RDA Continuing Resources
Serials & Integrating Resources

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https://bit.ly/RDACR

Created 19 June 2013
Modified 22 May 2023

Scope

- Step-through view of a serial with 2 title changes
  - *San Diego Historical Society Quarterly*
  - Generally in RDA rule order
  - Uses MARC 21 examples

- Describing Manifestations & Items
  - Follows RDA Chapters 2, 3, 4

- Describing Works and Expressions
  - Follows RDA Chapters 6, 7

- Recording Attributes of Person & Corporate Body
  - Uses RDA Chapters 9, 11
  - Covers relator terms only

- Recording Relationships
  - Follows RDA Chapters 25, 26

- Employing Provider Neutral Practice

<u>Symbol Chart</u>

 Program for Cooperative Cataloging (PCC) guidance

 Advise local documentation

 LC-PCC PS (Policy Statements)

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Resources

- Program for Cooperative Cataloging. "Provider-Neutral E-Resource MARC Record Guide: P-N/RDA version." September 3, 2019 revision. Washington, D.C. : Program for Cooperative Cataloging, 2019. http://www.loc.gov/aba/pcc/scs/documents/PCC-PN-guidelines.html

- CONSER Cataloging Manual https://www.loc.gov/aba/pcc/conser/more-documentation.html

Special Rules

- 1.6.3 RDA covers integrating resources specifically

- Indicates when new descriptions are required
  - Change in mode (e.g., from serial to integrating)
  - Change in medium (e.g., from print to online)
  - Re-basing (e.g., when a new set of base volumes is issued--see LC-PCC PS)
  - Change in edition

Basis of Identification

- Comprehensive descriptions

- 2.1.2.3 RDA Choose one of the following as appropriate
  - Lowest numbered issue or part
  - Earliest date of issue
  - A source identifying the resource as a whole if sequential issuing is not applicable
  - A source identifying the main part if the concept of ordered parts is not applicable

- If the first/lowest issue/part is not available, make a note identifying the issue or part
  - 588 0# $a Description based on v. 25, no. 1 (spring 2013)
    - *Resource is surmised or known to have begun in 2010, but 2010 issues are not available.*

Preferred Sources for Pages, etc.

- 2.2.2.2 RDA Source of information for Pages, Leaves, Sheets, Cards (or images thereof)

- Use the image of the title page, sheet, or card as your source. If lacking, use in this order
  - A cover or jacket
  - A caption
  - A masthead
  - A colophon
  - Another source in the resource as a whole, preferring formal presentation

Preferred Sources for Other Resources

- 2.2.2.4 RDA Other Resources
  - All resources that aren't pages, etc. or moving images fall here
  - Includes audio recordings, objects, integrating resources like Web sites, etc.

- Prefer
  - *either* a permanently affixed label
    or
  - embedded metadata

- If neither exist, use another source from the resource, preferring formally presented information

Declaring Information from Other Sources

- If information from another source outside the resource is used for
  - Title
  - Statement of responsibility
  - Edition statement
  - Numbering of serials
  - Production, Publication, Distribution, or Manufacture statements
  - Series statements

- Indicate with a note or coding (such as square brackets)

LC-PCC PS General practice is to enclose supplied data in square brackets [ ]

MARC 21 / OCLC Workform

- 2.8.1.1 RDA Consider all electronic resources to be published.

- Form = o

- Integrating resources
  - LDR/06
    - Type of record a (textual) for language
    - Type of record g (visual) for images
  - Continuing Resources workform

- Add 006/00 m for all electronic resources

- 040 ## $a XXX **$b eng $e rda $e pn** $c XXX

PCC CONSER Records

042 ## $a pcc

Can't make changes 😟

Preferred Source

Title from Web page.

Title from caption.

Title from cover.

Title Proper

- 2.3.2.1 RDA CORE the chief name of a resource (i.e., the title normally used when citing the resource).

- 245 10 $a San Diego Historical Society quarterly

- Capitalization is institutional and cataloger's choice
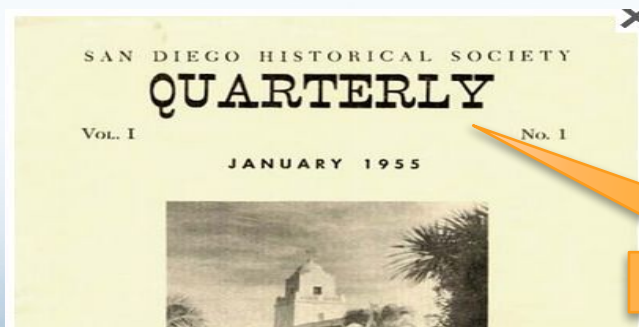
Title from cover.

Note on the Title Proper

- 2.17.2.3 RDA CORE Make a note on the source from which the title proper is taken if it is a source other than:
  - a) the title page, …
- E-journals with title pages do not need a source note.
- All other sources and all websites require a source of title note
  - 588 0# $a Title from JPG cover image.
- Integrating Resources
  - Choose a source of information identifying the current iteration of the resource as a whole (2.1.2.4 RDA)

Tip: Use OLAC's "Source of Title Note for Internet Resources"
https://cornerstone.lib.mnsu.edu/olac-publications/6/

Date of Viewing of an Online Resource

- 2.17.2.3 RDA … For online resources, make a separate note indicating the date the resource was viewed (see 2.27.13.5 RDA)

- 2.17.13.5 RDA For online resources, make a note identifying the date on which the resource was viewed for description.

- 588 ## $a Viewed on February 1, 2012.

- Combine the title source note and the viewed note when you have both:
  - 588 0# $a Title from cover (viewed on December 21, 2012).

Major Title Changes

- Major Changes 2.3.2.13.1 RDA

  - Addition, deletion, change, or reordering of any of the first five words (or six if first is an article) unless the change is minor

  - Addition, deletion, or change of any word after the first five words that changes the meaning of the title or indicates a different subject matter

  - Change of name for a corporate body

Minor Title Changes

- Minor Changes (selected) 2.3.2.13.2 RDA
  - Difference in the representation of a word (eg., &, and, +; edition, ed.)
  - Addition, deletion, or change of articles, prepositions, or conjunctions
  - Difference involving the name of the same corporate body and elements of its hierarchy or their grammatical connection (example: spelled-out form changed to acronym)
  - Addition, deletion, or change of words that link the title to the numbering
  - Addition to, deletion from, or change in the order of words in a list provided there is no significant change in subject matter
  - Addition, deletion, or rearrangement anywhere in the title of words that indicate the type of resource, such as "magazine," "journal," or "newsletter"
  - **In case of doubt, consider the change to be a minor change.**

Title Proper Changes (Serials)

- 2.3.2.12.2 RDA If there is a major change in the title (as defined at 2.3.2.13.1 RDA), create a new description.
    - Treat the new and old descriptions as related

- If there is a minor change in title, treat as a later title proper
    - Notably, RDA does not say what to do with minor changes not considered important for identification
    - Add as a variant title (246 field)

Change in Title Proper (Integrating Resources)

- 2.3.2.12.3 RDA Change the title proper to reflect the current iteration

- Move the former title to a 247 field
  - Add $f with known begin and/or end dates of that title
  - Use angle brackets if necessary

- 245 10 $a OLAC Catalogers Network

- 247 10 $a OLAC : $b Online Audiovisual Catalogers, $f <2005>-2016

Other Title Information

- Transcribe other title information as found on the preferred source 2.3.4.3 RDA

  - 245 ... : $b the journal of San Diego history / $c …

- The source of other title information must come from the same source as the title proper; otherwise, give as a variant title

- Record if it provides clarification or support to the title proper that otherwise might appear misleading without the other title information

- Record frequency as Frequency 2.14 RDA
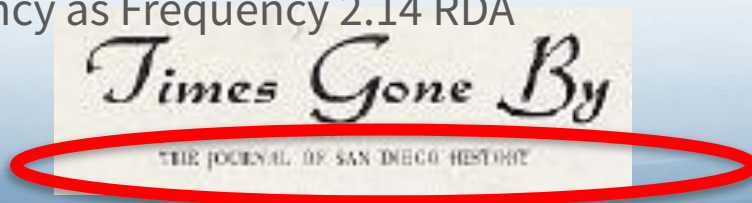
Variant Title

- MARC 21 246 $a

- Transcribe titles that differ from the title proper 2.3.6 RDA
  - Make notes on the source if considered important

- Supply "known as" variants if needed

- Use "cataloguer's judgement"

- Make as many as needed

Statement of Responsibility

- 2.4.1.1 RDA CORE a statement relating to the identification and/or function of [names] responsible for the creation of, or contributing to the realization of, the intellectual or artistic content of a resource.

  - 245 10 ... / $c Minitex.

  - 245 10 $a San Diego Historical Society quarterly.

  - 245 10 $a Journal of chemical education.

Not always needed.
May be part of the title proper.
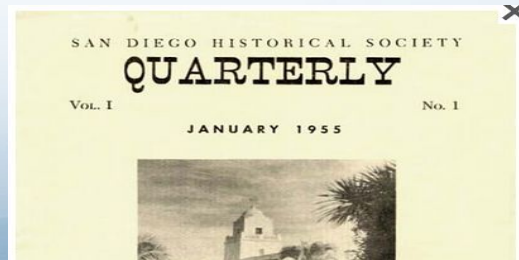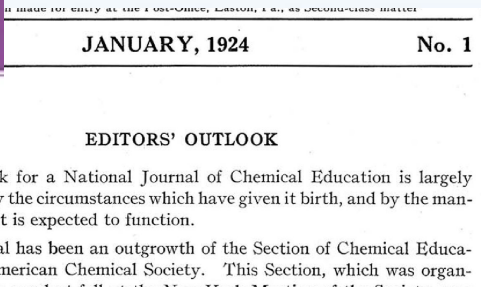
Statement of Responsibility

- Name variations on subsequent issues may be recorded in field 550

  - 550 ## $a Volumes for 1974- published in cooperation with the Kansas State Board of Agriculture.

- Provides warrant for the access point

  - 710 1# $a Kansas. $b State Board of Agriculture.

Edition

- 2.5.1.1 RDA CORE a statement identifying the edition to which a resource belongs

  - Transcribe as it appears on the source of information 2.5.1.4 RDA

- Edition statements must apply to the whole resource 2.5.1.5 RDA

Numbering of Serials

- 2.6.2 RDA CORE Designation of issue

- 1.8.2 RDA LC-PCC PS Form of numerals
  - Record in the form in which they appear
    - Volume X

- Transcribe other words, characters, or groups of words and/or characters as they appear

- Record the numeric and chronologic designation of the first and/or last issue
  - 362 0# $a Volume 1, no. 1 (January 1955)-
  - 362 1# $a Ceased with v. 10, no. 4 (Oct. 1964).

Publication Statement

- 264 #1 $a [San Diego, California] : $b San Diego Historical Society, $c 1955-

- Prefer probable Place, Country, State, Province, Etc. over "Place of publication not identified"

  - Supplied places must be spelled out

- Leave date blank if the first issue of the title is not in-hand:

  - 264 #1 $a [San Diego, California] : $b San Diego Historical Society

Publication Statement

- On current serials, the date must end with a hyphen

- Leave end date blank if last issue of the title is not in-hand

  - 264 #1 $a [San Diego, California] : $b San Diego Historical Society, $c 1955-
  - 362 1# $a Ceased with 1964.

- On ceased serials, the date must end with a period

  - 264 #1 $a [San Diego, California] : $b San Diego Historical Society, $c 1955-1964.

  - 264 #1 $a [San Diego, California] : $b San Diego Historical Society, $c -1964.

First issue was not in-hand and last issue was in-hand..

Publication Statement (Provider Neutral)

- 2.8.1.1 RDA CORE a statement identifying the place or places of publication, publisher or publishers, and date or dates of publication of a resource.

- Record the name of the publisher

- Do not record a provider as a production, publication, distribution or manufacture statement

- Providers include: Ebscohost, Gale, ProQuest

Publication Dates

- RDA allows for approximate dates when the first and/or last issue is in-hand

  - 264 #1 ... $c [1998]-
  - 264 #1 ... $c [between 2000 and 2009?]-

- When first or last issue is not available, do not record a date

- Instead, record the note
  588 ## $a Description based on:

- Date of digitization is not considered; record as note if important

Dates

- Fixed fields: Use c for current, d for ceased, or u for unknown

- If the 362 date covers more than one date, use the later date

  - 362 0# $a 2010/2011-

  - Dates 2011 , 9999

Copyright Date

- 2.11.1.1 RDA a date associated with a claim of protection under copyright or a similar regime.

PCC
- Do not use for continuing resources

Frequency

- 2.14.1.1 RDA the intervals at which the issues or parts of a serial or the updates to an integrating resource are issued.

- MARC 21 field 008/18 and 310 $a

- Record frequency of release of issues using a term from the list provided in RDA 2.14.1.3 RDA
  - If no term is appropriate or frequency is irregular, make a note giving the details (310)
  - Make notes on former frequencies in MARC 21 field 321 $a

- Record dates of a frequency in $b
  - 310 ## $a Quarterly $b 1964-
  - 321 ## $a Semiannual $b 1955-1963

Frequency

- 310 ## $a Frequently updated
  - Freq z or # Regl r

- 310 ## $a Continuously updated
  - Freq k   Regl r

- 310 ## $a Quarterly
  - Freq q   Regl r

Identifier for the Manifestation

- 2.15.1.1 RDA CORE a character string associated with a manifestation that serves to differentiate that manifestation from other manifestations.

- Record any ISSN that applies to the manifestation

    - Don't mix print ISSN on electronic description and vice versa

- 022 ## $a 0022-4383

- Record the Linking ISSN (or ISSN-L) in subfield $l if known

OCLC Connexion Client

- For best results, use the Add 33X macro
- Must have the Fixed Fields, and 006 and 007 fields filled out first
- Automatically assigns Media (337), Carrier (338), and Content (336) fields with $b MARC codes
- Connexion Macro Library
  - Scroll down to AddCommon33X

Content Type

- 6.9.1.1 RDA CORE a categorization reflecting the fundamental form of communication in which the content is expressed and the human sense through which it is intended to be perceived.

- Use a term from Table 6.1 RDA

  - text

- 336 ## $a text $b txt $2 rdacontent

Tip: Use the Connexion macro

Media Type

- 3.2.1.1 RDA a categorization reflecting the general type of intermediation device required to view, play, run, etc., the content of a resource.

- 3.2 RDA LC-PCC PS Core for LC

- Use a term from Table 3.1 RDA

  - unmediated

  - computer

- 337 ## $a unmediated $b n $2 rdamedia

- 337 ## $a computer $b c $2 rdamedia

Tip: Use the
Connexion macro

Carrier Type

- 3.3.1.1 RDA CORE Record the type of carrier used to convey the content of the resource (see inset list)

- 338 ## $a volume $b nc $2 rdacarrier
- 338 ## $a online resource $b cr $2 rdacarrier

Tip: Use the Connexion macro

Unmediated carriers
- card
- flipchart
- object
- roll
- sheet
- volume

Computer carriers
- computer card
- computer chip cartridge
- computer disc
- computer disc cartridge
- computer tape cartridge
- computer tape cassette
- computer tape reel
- online resource

Extent

- 3.4.1.1 RDA CORE the number and type of units and/or subunits making up a resource.
- Provide extent and carrier terms for print formats only if the resource is complete and the total extent is known.

- Current print journal:
  - No 300 present
- Ceased journal
  - 300 ## $a 10 volumes : $b illustrations ; $c 26 cm
  - No 300 on a ceased journal with unknown total extent.

- Current electronic journal:
  - 1 online resource

Extent

- 3.4.1.10 RDA LC-PCC PS record the term indicating the unit for nonprint resources…

  - 300 ## $a microform reels

- … integrating resources …

  - 300 ## $a volume (loose-leaf)

- … or any format that is known to be ceased and the total extent is not known

  - 300 ## $a volumes

Extent for Print IRs

- 3.4.5.19 RDA Apply the qualifier (loose-leaf) to the unit name for print

- 300 ## $a 2 volumes (loose-leaf)
  - When the completeness is known

- 300 ## $a volumes (loose-leaf)
  - When the completeness is not known

- If the updating loose-leaf includes transfer volumes, describe the extent in terms of "loose-leaf" and "transfer."

- 300 ## $a 2 volumes (loose-leaf), 1 volume (transfer)

Digital File Characteristics

- 3.19.1.3 RDA Record the following digital file characteristics, as applicable to the resource, if they are considered important for identification or selection:
  - **a) file type** (see 3.19.2 RDA)
    - audio file | data file | image file | program file | **text file** | video file *also* streaming video file
  - **b) encoding format** (see 3.19.3 RDA)
    - MP3 | Excel | JPG | Arcinfo | **HTML** | **PDF**
  - c) file size (see 3.19.4 RDA)
    - Give file size in bytes, kilobytes (KB), megabytes (MB), or gigabytes (GB), as appropriate.
  - d) resolution (see 3.19.5 RDA)
    - 2048x1536 pixels | 3.1 megapixels
  - f) encoded bitrate (see 3.19.7 RDA).
    - 32 kbps

Digital File Characteristics

- a) file type (see 3.19.2 RDA)
  - 347 ## $a text file $2 rdaft
- b) encoding format (see 3.19.3 RDA)
  - 347 ## $b PDF

- Fixed Fields
  - 008/23 s, o, *or* q   and   007 $a c

Use separate tags for each data element

Use appropriate $2 code if term is in the RDA Registry

Use OCLC Bib Formats to determine when a code may be needed, for example: https://www.oclc.org/bibformats/en/3xx/347.html

RDA 4 Providing Acquisition and Access Information

- Keep it local, not in OCLC

  - Terms of availability   020, 024, 037
  - Contact information   037, 260, 270, 856$m
  - Restrictions on Access   506
  - Uniform Resource Locator   856$u

Rights Statement

- Variously
    - 540 Terms Governing Use and Reproduction Note
    - 542 Information Relating to Copyright Status
- Creative Commons (CC) is not copyright, rather it works with copyright to grant terms of use
- Generally, use the typical CC phrasing
    - 540 ## $a Resource produced by [AGENT] is licensed under a Creative Commons Attribution 4.0 International License. $f CC BY 4.0 $2 cc $u https://creativecommons.org/licenses/by/4.0/
      540 ## $a Resource produced by [AGENT] is licensed under a Creative Commons Attribution-Noncommerical 4.0 International License. $f CC BY NC 4.0 $2 cc $u https://creativecommons.org/licenses/by-nc/4.0/
- Tip: Use the CC License Generator for easy copy and paste https://chooser-beta.creativecommons.org/

Uniform Resource Locator

- 4.6.1.1 RDA URL, is the address of a remote access resource.

- 4.6.1.3 RDA Record the URL for the online resource described
  - May also be the DOI identifier
  - Add or change the URL as appropriate
  - Supply the provider name in $3 when available from multiple providers

- Use $u for URLs that are general (not institution specific). Do not use $z for information that is institution specific. If the domain name is not specific enough, $3 may be used to record package/provider name.

- 856 40 $3 San Diego History Center $u http://www.sandiegohistory.org/journal-san-diego-history/

- 4.6.1.4 RDA LC-PCC PS When a URL no longer functions, add
  - $z Electronic address (http://www.laconi.org) not available when searched on December 21, 2012.

Preferred Title for Work

- 6.2 RDA **CORE** Preferred title for the work is a core element.
- 6.2.2.1 RDA the title or form of title chosen to identify the work. The preferred title is also the basis for the authorized access point representing that work.
- Omit initial articles 6.2.1.7 RDA **LC-PCC PS**
- If the title is not unique, add one of the following elements:
  - Form of work (ex: Online)
  - Date of work
  - Place of origin of work (ex: United States)

- 130 0# $a Work title (Addition term)

Refer to CONSER Cataloging Manual Module 5: Authorized access points for serial works and expressions
https://www.loc.gov/aba/pcc/conser/more-documentation.html

Name Elements

- 18.5.1 RDA Relationship Designator, a designator that indicates the nature of the relationship between a resource and an agent associated with that resource

- 18.5.1.3 RDA Record one or more appropriate terms from the list in Appendix I RDA

- 21.3.1.3 RDA Record a publisher, if considered important for access

- Follow 19.2.1.1.1 RDA to determine if a corporate body is a creator.
  - Do not consider the corporate body to be the creator if there is any doubt that a work falls into any of the categories.

- **110 2# $a San Diego Historical Society, $e creator.**

Recording Relationships

- 24.4.3 RDA Description of the Related Work, Expression, Manifestation, or Item

- Provide a description of the related work, expression, manifestation, or item in one or other of the following forms, as appropriate:
  - a) **a structured description** (i.e., a full or partial description of the related resource using the same order of elements that is used for the resource being described)
  - b) **an unstructured description** (i.e., a full or partial description of the related resource written as a sentence or paragraph).

- That is, make notes as needed related to content in the resource and relationships to other works or expressions.

Related Works
(Structured Description)

- 25.1 RDA Related Work
    - Use 780 for preceding titles
    - Use 785 for succeeding titles
        - *On <u>Times Gone By</u> record:*
        - 780 10 $a San Diego Historical Society. $t San Diego Historical Society quarterly.
        - 785 10 $a San Diego Historical Society. $t Journal of San Diego history.
    - Use 780$t or 785$t for Uniform titles

Related Works
(Structured Description)

- 776 Other Physical Form and 787 Other Relationship Entry

  - $i Relationship information (use Appendix J)

- 776 08 $i Print version: $a Times gone by

- Provider Neutral practice (terms are being fast-tracked)

  - $i Print version:

  - $i Online version:

  - $i <Other format> version:

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Q & A Time

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