Library of Congress Training for

RDA: Resource Description & Access

Using the RDA Toolkit

Revised for the Toolkit release of August 14, 2012

For use by catalogers external to the Library of Congress

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RDA: Resource Description & Access

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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 release of August 14, 2012.

Learning Objectives

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

- log into the RDA Toolkit with an institutional account and their 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 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 set of cataloging instructions 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)
- 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

The Institutional Subscription Account

An institution may wish to subscribe to the RDA Toolkit using an Institutional account, whereby one subscription is shared with an unlimited number of user profiles within the same institution.

Accessing the RDA Toolkit

1. Open Firefox[1] 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. 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. Staff in an institution will want to 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."

1. Type your **Account ID** where indicated
2. Type your **Password** where indicated
3. Click on the **Login** icon on the right

An institutional legend and "Create" icon (to the right of the Login icon) indicate that you are authenticated to the institutional account (the image shown here is for a user authenticated into the Joint Steering Committee 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. Until you do so, you cannot:

- manage preferences
- create and manage bookmarks
- save searches
- create, save, and share workflows and mappings

User Profiles

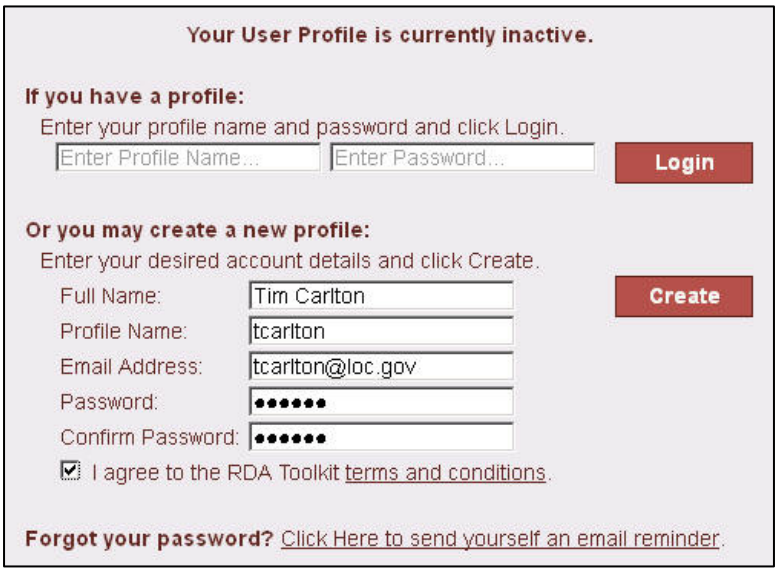
The User Profile login can be easily confused with the subscription account login. The Profile Name login boxes display only after the user has been authenticated to the institution-wide account and the name of the institution appears in the blue bar.

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** icon (just to the right of the Login icon)
2. Complete the **dialog box** (see the example shown on the next page).

Full Name:
Enter the name that you want to display in the blue banner (as shown on previous page).
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

Your name should now appear above the name of your institution in the blue banner at the top.

User Profile Password Email Reminder

If you have forgotten your password, you can click on the "Email Password" icon (on the far right of this row of icons) once you have been authenticated. You will be prompted to type your email address and click on "Send." An email with your password will be sent shortly.

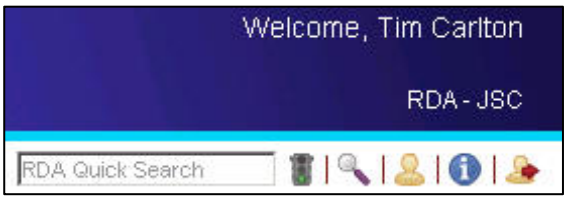
Full Access

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

4. Type your **Profile Name** where indicated
5. Type your **Password** where indicated
6. Click on the **Login** icon

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

The last icon to the right is the "Logout" icon. We will discuss the other icons a bit later.



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Unit 2: Interface and Navigation

For later RDA training courses, it will be assumed that you have developed competence in searching and navigating the Toolkit. NOW is the time to develop your expertise.

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.

RDA Quick Search

(To be covered in hands-on detail in Unit 3)
The RDA Quick Search will search only RDA itself. You can search for a specific RDA Instruction number or a phrase in RDA Chapters, Appendices, Glossary, and Index.

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

1. 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

2. 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

1. Click on the **Tools** tab

We will only look closely at the **RDA Mappings**. We will look briefly at the **Workflows** and **Maps** in later units. You are encouraged to look at the other sections of this tab on your own.

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.

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, in its own window, to the 245 data.
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
8. 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 be able to confidently navigate the RDA structure.

Browse Tree -- Resources Tab

The Resources tab provides the full text of AACR2, 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.

✓ 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
   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)
4. Click on the **Resources** tab
5. 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 the purpose of this exercise is to practice navigating the hierarchy)*

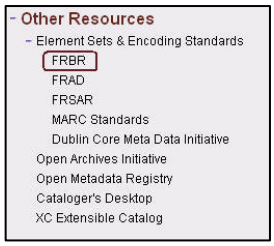
1. Click on the **plus sign (+)** in front of **Library of Congress Policy Statements (LCPS)**
2. **Expand the RDA 7 hierarchy** and click on the **LCPS for 7.15.1.3 Alternative**
3. Scroll up and click on the **minus sign (-)** to collapse the LCPS hierarchy

Other Resources

4. Click on the **plus sign (+)** in front of **Other Resources**
5. 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



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 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

✓ 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 instruction

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 in accordance with 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)
  - *Group 1 entities to Group 2 and 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)

➢ ***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 <u>Chapter</u> 6, not <u>Section</u> 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 for each Group 2 entity
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 categories of 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 examples of referencing 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 LCPS

"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 LCPS on this instruction?"

_____

7. Click on the green LCPS link

What is the LC Policy?

_____

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

Exercise 3. Following links to related RDA instructions

Sometimes, you need to consult instructions in several sections of RDA. For example, under AACR2, 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?

and 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?

Toolkit internal links help you move through chapters 19, 18, and 9 to answer these questions.

"Where are the instructions on recording the 'creator' of a work?"

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 LCPS 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 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 LCPS 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 t**he **"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 LCPS 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 **19.2.1.3**
4. 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?

Exercise 7. Going directly to an LCPS

"I know that LCPS 1.8.5 addresses Ordinal Numbers, but I can't remember what it says."

1. Click on the **Resources** tab
2. Display LCPS to the **chapter** level.
3. Expand **RDA 1: General Guidelines on Recording Attributes of Manifestations and Items** and click on **LCPS for 1.8.5 Ordinal Numbers**
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. 2012/04

➢ To see this 'in action', go to **6.2.1.7**.

Unit 3: Searching

Document Menu

The Document Menu is found on the right side of the document pane, just below the User Menu.

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

If you've lost track of where you are, the **Synch TOC** icon can help. **Synch TOC** is particularly useful because the Toolkit has no 'breadcrumb' feature.

- ***New with August 2012 release!*** The RDA Browse Tree automatically 'synchs' as you follow links in the document pane. You can turn off this 'automatic synching' in "My Profile" (*but why would you want to?).* But you may need to use the icon after you *scroll.*

Return to Results

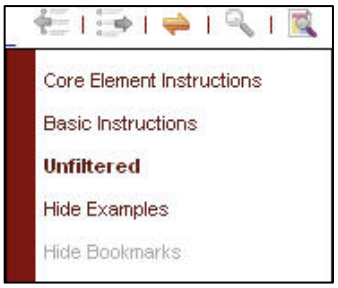
You can click on this to return to the most recent set of search results, after you have followed a hit to its location in the document. This button is only active once you have performed a search.

View Text

- ***Be cautious about filtering the view, so you do not miss instructions you need to access.***

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.

- ***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", the appropriate labels display at the top left 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 example boxes do not display. This can be useful when you want to read just the instructions, uninterrupted by examples.

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

Hide Bookmarks is grayed-out here because we are not on an instruction with a bookmark. Selecting this option hides the visual indicator that a bookmark is present. The menu toggles between "Hide Bookmarks" and "Show Bookmarks."

Bookmark

We will work with Bookmarks later.

Print Text

Clicking on this button provides only a very limited -- and sometimes slow -- printing capability. The *entire chapter* opens as a "PDF" document in a separate window, and you then use the PDF "Print" functions to print what you need.

Note: 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

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.

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 a 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 -- 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 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 (here, 6.2.2.10, 6.2.2.10.1, 6.2.2.10.2, and 6.2.2.10.3), 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 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.
   To express this another way: the first 'result' may not be the first 'hit.'
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. -- 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 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
- exclude examples from the scope of a search
- narrow a search by choosing from among the different "instruction types"
- broaden a search by choosing additional documents to be searched, beyond RDA itself
- save a search (we will cover this in the next unit)
- 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 RDA coding 'behind the scenes' lead you to the related instruction(s) in RDA.

For example, to find the RDA 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** icon

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

2. Click on the **Clear Previous Search** icon
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**

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**

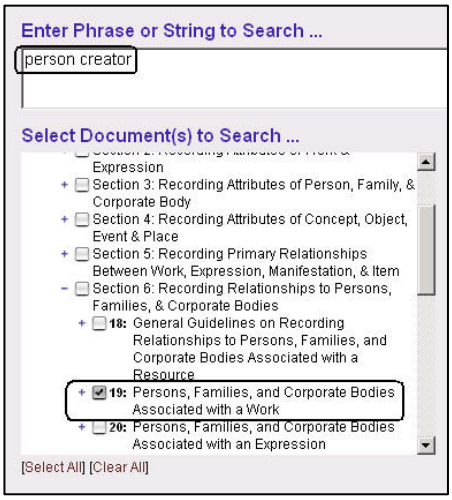
The Results are from various parts of RDA -- Chapter 19 (how to record), Chapter 18 (core elements), Chapter 6 (collaborative works), the Appendices (relationship designators) … and even a result in the Introduction. I just want to see the instructions on recording the relationship of a person to a work.

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

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** icon
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 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 that just happen to contain the word I'm searching for.

1. Click on the **Advanced Search** icon
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"**

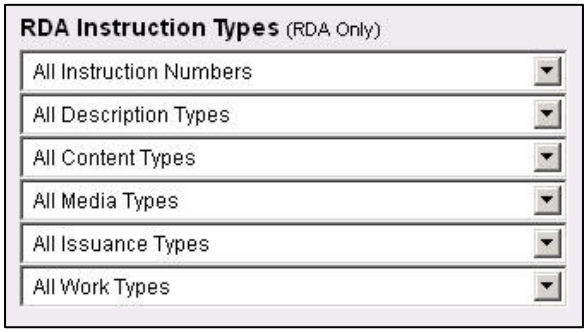
There are only 30 "Results," but there are many more "Hits" -- every example in 19.2, all of which include the phrase "Authorized access point representing the creator."

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.

All Instruction Numbers

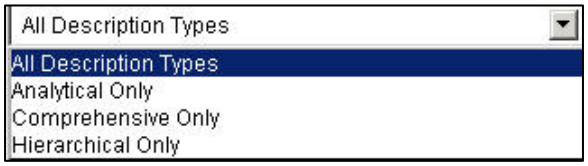
Accept this default, or limit the search to:

- **Core**

All Description Types

Accept this default, or limit the search to:

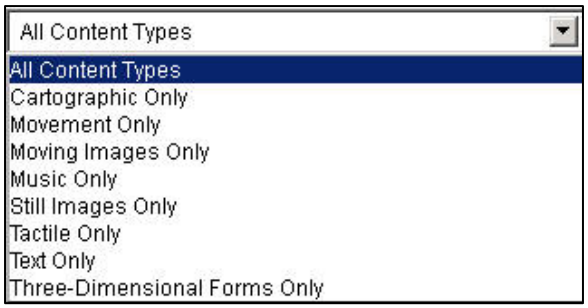
- Analytical
- Comprehensive
- Hierarchical



All Content Types

Accept this default, or limit the search to:

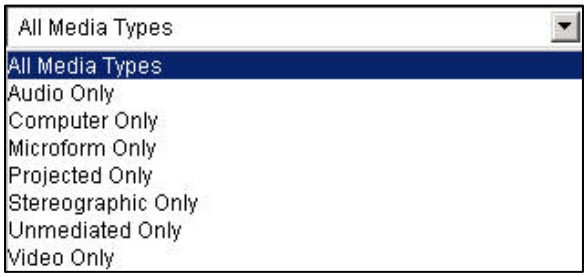
- Cartographic
- Movement
- Moving image
- Music
- Still images (visual or tactile)
- Tactile (movement, music, still image, text, or three-dimensional form)
- Text (notated, spoken, or tactile)
- Three-dimensional forms (visual or tactile)



All Media Types

Accept this default, or limit the search to:

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



All Issuance Types

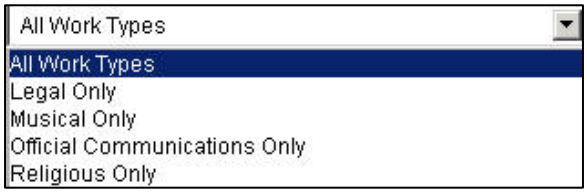
Accept this default, or limit the search to:

- Integrating resources
- Multipart monographs
- Serials
- Single units

All Work Types

Accept this default, or limit the search to:

- Legal
- Musical
- Official communications
- Religious



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 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** icon
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** icon
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 usually 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 this 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?

Unit 4: Personalizing the Toolkit

Managing your User Profile

1. Click on the **My Profile** icon (in the User Menu)

- In the upper portion of this dialog, you can update your profile details, and turn on or off two settings for Toolkit behavior (by default, these settings are "on" (i.e., checked).
  - *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 14. 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.

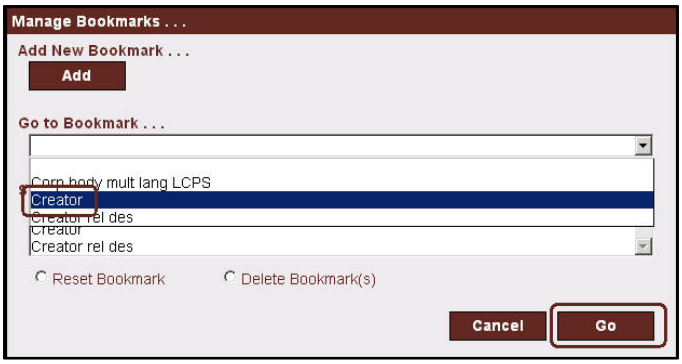
Let's set a bookmark for the Appendix guidelines on Relationship Designators for Creators.

9. Click on the **Advanced Search** icon
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 that this instruction relates to an "attribute" and is discussed somewhere in Chapter 11 of Section 3.

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

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 instructions 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. Another potential advantage of "Saved Searches" is that the search terms are highlighted in the results.

Consider this 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; you then sometimes view one result and sometimes another.

Exercise 15. 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 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. Let's try to narrow this down a bit.

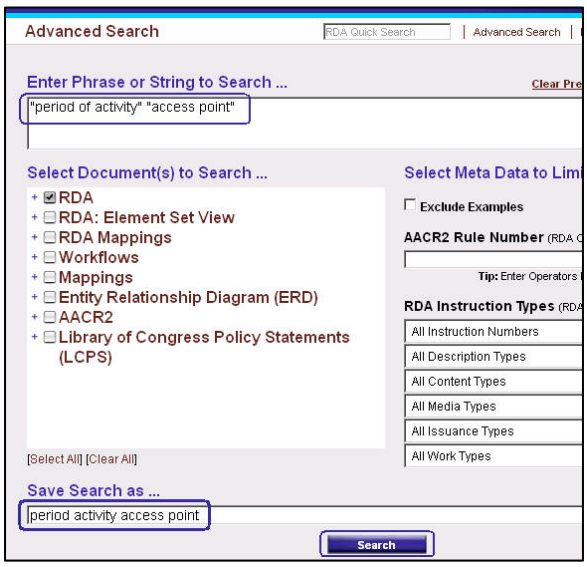
6. Click on the **Advanced Search** icon
7. Type "**period of activity**" **"access point"** in the search box (include both sets of " ")

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

This saves it and performs the search again.

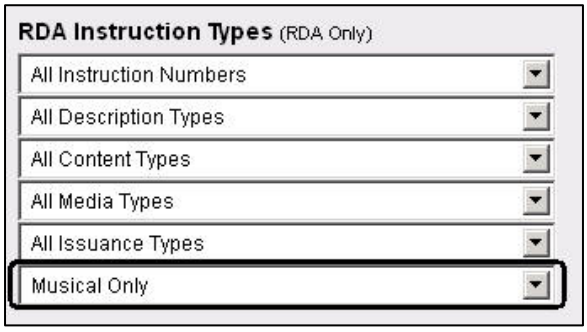


Note: If you had foreseen that sometimes you want to see the 9.3 instructions, and sometimes those in 9.19, you might have saved the previous search, which retrieved both sets.

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** icon
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**

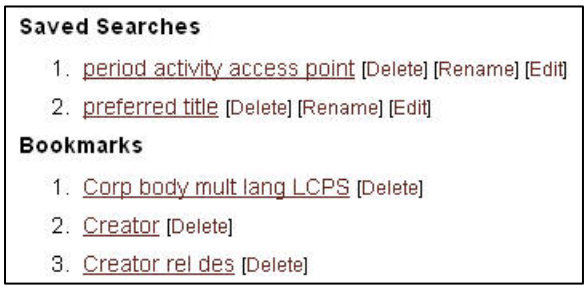
The result is 37 results, but they do not include those in 6.15-6.18.



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

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'

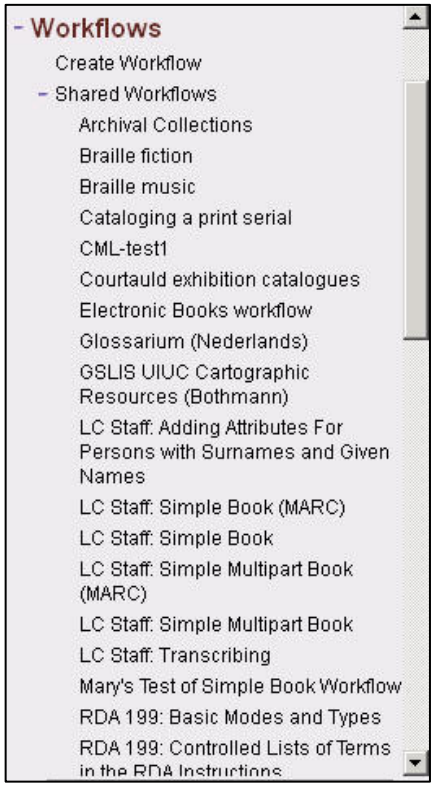
The Toolkit includes two categories of such content: workflows and mapping. In this course, we will look briefly at existing workflows and mappings, but will not create our own.

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.

The Toolkit 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 in your institution ("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 shared workflows users have already created.



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.

➢ Institutions may wish to establish an internal 'vetting' procedure to insure that workflows visible to *all institutional users* ("Subscription") or to *all users* ("Public") convey accurate information. Conversely, all workflows that contain personal reminders or 'job aids' should be designated as 'private.'

Suggested exercise to do on your own:

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**
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 the Workflows, institutions may wish to establish an internal 'vetting' procedure to insure that mappings visible to *all institutional users* ("Subscription") or to *all users* ("Public") convey accurate information. Conversely, all mappings that contain personal reminders or 'job aids' should be designated as 'private.

Suggested exercise to do on your own:

1. **Collapse the Workflows hierarchy**
2. **Expand** the **Maps** hierarchy down to **Shared 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 the MARC data likely to be encountered in records for music scores, to the corresponding RDA instructions, with examples and notes

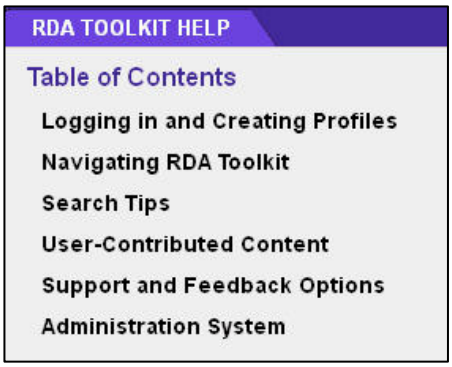
Unit 6: Help, Support, and Other Resources

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 in the Toolkit document pane. From this page, you can open a new "ticket" to send a free-form question to ALA. 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

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

The Toolkit Home page opens in a separate browser tab

✓ In the homepage 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.

1. Scroll down the categories and click on **Tips in Three** (named after, but not related to, AACR2's "rules of three").
2. Click on **Enhancements**
3. Click on **RDA Toolkit**

You are encouraged to view the Blog frequently. If you wish to comment on posts, you will need to create a new account and then login; this takes only a few minutes.

1. Click on **Development**
2. Click on **RDA Toolkit Virtual User Group**

Take a minute to read about the Toolkit VUG sessions. Note that past VUGs are archived.

✓ Click on **Teaching and Training**

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

✓ Click on **Video Help**

ALA is in the processing of creating a variety of short video guides on the subjects listed.

✓ Click on **RDA Toolkit Essentials**

Toolkit Essentials is a bi-monthly webinar with live demonstrations of many Toolkit features.

FAQ

Customer Service 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.

1. Click on the **Tools** tab
2. Click on **Examples of RDA Records (JSC)**
3. Click on **MARC Encoding**
4. Click on the link for **bibliographic records**

The examples are launched 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 a table showing the MARC coding. The bookmarks at the left help you navigate quickly through the examples.

5. Click on the **Back** button in the browser
6. Click on the link for **authority records**

There are 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 a table showing the MARC coding. The bookmarks at the left help you navigate quickly through the examples.

Appendix: Quick Reminders about the RDA Toolkit

- ✓ Remember the two-stage authentication and login procedure. You must first be authenticated into your institutional account; 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.
- ✓ Do not use your browser "Back" and "Forward" buttons for navigation within the Toolkit.
- ✓ Remember to clear your previous search.
- ✓ Do not 'freeze' yourself out of seeing important instructions by searching too narrowly or by using the text filters or instruction types injudiciously.
- ✓ On the other hand, with experience you can search more effectively by carefully selecting only portions of RDA or LCPS to be searched (e.g., a specific section or chapter)
- ✓ Be careful to note whether you are looking at RDA or LCPS.