RDA Best Practices in the Consortial Environment

Presented by
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What we will cover

- ICAT (now Technical Services Committee) and RDA
- History of the Best Practices document
- Highlights of the document
1978
AACR3

- 1997 – Talk began about AACR3
- Needed instructions to catalog all the new materials libraries were collecting
  - Websites, enhanced CDs, eBooks
- 2004 – Work began on AACR3
RDA (Resource Description and Access)

- 2005 – Work began on RDA
- 2010 – RDA was tested and evaluated by the US national libraries
- April 2013 – RDA was implemented by US National Libraries
RDA – Principles based

- A move away from the rigid rules of AACR2
- RDA guides the cataloger to make decisions based on principles
  - More catalogers judgment
- Guidelines that indicate how to describe and provide access to a resource
  - When new formats are introduced, cataloger uses RDA principles
ICAT and RDA implementation

- September 2010
  - ICAT RDA Implementation Subcommittee (IRIS) was formed
  - Began compiling a list of RDA training opportunities

- December 2010
  - ICAT Interim Recommendations for Managing RDA Data in I-Share
  - RDA Resources page established
    - http://www.carli.illinois.edu/products-services/i-share/cat/rda-resources

- April 2011
  - ICAT Spring Forum devoted to RDA
ICAT and RDA implementation

- July 2011
  - ICAT Interim Recommendations for Managing RDA Data in I-Share revised
- ICAT RDA webinars – Nov/Dec 2012
- March 2013 – ICAT Recommendations for Managing RDA Data in I-Share
- May 2013 – CARLI Hands-on Training for Original Catalogers held in the Chicago area and Champaign
Technical Services Committee and RDA Implementation

- Subgroup formed to write RDA Best practices for I-Share
  - Lynn Fields, Deb Morris, Kavita Mundle, Lori Murphy
- Best Practices approved by Technical Services Committee March 2014
  - Work in progress
  - Will be revised as RDA progresses
Technical Services Committee Best Practices for RDA in MARC21

- Intent is to provide guidance on selected RDA options
  - Will look at selected sections from Best Practices
Recommendation:

It is encouraged to follow AACR2 capitalization, but *The Chicago Manual of Style* is also acceptable. It is recommended not to use all capital letters, even if that is what is on the resource. Many libraries use titles in all caps to signify order records, short records, etc. Using AACR2 or *The Chicago Manual of Style* capitalization would avoid confusion in this area.
245 Title $a$ (RDA 2.3)

245 10 $a$ Oxford American dictionary

NOT

245 10 $a$ OXFORD AMERICAN DICTIONARY
245 Title $a$ (RDA 2.3)

245 10 $a$ Only Mr. Darcy will do

NOT

245 10 $a$ ONLY Mr. Darcy WILL DO
245 Title $a$ (RDA 2.3)

245 10 $a$ Chocolate heaven : $b$ irresistible recipes to die for

NOT

245 10 $a$ chocolate heaven : $b$ irresistible recipes to die for
245 Statement of Responsibility $c$
(RDA 2.4)

Recommendation:

Generally do not abridge a statement of responsibility
But

Anthropology and Public Health

Bridging Differences in Culture and Society

Second Edition

Robert A. Hahn, PhD, MPH

Marcia C. Inhorn, PhD, MPH

Oxford University Press

2008

245 10 $a Anthropology and public health : $b bridging differences in culture and society / $c Robert A. Hahn, Marcia C. Inhorn.
245 Statement of Responsibility $c$
(RDA 2.4)

Recommendation:

Generally do not omit names in a statement of responsibility.
245 Statement of Responsibility $c (RDA 2.4)

But

Pharmacotherapy: a pathophysiologic approach / Joseph T. DiPiro [and five others].
245 10 $a Fables. $p Legends in exile / $c Bill Willingham, writer ; Lan Medina, penciller ; Steve Leialoha, Craig Hamilton inkers ; Sherilyn van Valkenburgh, colorist ; Todd Klein ; James Jean, Alex Maleev, original series covers.
245 10 $a Fables. $p Storybook love/
$c Bill Willingham, writer ; Mark Buckingham [and three others],
pencillers ; Steve Leialoha [and three others], inkers ; Daniel Vozzo, colorist ; Todd Klein, letterer ; James Jean, Aron Wiesenfeld, original series covers.
New MARC field - 264

- MARC field 264 – Production, Publication, Distribution, Manufacture, and Copyright Notice
- 2nd indicator is used to differentiate between the different functions
  
  0 = Production
  1 = Publication
  2 = Distribution
  3 = Manufacture
  4 = Copyright notice
264 $a Place of Publication (RDA 2.8.2)

- If more than one place of publication appears on the source of information, only the first listed is required.
  - No longer a requirement to record a place in the home country.
- Transcribe places as they appear on the resource
Recommendation:

Record first place only. If place lacks the higher jurisdiction (state, country, etc.), add it if not present on the resource, and the information is readily attained.
264 $a Place of Publication (RDA 2.8.2)

264 #1 $a Cambridge, Massachusetts
264 $a Place of Publication (RDA 2.8.2)

264 #1 $a Chicago, [Illinois]
264 $a Place of Publication (RDA 2.8.2)

- [S.l.] is no longer used if the place is unknown
- Use instead [Place of publication not identified]
  - LC recommends against this
  - Supply a place if possible
A Model for Academic Change:
SIUE in the 21st Century
50th Anniversary Essays on the Future

Foreword by Paul Ferguson
Provost and Vice Chancellor for Academic Affairs
Southern Illinois University Edwardsville

Afterword by Robert Zemsky
Chair and Professor
The Learning Alliance for Higher Education
The University of Pennsylvania

Edited by Charles Berger
Professor of English Language and Literature
Southern Illinois University Edwardsville
264 $b Publisher’s Name (RDA 2.8.4)

- If more than one publisher’s name appears on the source of information, only the first listed is required.
- Generally do not omit levels in corporate hierarchy
- Include any words indicating function
264 $b Publisher’s Name (RDA 2.8.4)

**Recommendation:**
Record first publisher only in the form listed on the resource, and supply all levels of the hierarchy and any words indicating function.
264 $a Publisher’s Name (RDA 2.8.4)

Studio Thinking 2
THE REAL BENEFITS OF VISUAL ARTS EDUCATION
Second Edition
LOIS HETLAND, ELLEN WINNER, SHIRLEY VEENEMA, AND KIMBERLY M. SHERIDAN
Foreword to the Second Edition by Louise Music
Foreword to the First Edition by David N. Perkins

264 #1 $a New York, NY : $b Teachers College Press, Teachers College, Columbia University
264 $a Publisher’s Name (RDA 2.8.4)

264 #1 $a New York, N.Y. : $b Parents’ Magazine Press, a division of Parents’ Magazine Enterprises, Inc.
[s.n.] is no longer used when the publisher is not identified
Use instead [publisher not identified], but first try to identify the publisher from outside sources
264 $a Publisher’s Name (RDA 2.8.4)

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This could be a publisher statement, but we think it’s just a logo – cataloger’s judgment
For single-part resources, record the publication date as it appears on the resource.

If the resource lacks a publication date, but has a copyright date, the copyright date (if reasonable) can be used to imply a publication date.

If the publication date for a single-part resource is not identified, supply the date or an approximate date of publication.
**Recommendation:**

For resources that lack publication dates, but include copyright dates, use copyright date as an implied publication date.
264 #1 $a New York, New York : $b Bantam Books, $c [1997]
Recommendation:

For resources that lack a publication date and a copyright date, it is strongly encouraged to try to determine a probable date or date range.
264 $c Date of Publication (RDA 2.8.6)

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264 #1 $a [Edwardsville, Illinois] : $b [Southern Illinois University Edwardsville], $c [2007?]
264 $c Copyright Date (RDA 2.11)

- If the resource includes a publication date and a copyright date, and they are the same, the copyright date does not have to be recorded.
- If the resource does not include a publication date or a distribution date, the copyright date is a core element.
Recommendation:

If the publication date and the copyright date are the same on the resource, record only the publication date.
300 $a Extent of item (RDA 3.4.5.2-3.4.5.22)

- Extent of item is a core element in RDA for all textual resources.
- For monographs, very similar to AACR2 except for the spelling out of abbreviations.
300 $a Preliminary pages, leaves, plates and numbered pages (RDA 3.4.5.2)

300 ## $a ii, 214 pages

300 ## $a 24 leaves

300 ## $a 429 pages, 18 pages of plates

300 ## $a 3 volumes

BP p.6
300 $a Unnumbered pages or leaves (RDA 3.4.5.3)

300 ## $a 601 unnumbered pages

300 ## $a approximately 60 pages

300 ## $a 10 unnumbered pages, 270 pages

300 ## $a 1 volume (unpaged)
300 $b Recording Illustrative Content (RDA 7.15.1.3)

Recommendation:
If an item contains illustrative content, record illustration or illustrations, as appropriate. Use the American spelling of “color”.
300 $b Recording Illustrative Content (RDA 7.15.1.3)

300  ## $a 1 volume (unpaged) : $b illustrations (some color)

300  ## $a xv, 34 pages : $b illustrations (chiefly color), maps (some color)

300  ## $a xv, 34 pages : $b 54 illustrations (chiefly color), 3 folded maps
300 $c$ Dimensions of Volumes (RDA 3.5.1.4.14)

- Record the height of the item in centimeters rounded up to the next whole centimeter.
- An alternative is given to record dimensions in the system of measurement preferred by the cataloging agency.
Recommendation:

Use centimeters to record height. If the volume measures less than 10 centimeters, record the height in millimeters and use the metric symbol mm.

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300 ## $a 89 pages ; $c 15 cm
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300 ## $a xii, 435 pages : $b illustrations ; $c 75 mm
```
300 $e$ Resources Consisting of More Than One Carrier Type (Accompanying materials) (RDA 3.1.4)

**Recommendation:**

If an item consists of more than one carrier type, choose one as the predominate form and the other as accompanying material.
300 $e$ Resources Consisting of More Than One Carrier Type (Accompanying materials) (RDA 3.1.4)

300 ## $a$ 1 volume (unpaged) : $b$ color illustrations ; $c$ 29 cm + $e$ 1 audio disc (4 ¾ in.)
New MARC fields – 336, 337, and 338

- The AACR2 GMD (245 $h$) has been replaced by three new elements in RDA:
  - Content type (MARC field 336)
  - Media type (MARC field 337)
  - Carrier type (MARC field 338)
- All three fields are repeatable and may be used to describe accompanying materials as well as the resource itself.
- **Always add these fields.**
336 Content Type (RDA 6.9.1.1, 6.9.1.2, and 6.9)

- A term characterizing the type of material the record describes.
- The term most commonly used to describe a monograph is “text”.
  - 336 $a – Content type term
  - 336 $b – Content type code
  - 336 $2 – Source of code

336 ## $a text $b txt $2 rdacontent
337 Media Type (RDA 3.2.1.1, 3.2.1.2, and 3.2.1.3)

- A term describing the type of device required to view, run, play, or otherwise access the item.
- The term most commonly used to describe a monograph is “unmediated”.
  - 337 $a – Media type term
  - 337 $b – Media type code
  - 337 $2 – Source of code

337 ## $a unmediated $b n $2 rdamedia
338 Carrier Type (RDA 3.3.1.1, 3.3.1.2, and 3.3.1.3)

- A term describing the format of the storage medium and housing of a carrier in combination with the type of device or media type that is required to play or view the content.
- The term most commonly used to describe a monograph is “volume”.
  - 338 $a – Carrier type term
  - 338 $b – Carrier type code
  - 338 $2 – Source of code

338 ## $a volume $b nc $2 rdacarrier
New MARC fields – 336, 337, and 338

336 ## $a text $b txt $2 rdacontent
337 ## $a unmediated $b n $2 rdamedia
338 ## $a volume $b nc $2 rdacarrier
New MARC fields – 336, 337, and 338

336 ## $a text $b txt $2 rdacontent
336 ## $a performed music $b prm $2 rdacontent
337 ## $a unmediated $b n $2 rdamedia
337 ## $a audio $b sd $2 rdamedia
338 ## $a volume $b nc $2 rdacarrier
338 ## $a audio disc $b sd $2 rdacarrier
Notes

- The purpose of notes is to add information not found elsewhere in the record.

**Recommendation:**

RDA does not prescribe an order for recording notes. LC practice is to arrange notes in tag order. Follow LC practice.
246 Varying Form of Title (RDA 2.3.6.3)

- Record variant titles that are considered to be important for identification or access

**Recommendation:**
Record variant titles in MARC field 246.
Cover has subtitle: Irresistible recipes using one of our best-loved ingredients
502 Dissertation or Thesis Information Note (RDA 7.9.1.3)

Recommendation:

Record dissertation or thesis information in the appropriate subfield of MARC field 502. Do not enter information in 502 $a and do not add AACR2 punctuation between the subelements.
502 Dissertation or Thesis Information Note (RDA 7.9.1.3)

- 502 $b$ – Degree type (RDA 7.9.2.3)
- 502 $c$ – Name of granting institution (RDA 7.9.3.3)
- 502 $d$ – Year degree granted (RDA 7.9.4.3)
502 Dissertation or Thesis Information Note (RDA 7.9.1.3)


NOT

502  ## $b M.F.A. $c Southern Illinois University Edwardsville $d 2013
Access Points

Recommendation:

Even though access points are not required for additional creators, all names listed in the 245 $c$ should be assigned access points.
1XX/7XX $e Relationship Designators (RDA 18-22)

- Record one or more terms from the list in RDA Appendix L to indicate what the person’s responsibility is in relation to the resource.
- If none of the terms listed in Appendix L are appropriate, use another concise term to indicate the nature of the relationship.
- More than one term may be added to a name.
1XX/7XX $e Relationship Designators (RDA 18-22)

**Recommendation:**

Use the MARC Code List for Relators
[http://www.loc.gov/marc/relators/](http://www.loc.gov/marc/relators/) to supplement Appendix L.

Although RDA gives permission to add terms not found in a standardized list, it is recommended that only standardized lists be used.
1XX/7XX $e Relationship Designators (RDA 18-22)

100 1# $a Ehrlich, Eugene, $d 1922-2008, $e compiler.


700 1# $a Flexner, Stuart Berg, $e compiler.

700 1# $a Carruth, Gorton, $e compiler.

700 1# $a Hawkins, Joyce, $e compiler.
Corrections or Suggestions

- The Technical Services Committee welcomes your input on this document.
- Send comments to support@carli.illinois.edu
Where To Go For More Help

CARLI RDA Resources

http://www.carli.illinois.edu/products-services/i-share/cat/rda-resources

- Provides a collection of books, articles, webinars, training opportunities, and best practices documents from many sources.

- Kept current by the Technical Services Committee
Questions