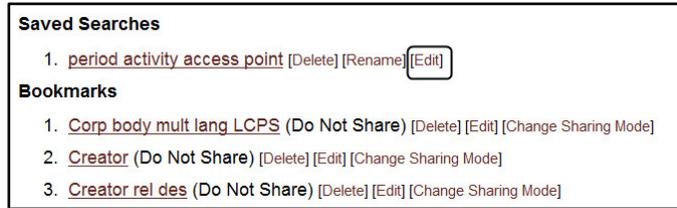
This saves the search and re-executes it.

Exercise 17. Making use of saved searches

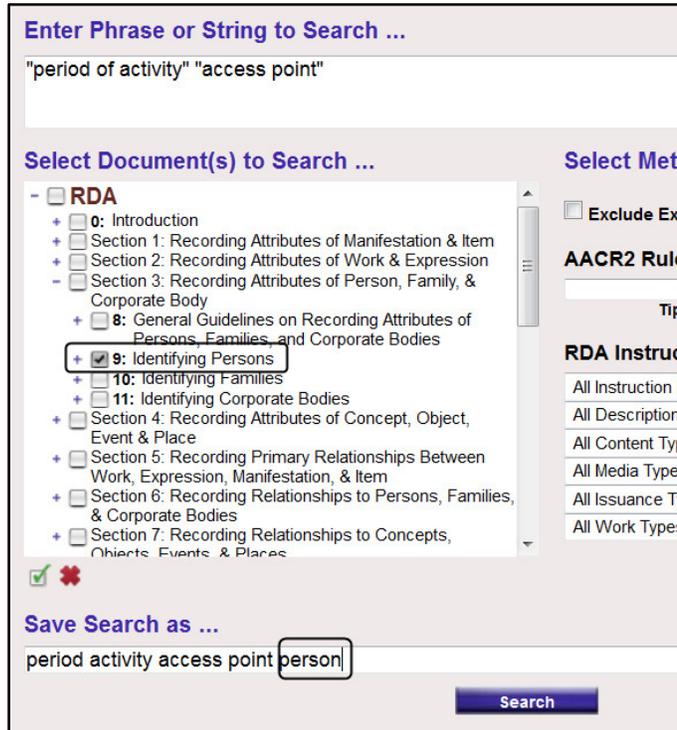
1. Click on **My Profile**
2. Click on the saved search **period activity access point**
You would then click on the desired instruction – which might not be the same each time

Let's say you also want to save an additional, slightly different search, limited to persons ...

3. Click on **My Profile**
4. Click on **Edit** after **period activity access point**



5. Expand the RDA hierarchy and limit the scope to **only Chapter 9** in section 3) of RDA
6. At the end of the “Save Search as ...” field, add **person**
7. Click on **Search**



8. Click on **My Profile**

Because we saved the search with a new name – just like saving a Word document with a new name – we now have 2 related saved searches.

- Note that we could simply *rename* a saved search, without changing the search strategy.

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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 maps, but will not create our own.

Workflows

Catalogers sometimes create workflows for cataloging different types of items. Workflows are step-by-step instructions for performing an aspect of cataloging, whether a specific part of a record or a complete record. The RDA Toolkit Workflows are an online repository of these workflows for personal, institutional, and global reference. This can eliminate the need to leave the RDA Toolkit to reference local documentation and provide the ability to link from local documentation directly to RDA instructions.

You can include active links to RDA instructions and to other resources. You also specify if you wish to share the workflow with anyone using the Toolkit (“Global”) or only with others at your institution (“Local”). Workflows may be helpful to catalogers making the transition from AACR2 to RDA, or who need to catalog a type of resource they’ve not cataloged before, and to persons who have not cataloged at all. If you want to put any personal reminders or ‘job aid’ in the Toolkit, please ensure that the document is in the “My Workflows” list.



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.

- LC catalogers are welcome to utilize any Workflows -- even those not created by LC -- that you find useful. If you have interest in creating a workflow that you and your colleagues would like to see in the Toolkit, please contact the Policy and Standards Division so you can determine how to develop the workflow.

Suggested exercise to do on your own

1. Click on the **Tools** Tab
2. **Expand** the “Workflows” hierarchy, and then expand the “Global 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 starts with a hyper-linked “table of contents”.
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 and then on the Workflow
7. Click on **Capitalization** and follow the link to **LCPS 1.7.1**
8. Click on the **Tools** Tab to return to the Workflow

To see a workflow that walks you through the process ...

9. In the Tools Browse Tree, click on the Global Workflow, **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. Click on the Global Workflow, **RDA 199: Relationship Designators Workflow**
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

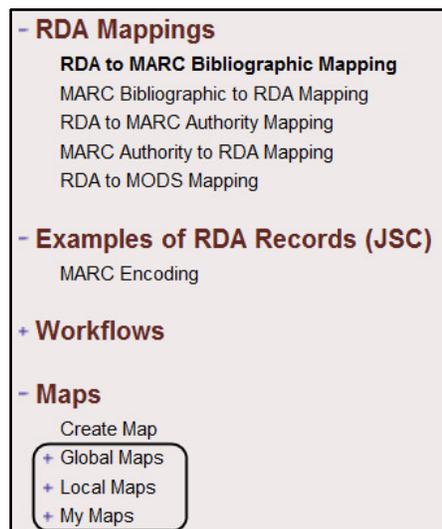
Maps

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

- As with Workflows, LC catalogers should not *create* Maps without first consulting PSD.

Suggested exercise to do on your own

1. **Collapse** the **Workflows** hierarchy
2. **Expand** the “Maps” hierarchy and then expand the “Global Maps”
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 MARC data likely to be encountered in records for music scores, mapped to corresponding RDA instructions, with examples and notes



Unit 6: Help, Support, and Other Resources

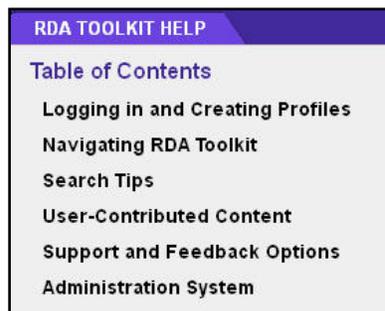
Help with Toolkit Functionality

RDA Toolkit Help

- ✓ Click on the **Help** link at the bottom of the Toolkit Browse Tree.

A separate window opens with a Table of Contents of several Help topics. Most of these topics are covered in greater detail elsewhere in this document.

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



- ✓ Close the “Help” window

Support

- ✓ Click on the **Feedback** link at the bottom of the Toolkit Browse Tree

The “Welcome to the Support Center” page opens. From this page, you can “Open A New Ticket” to send a free-form question to ALA., or you can check the status of existing ‘tickets.’

Toolkit Home Page

- ✓ Click on the **RDA Toolkit logo** above the Browse Tree.



The Toolkit Home page opens in a separate browser tab

- ✓ In the Navigation frame at the left, click on **Blog**
 - The Blog presents a variety of information, updated frequently, including the latest developments, interviews with Vendors, and ‘how-to’ advice. The Blog categories (at the right) group information on particular topics.
 - ✓ Briefly scroll down the Blog Categories to see what categories exist
 - You are encouraged to view the Blog regularly. If you wish to comment, you will need to create an account and login; this takes only a few minutes.

- ✓ In the Navigation frame at the left, click on **Development**

Here you can read about the status of recent Toolkit developments and revisions. Particularly helpful are the brief descriptions of the bi-monthly Toolkit “Releases.”

As with the Blog, Categories at the right help to group the many development items.

- ✓ In the Navigation frame at the left, click on **Teaching and Training**

Here you can access archived webinars and presentations on the Toolkit.

- ✓ Click on **Video Help**
ALA has an on-going effort of creating a variety of short video guides.
- ✓ Click on **RDA Toolkit Essentials**
These are webinars of live demonstrations of Toolkit features.

FAQ

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

Help Applying RDA Content

Examples

The Toolkit contains examples of RDA bibliographic and authority records.

- ✓ In the Navigation frame at the left, click on **RDA Examples**
- ✓ Click on **Examples of MARC RDA Record (JSC)**
- ✓ Click on **Examples of MARC RDA Record (JSC) - bibliographic records** to launch the examples in a new browser tab.

There are examples in a variety of formats (audio recording, book, serial, video recording, and web site). For each example, there is a table of RDA elements, ISBD punctuation and the RDA reference, and another table showing MARC coding. The bookmarks at the left help you navigate quickly through the examples.

- ✓ Click on the **Back** button in the browser

You could also click on the link for **authority records** to see examples for persons, families, corporate bodies, works, and expressions. As with the bibliographic examples, for each example, there is a table of RDA elements, ISBD punctuation and the RDA reference, and another table showing MARC coding.

- ✓ Close the “Help” browser tab
- ✓ Click on **Logout** to logout of both your Profile and the Toolkit in one step

Appendix: Quick Reminders about the RDA Toolkit

- ✓ Remember the two-stage authentication and login procedure. You must first be authenticated into a Toolkit account, using whichever authentication procedure is in use in your institution; you may then decide to go further and login to your personal profile.
- ✓ If you get timed-out, click on the large blue “Access RDA Toolkit” button; you will to again login.
- ✓ Generally, do not use the browser “Back” and “Forward” buttons for navigation within the Toolkit.
- ✓ Remember to clear your previous “Advanced” search.
- ✓ Always follow the directions of the LC-PCC PS, if that is appropriate for your institution.
- ✓ Do not ‘freeze’ yourself out of seeing important instructions by searching too narrowly or by using filters or instruction types injudiciously.
- ✓ On the other hand, with experience you can search more effectively by carefully selecting only portions of RDA or LC-PCC PS to be searched (e.g., a specific section or chapter)
- ✓ Be careful to know whether you are looking at RDA or LC-PCC PS.