Cataloguing with Official RDA from Toolkit to Record: Breaking Down the Workflow

Workshop Whiteboard

Shortened Link:
https://bit.ly/rda-olasc26

QR Code for this Whiteboard:

Wifi network: Instructions are provided onsite at the beginning of the workshop.

Files: Click here to download all files as a zip file.

You are invited to contribute to our Group Notes (OLA SC 2026)

Ontario Library Association Super Conference 2026

Pre-Conference Workshop
Wednesday January 28, 2026
9:30-4:30 pm

Trainers: Thomas Brenndorfer, Susie Jones, Elisa Sze, Ellen Wright
Helper: May Chan

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- RDA Training in Canada Working Group

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Agenda

	me	pic	e Links
	30-9:45	elcome and Introductions	
	45-10:00	eme: “We persist”	
	:00-10:45	nfidence boosters	
	:45-11:00	**ffee/stretch break (15 nutes)**	
	00-11:30	s for reading RDA	
	30-12:00	plication profile: A preview this afternoon	plication profile
	:00-1:15	**nch break (75 minutes)**	
	5-1:30	rvey	
	30-2:00	taloguing demo, using an plication profile	bliographic sample 1 (Link external site) rksheet (Download a copy your computer)
	00-2:30	apping RDA data to MARC	
	30-2:45	rk time: Finish the MARC apping on your own	
	45-3:00	**mfort break (15 minutes)**	
	00-3:15	lution to the MARC mapping ercise	swer key for sample 1: • RDA • RDA in MARC
	5-4:00	rk time: A complete talogue record	bliographic sample 2 eads PDF to download) rksheet (Download a copy

	me	pic	e Links
			your computer)
	00-4:15	lution to the catalogue cord exercise	swer key for sample 2: ● RDA ● RDA in MARC
	5-4:30	osing remarks	

Workshop Content

Welcome and introductions

Workbook page 7

Welcome from Beth Shoemaker, E.J. Pratt Library, Victoria University at the University of Toronto.

Washroom locations:

Vending machines:

Water fountains:

Theme: “We persist”

Workbook page 8

Persistence requires patience, practice, and an understanding that learning is a process or a journey.

Today’s workshop will focus on transforming our *tacit knowledge* about cataloguing (i.e., knowing what to do based on experience) into *explicit knowledge* (i.e., ability to explain to others how to do something). The latter might include being able to justify decisions based on RDA citations, policy statements, and various guidance documents.

To set some expectations, we ask you, as attendees, to take responsibility for your learning. This means active participation and willingness to engage. Be fearless about making mistakes, as we all learn from them.

The learning objectives that we, as trainers, hope to deliver are:

1. Attendees will be able to search for, locate, and cite instructions in the Official RDA Toolkit.
2. Attendees will be able to find policy statements, external metadata guidance documents, or other applicable community documents to supplement the general instructions found in the Official RDA Toolkit.
3. Attendees will be able to distinguish between different recording methods used for recording RDA values.

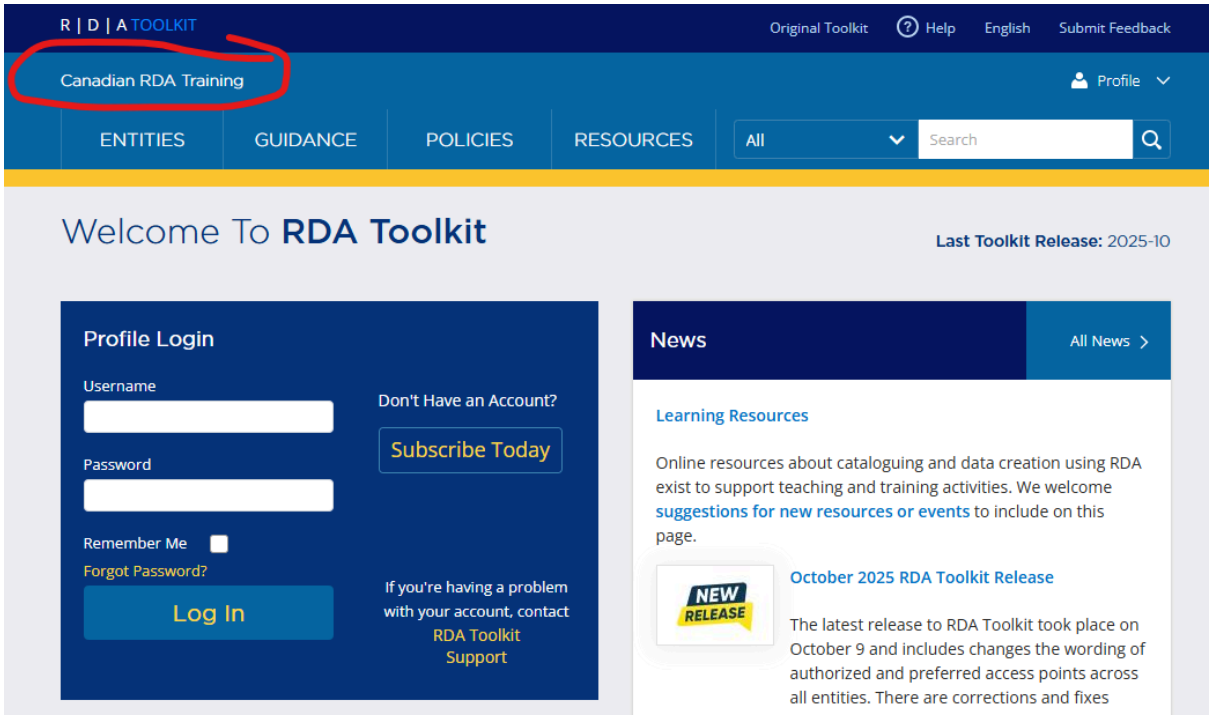
RDA Toolkit Login

Temporary RDA Toolkit access has been provided by ALA Digital.

URL: https://access.rdatoolkit.org
Login ID: rda-ola
Password: *******

This account expires on June 5, 2026.

What you should see once you have logged in: “Canadian RDA Training” will appear near the top left corner of the screen (circled in red in the screen capture):



Confidence boosters

Workbook page 10

Over the next few minutes, we will lay the groundwork for using the Official RDA Toolkit by working through different “building blocks” of knowledge. A challenging aspect of today’s workshop is that you will encounter many new terms. The good news is that if you have been cataloguing for a while, you probably already instinctively know some of this information – it’s just that RDA has packaged the information differently, using terms that will prepare us for linked data applications in the future.

We are going to break down some of the terms now. Let’s get started…

Basic vs. Normalized Transcription

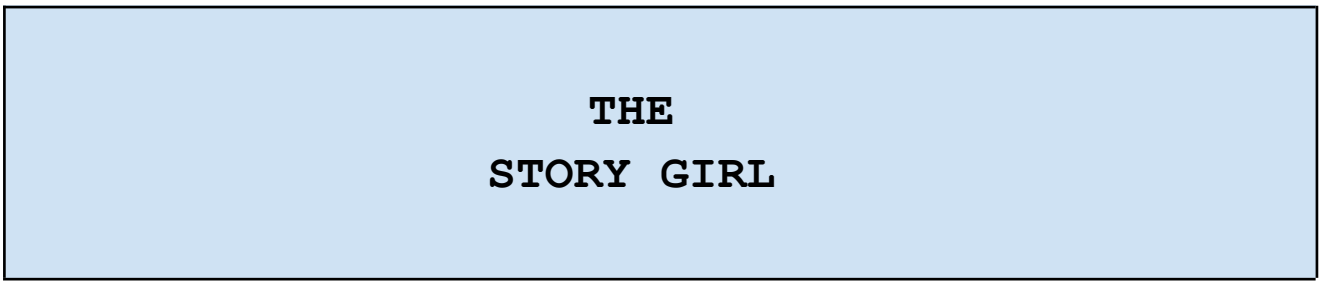
When we catalogue, we often need to copy or transcribe information found directly on the resource we are describing.

Official RDA provides guidelines on 2 different transcription methods, with an option to apply any transcription guidelines:

1. Basic, which requires minimal cataloguer intervention
2. Normalized, which implies conformity to some community guidelines, and requires additional cataloguer’s judgment. RDA offers very general guidance around –
    a. Capitalization
    b. Diacritical marks, language, and script
    c. Letters or words intended to be read two or more times
    d. Numbers
    e. Punctuation
    f. Punctuation of initials and acronyms
    g. Spacing of initials and acronyms
    h. Symbols

    – but RDA leaves it up to cataloguing communities to determine further refinements of those guidelines.

For example, if on the source of information, we see this:



[Internet Archive digitized copy of public domain work: https://archive.org/details/storygirl00mont_2/page/n7/mode/2up]

Under RDA Guidance: Guidelines for basic transcription, we are told to "Preserve the capitalization, punctuation, numerals, abbreviations, and diacritics as they appear on the manifestation. Omit symbols or other images intended to be interpreted as text…"

So, a basic transcription would look like this:

THE STORY GIRL

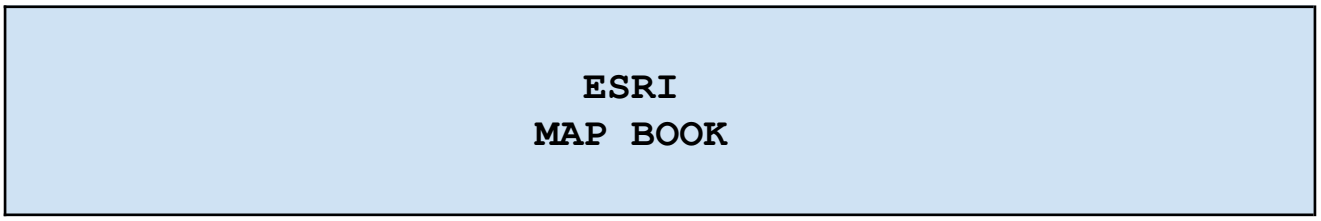
Meanwhile, under RDA Guidance: Guidelines for normalized transcription, we must look through the general guidelines to find applicable instructions. For example, under "Capitalization", there is an option to "Capitalize a word by recording the first letter of the word in uppercase and the remaining letters in lowercase."

So, a normalized transcription would look like this:

The story girl

Now, it's your turn.

Let's say that the source of information looks like this:



And the cataloguer has transcribed this value:

Esri map book

Which transcription method has the cataloguer applied?

(a) Basic
(b) Normalized

Recording Methods

You know about transcription methods now… But, RDA actually permits 4 different methods of recording information (see Guidance: Recording methods), with only some of these methods requiring some degree of transcription.

When we catalogue with RDA, we are really describing a library resource using **elements**. Elements are similar to what you might think of as "fields" of description (for example, "title"), but RDA is more specific about what each element describes (for instance, a "**title of work**" is a distinct element from a "**title of manifestation**" – but, we'll address that distinction later…).

On the other hand, RDA offers more flexibility on *how* the value of each element is to be recorded. For many (though not all) elements, there are 4 possible recording methods:

ecording Method	**hat it is**
nstructured escription	manifestation statement, unstructured note, name or title as appears in sources of information, or uncontrolled term for a ncept. is method is the least machine actionable: although data can processed for keyword searching, it has no direct ationship to controlled vocabulary.
ructured escription	access point, a structured string, a name or title taken from authority control system, a term for a concept taken from a ntrolled vocabulary, or a value associated with a structured ta type. ta recorded using this method can be processed for mewhat targeted searching and filtering of results because it associated with either a *string encoding scheme* (a specific quence of data that may include punctuation) or a *cabulary encoding scheme* (a controlled vocabulary).
entifier	notation or string of characters assigned by an agent to refer an *entity* or concept. ta allows for targeted search and retrieval because it is sociated with a unique identifier system maintained by an ency.
I	identifier based on Semantic Web technologies that is used ecifically as a referent of an entity or controlled term in linked en data using RDF. Basically a "globalized URI". I is for use in specific linked data applications, to act as an tity or concept. It is the most machine actionable in a linked ta environment.

[Table adapted from Template RDA Teaching Slides]

Let's look at examples of recording methods.

Unstructured vs. structured description

Some examples in this section are adapted from Template RDA Teaching Slides.

In RDA, there is an element called **author person**, which allows us to identify the person who authored a work.

Let's say the work being described is manifested as a book, and the book has this title page –

> Anne of Green Gables
>
> by L.M. Montgomery

Perhaps, we want to show that L.M. Montgomery is the author.

For an **unstructured description** of **author person**, RDA says to:

> ecord an unstructured description for a related person as a value of rson: **name of person**." (Citation # 18.23.29.58)

As a value of **name of person**, we might be told by our library community to apply this option:

> tion: "Use any *source of information*. Record the form found in the *source information*." (Citation # 91.77.52.26)

This option under **name of person** (Citation # 91.77.52.36) in conjunction with the earlier instruction we found at **author person** (Citation # 18.23.29.58) essentially give us permission to record this value as the **unstructured description** for our author person:

> L.M. Montgomery

However, if we were trying to record a **structured description** for **author person**, RDA says to:

> ecord a structured description for a related person as a value of Person: **cess point for person**." (Citation # 38.83.99.55)

As a value of **access point for person**, we might be told by our library community to apply this option:

> tion: "Use a *vocabulary encoding scheme* as a *source of information*. [...] tation # 61.33.55.87)

Let's say that the vocabulary encoding scheme we are told to use in our community is the Library of Congress Name Authority File (LCNAF).

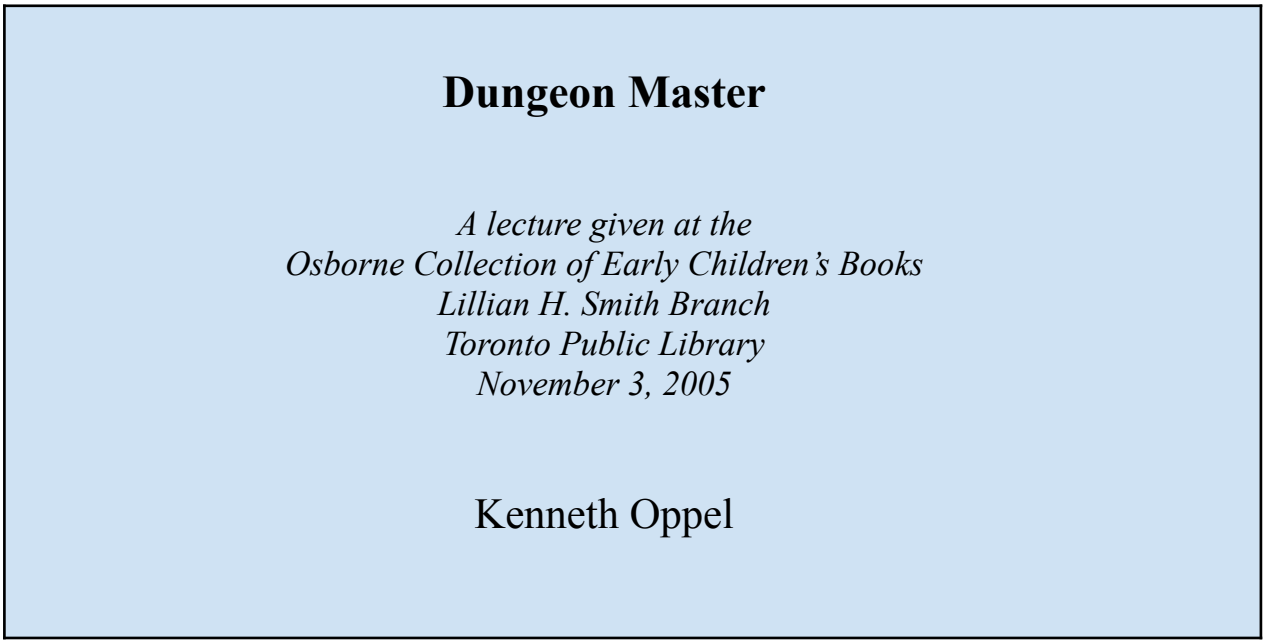
The option under **access point for person** (Citation # 61.33.55.87) in conjunction with the earlier instruction we found at **author person** (Citation # 38.83.99.55) essentially tell us to record this value as the **structured description** for our author person:

> ntgomery, L. M. (Lucy Maud), 1874-1942

[VES used: LCNAF]

Now, it's your turn.

Given the following title page, tell us who is the **author** of the work being manifested:



Dungeon Master

A lecture given at the
Osborne Collection of Early Children's Books
Lillian H. Smith Branch
Toronto Public Library
November 3, 2005

Kenneth Oppel

[Example comes from this source: https://archive.org/details/trent_0116405803192/page/n7/mode/2up]

Unstructured description:

Structured description:

[VES to consult for this workshop: LCNAF, which can be accessed from LC Authorities or LC Linked Data Service]

Identifiers vs. IRI

For many elements, RDA allows you to record an **identifier** instead of a structured or unstructured description. An identifier is a sequence of characters used to identify a concept *or* an instance of an entity. Identifiers are usually controlled for uniqueness by the organization that maintains the system of identifiers.

If we were to record an identifier for our earlier example, L.M. Montgomery, we could use this LC Control Number (LCCN) found in her LCNAF record:

n81018346

[Identifier for person, value of LCCN taken from LCNAF record for that person, https://lccn.loc.gov/n81018346]

Can you cite other common examples of identifiers?

RDA also allows you to record an **IRI (Internationalized Resource Identifier)** as a means of identifying a concept or an instance of an entity. An IRI is a special type of identifier that is used only for linked data applications.

For example, in the Library of Congress Linked Data Service, this URL acts as the surrogate for the person L.M. Montgomery –

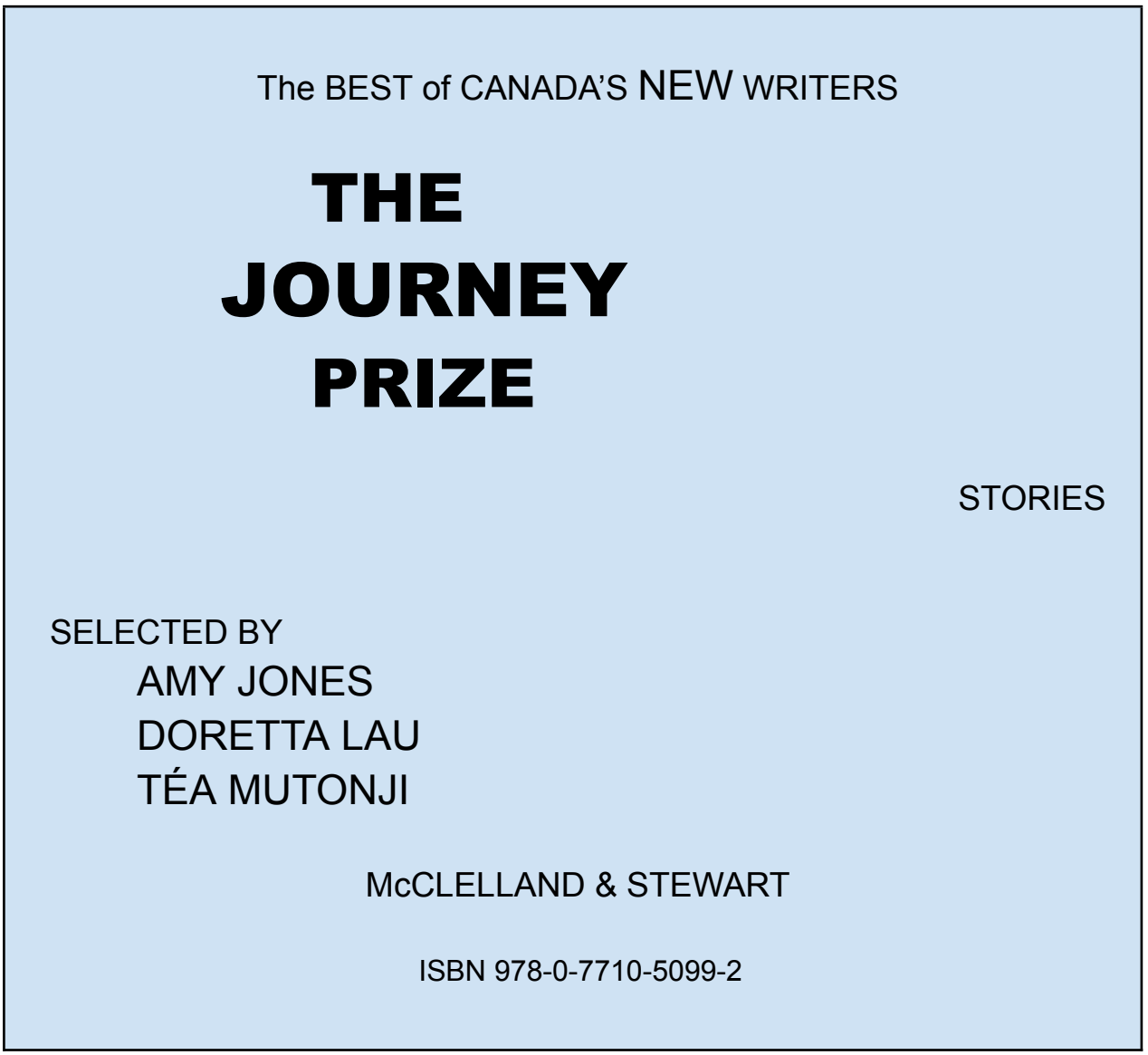
https://id.loc.gov/authorities/names/n81018346.html

[IRI for person, value taken from LC Linked Data Service at https://id.loc.gov/]

– but we would only record this IRI in very specific situations that call for links to be recorded instead of more human-readable data.

Exercise: Identify the recording method

Look at this title page, then fill in the blanks in the table that follows:



The BEST of CANADA'S NEW WRITERS

THE JOURNEY PRIZE

STORIES

SELECTED BY
AMY JONES
DORETTA LAU
TÉA MUTONJI

McCLELLAND & STEWART

ISBN 978-0-7710-5099-2

[For training purposes, this title page has been transcribed from the title page found on the actual resource.]

)A element [hint: the operties or "fields" of scription]	lue of the element, as corded by the cataloguer	nich recording method d the cataloguer use?
e proper	e Journey prize	
atement of sponsibility relating to e proper	ected by Amy Jones, retta Lau, Téa Mutonji	
gregator person *int: this is a person who is sponsible for selecting or anging information found a compilation]*	nes, Amy, 1976-	
entifier for anifestation	80771050992	

Which recording method should cataloguers choose?

How will you know which recording method to apply for each element? If RDA gives you multiple options, then check your community's guidelines or policies. Later today, we will show you some examples of community guidelines and policies.

Application profiles (RDA Glossary definition: "a specification of the metadata that is used in an application") may also tell cataloguers which recording method to apply to each element listed in the profile. We will work with an example of an application profile in today's workshop.

Work, Expression, Manifestation, and Item

Workbook page 20

Every library resource in our collections can be thought of in terms of Work, Expression, Manifestation, and Item ("WEMI"). These 4 *entities*, or abstract classes, are likely familiar to you, even if you are not used to referring to entities by their labels.

A **work** is a "distinct intellectual or artistic creation". For example, *The English Patient*, a novel by Michael Ondaatje, is a work.

An **expression** is the **realization** of a work. The **content** can be realized as sound, still or moving images, choreographed movement, musical notation, or alpha-numeric characters (such as text). For example, the original English text of *The English Patient*, as well as a French translation of that text would be considered different expressions of the same work.

A **manifestation** refers to the **embodiment** of an expression, usually through the act of publication, production, or manufacturing. The first published edition of *The English Patient*, published in September 1992 by McClelland and Stewart, is an example of a manifestation. Often, manifestation descriptions are focused on representing the **carrier** that holds content.

An **item** is any single **exemplar** of a manifestation – for instance, a **copy** of a publication. A rare book library that owns a copy of the first published edition of *The English Patient* dated September 1992 would be said to own an item.

Exercise: Identify the resource entities

Read the following conversation, and identify the Work, Expression, Manifestation, or Item entities referenced in the conversation:

User: Hi, do you have *Wicked* here?

Reference staff: Can you tell me more please? Are you looking for the novel by Gregory Maguire, a recording of the musical, or the movie…?

User: I want to know if you have songs from the musical, with lyrics and music notes.

Reference staff: I see. It sounds like you might be looking for a songbook or a score, if I understand correctly. Are you looking for specific arrangements of the songs?

User: For voice, with piano accompaniment. Well, for easy piano, preferably. It's not urgent. I just want to learn to play some of the songs.

Reference staff: Ok, let's take a look at the public catalogue together. We'll check if we have a vocal score with easy piano accompaniment at one of our branches. If we have a copy here, you can borrow it today. If we have a copy at another branch, I'll show you how to place a hold to have the copy delivered here. How does that sound?

User: That sounds great! But what if the library doesn't have a copy at all?

Reference staff: We can see if there's a copy available through interlibrary loan. Let's start with our catalogue.

Works:



Expressions:



Manifestations:



Items:



RDA also provides instructions for describing other entities, though those descriptions will not form the focus of today's workshop. Those entities are:

Agent = An entity "capable of deliberate actions, of being granted rights, and of being held accountable for its actions." Agents are categorized into 2 subtypes:

- **Person** = An individual human being "who lives or is assumed to have lived."
- **Collective agent** = A gathering or organization of two or more persons, that can be identified by a name, and that acts as a unit. Collective agents can be 1 of 2 subtypes:
    - **Corporate body** = A collective agent organized for a common purpose.

    - **Family** = A collective agent whose members are related by birth, marriage, adoption, civil union, or similar legal status, or who present themselves as a family.

Place = Any “given extent of space” that reflects the physical world.

Timespan = Any “finite period of time”. A timespan has a beginning and an end, and reflects the physical world.

Nomen = An entity that tells us that there is an association between (1) a name, title, access point, or identifier **and** (2) one of the other RDA entities that we just looked at above. We will look at nomen next…

Nomen vs. appellation

Workbook page 23

A nomen is an entity that tells users and systems that there is an association between a name, title, access point, or identifier **and** one of the other RDA entities.

Let’s say that you see this string of characters on a screen:

Sunshine Sketches of a Little Town

What does this string mean? What is it referring to?

If you are familiar with Canadian literature, you might know that it is the title of a work of fiction by Stephen Leacock. If you did not know of this work, this string would not have meant anything. This string does not convey meaning until one learns that it corresponds to the title of a work. It is this association between the string of characters (called a *nomen string*) and an entity (such

as work, expression, manifestation, item, agent, place, or timespan) that gives us the Nomen entity.

Now, you might be wondering *why* Nomen is an entity at all, as opposed to just a relationship element. Well, the reason is that in an entity-relationship model, only entities can be described with elements. Elements cannot be further described. So, if you wanted to say something more about the string "Sunshine Sketches of a Little Town" – for instance, that the language of the nomen string is English – you *can* because Nomen is an entity.

Conversely, when you are describing a work, expression, manifestation, item, agent, place, or timespan, it would be nice to be able to name or cite that entity specifically. Instead of saying, "you know, that work by Leacock that's really famous, I forget what it's called", it's much clearer to say "Sunshine Sketches of a Little Town." Specifying a name or title for an entity, or an access point, or an identifier, allows you to be clear about the entity you are talking about.

Names, titles, access points, and identifiers are all examples of **appellation** elements, and the value of appellations is borrowed from the value of nomen strings. In essence, appellation elements are relationship elements (the relationship is between an RDA entity and a Nomen).

To summarize, appellations are elements used to record a name, title, access point, or identifier for an RDA entity.

In the RDA Toolkit, a typical "Recording" instruction under any appellation element will include this stock phrase:

> "Record this element as a value of Nomen: nomen string or as an instance of a Nomen."

In a MARC bibliographic environment, we do not create records for individual nomens, though we use their nomen strings to populate our appellation elements like title proper, preferred and variant names, authorized and variant access points, and identifiers.

Don’t worry if this doesn’t make total sense at this point – we will come back to the concept of appellation elements later.

Exercise: Identify the RDA entity

Take a look at the partial metadata description sets below and identify the **RDA entity** that is being described.

Metadata description set #1: An entity known by the University of Toronto catalogue record number 991106530965706196

title proper = Sunshine sketches of a little town
statement of responsibility relating to title proper = by Stephen Leacock
place of publication = Toronto
name of publisher = McClelland and Stewart
date of publication = 1931
work manifested = Leacock, Stephen, 1869-1944. Sunshine sketches of a little town

Metadata description set #2: An entity known by the LCCN n50042556

date of birth = 1869
date of death = 1944
authorized access point for person = Leacock, Stephen, 1869-1944
variant access point for person = Leacock, Stephen Butler, 1869-1944
author person of = Sunshine sketches of a little town
author person of = Elements of political science

Metadata description set #3: An entity known by the string “Leacock, Stephen, 1869-1944”

nomen string = Leacock, Stephen, 1869-1944
scheme of nomen = LCNAF/LC-PCC string encoding scheme
authorized access point for person of = The mentioned in Metadata description set #2
language of nomen = English



Minimum description for Manifestation

Workbook page 27

What is a *minimum description*? A *minimum description* is “a description that is the least data required for a well-formed metadata description set” (RDA Glossary definition). While the RDA Toolkit details the meaning of *well-formed* (see Guidance: Well-formed RDA), for the purpose of this workshop, we will summarize: each RDA entity has a short set of elements that *must* be recorded in order for a known entity to be identified. For descriptions of Work, Expression, or Manifestation entities, a minimum description must also indicate a primary relationship between:

- A work and an expression, or
- A work and a manifestation, or
- An expression and a manifestation.

For an entity description to be considered “RDA conformant”, the elements listed in the “Minimum description” requirements are the only elements that must be recorded for that entity. Communities are welcome to go beyond the *minimum description* to create an *effective description* that helps users fulfill all 5 user tasks (Find, Identify, Select, Obtain, and Explore), but RDA does not mandate effective descriptions. (Note: Always check with your community to confirm which elements to include in a description. We’ll talk more about this when we get to *application profiles* later.)

For those who have catalogued using the original RDA Toolkit, you will be familiar with the concept of “core” and “core if” elements. “Core” and “core if” elements are no longer designated by RDA. Decisions about what is “core” to a description are now made by communities – and communicated through policy statements or metadata guidance documentation maintained by communities.

We will look at policy statements later, but for now, here are some quick examples of what “core” and “core if” policy statements can look like:

- Library and Archives Canada “core” example: RDA citation # 26.09.89.56

- Library of Congress/Program for Cooperative Cataloging (LC-PCC) “core if” example: RDA citation # 30.68.33.08

Let’s look up the minimum description requirements for the Manifestation entity.

To do this, navigate to the “Entities” menu >> Manifestation

- Read the “Definition and Scope”.
- Read the “Prerecording” section to get a sense of what the word “manifestation” can refer to in RDA.
- Note these sentences: “In RDA, transcription of data from the source ensures that, where applicable, the data reflects how a manifestation represents itself. Transcription can also function as a means of differentiating one manifestation from another.” (RDA # 55.71.14.52)
- Keep scrolling down until you see the section header “Minimum description”.

Read through the *minimum description* requirements, then answer this multiple choice question:

Which combination of elements would enable you to fulfill the minimum description of a manifestation?

(a) Appellation of manifestation
(b) Appellation of expression
(c) Appellation of work
(d) Appellation of manifestation and appellation of expression
(e) Appellation of manifestation and appellation of work
(f) Both (d) and (e)
(g) Either (d) or (e)

Exercise: Evaluate a record for minimum description requirements

Does the following brief record meet the minimum description requirements for a manifestation? Why or why not?

RDA metadata description set, presented without MARC 21 encoding:

RDA element	**Value recorded**
title proper	Blame this on the boogie
statement of responsibility relating to title proper	by Rina Ayuyang
place of publication	Montréal, Québec
name of publisher	Drawn & Quarterly
date of publication	2018
copyright date	©2018
identifier for manifestation	9781770463189
work manifested	Ayuyang, Rina. Blame this on the boogie.

The same metadata description set presented in MARC 21 Bibliographic format:

```
0 ## $a 9781770463189
0 1# $a Ayuyang, Rina, author.
5 10 $a Blame this on the boogie / $c by Rina Ayuyang.
4 #1 $a Montréal, Québec : $b Drawn & Quarterly, $c 2018.
4 #4 $c ©2018
```

Explanation:

Tips for reading RDA

Workbook page 30

The “information architecture” of the RDA Toolkit

Let’s take a tour of the RDA Toolkit.
The RDA Toolkit includes **Help** pages to assist users in navigating and searching the Toolkit effectively. The Help page called Navigating RDA Toolkit summarizes categories of content and features available.

When you first arrive at the RDA Toolkit, you’ll find a Profile Login box to access the Toolkit, a Recently Updated Instructions box, a News box and a Content Tab menu and search bar at the top of the webpage, that looks like this:



Each **Content Tab** has a drop-down menu that you can view when you hover your cursor over it.

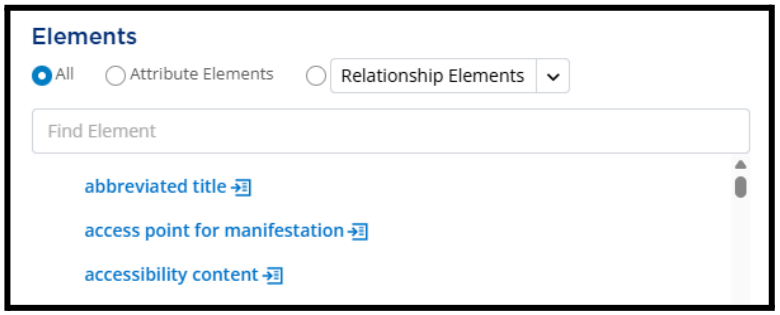
The **Entities** menu lists the thirteen RDA entities. To view an entity page, click on the Entity name.

Once you have navigated to an **Entity page**, you will find information on the:

- Definition and Scope
- Prerecording
- Minimum description

- Effective description
- Entity boundary
- Recording methods
- Elements

Elements are located at the bottom of the Entity pages.



You can scroll through the list of elements or use the search box to locate a specific element. You can also filter by all elements, attribute elements or by relationship elements or entity elements.

Click on the element to navigate to the element page.You can use the “breadcrumbs” at the top of the element page to know where you are in the hierarchy of the Toolkit to provide context.



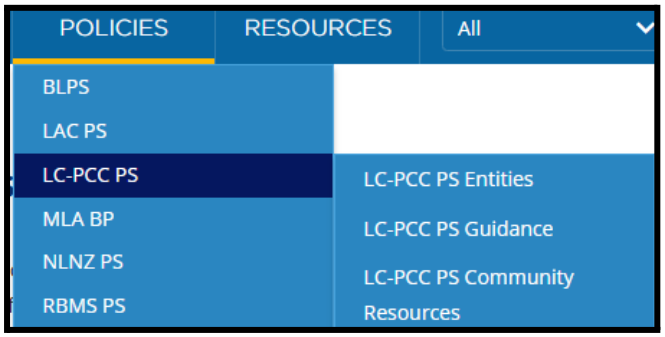
On the Element page, you will find the:

- Definition and Scope
- Element Reference card
- (Sometimes) Prerecording
- Recording instructions
- Recording instructions specific to individual recording methods
- and Related elements

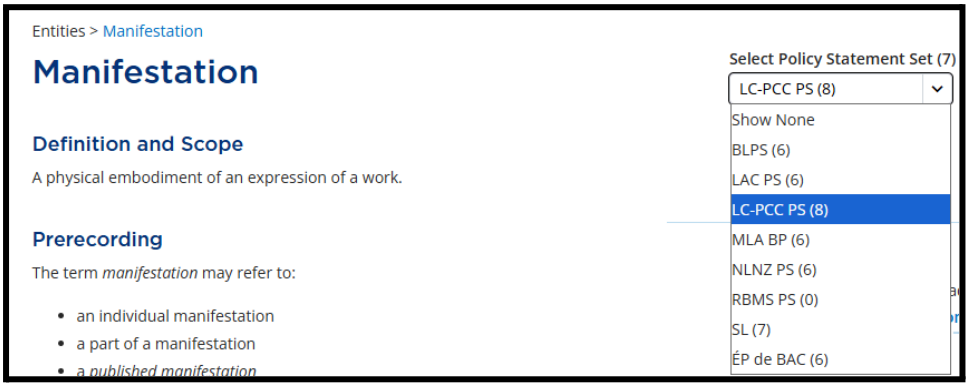
Now it’s time to look at the **Guidance menu**. This menu contains general information and instructions for 18 topics, listed alphabetically after the

Introduction to RDA. You will find pages like “Resource description”, “Aggregates”, “Application profiles”, “Data provenance”, and more. Specific instructions for elements are located in the “Recording” section of element pages. (Note: You can toggle between the default alphabetical view of Guidance topics or a thematic view of the topics. See Help > Personalizing RDA Toolkit for instructions on how to do this.)

The **Policy menu** is located to the right of Guidance. Policy statements are instructions created by specific communities to help their members interpret and apply RDA. The Policy menu includes policy statements from institutions that have elected to publish in the RDA Toolkit, like LC-PCC (Library of Congress / Program for Cooperative Cataloging) and LAC (Library and Archives Canada). If you hover over the policy creator (LC-PCC for example) another small menu to the right will appear.

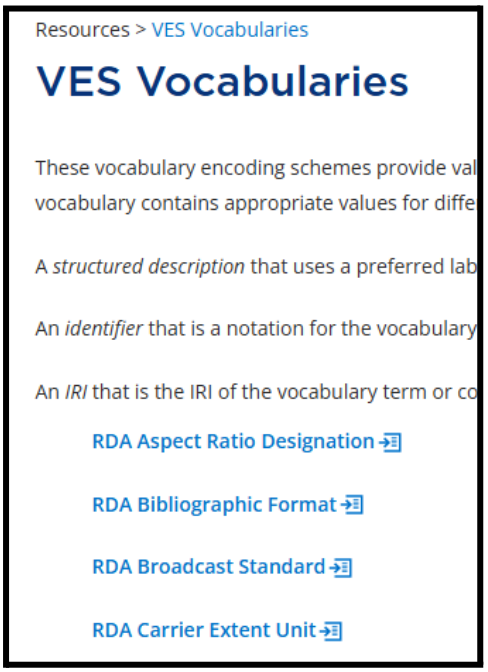


From here, you can navigate to the specific entity, guidance, or community resource policy statements. Policy statements can also be located by selecting the Policy Statement Set on Entity and element pages:



This allows you to see the policy statement alongside the general instructions or options to which they apply. Policy statements may identify which elements to use or not use. When multiple options or condition-options exist, the policy statements indicate which instructions to apply or prefer.

The last Content Tab is called **Resources**. In this dropdown menu, you'll find:



- the Glossary
- VES Vocabularies
- Community Resources
- Revision History
- Original Toolkit
- AACR2

Community resources contain supplementary guidance or instructions for communities and fall into 2 types: **Partner** organizations that already manage official translations and policy statements and **Contributing** organizations that create documents using the RDA Toolkit HTML Editor with approval from RSC.

The **VES (Vocabulary Encoding Schemes) Vocabularies** lists the sets of controlled terms that can be used with particular RDA elements. When the opportunity to apply an RDA VES arises, the option will appear in the associated element page. (We hope to demonstrate that with at least one of the elements today.)

The last section of the Content Tab menu is the **Search box**. There is a dropdown menu that allows you to limit results by:

- All (the default)
- RDA only
- Policies

- Exact Title
- Glossary

To use the search box itself, type in the term you are looking for and a search result page will appear. You are able to filter by type of RDA documents:

- Entities
- Elements
- Glossary
- Guidance
- Resources

You can also filter by Policies and change the Sort by options (Relevance or A-Z). Read Searching RDA Toolkit for search basics, how to narrow a search, and special search options. An example of a special search option is to search by MARC21 fields, indicators, and subfields.

To search for a MARC field:

- In quotations:
  - use the MARC field number
  - use an asterisk for empty indicators
  - use a dollar sign as a delimiter

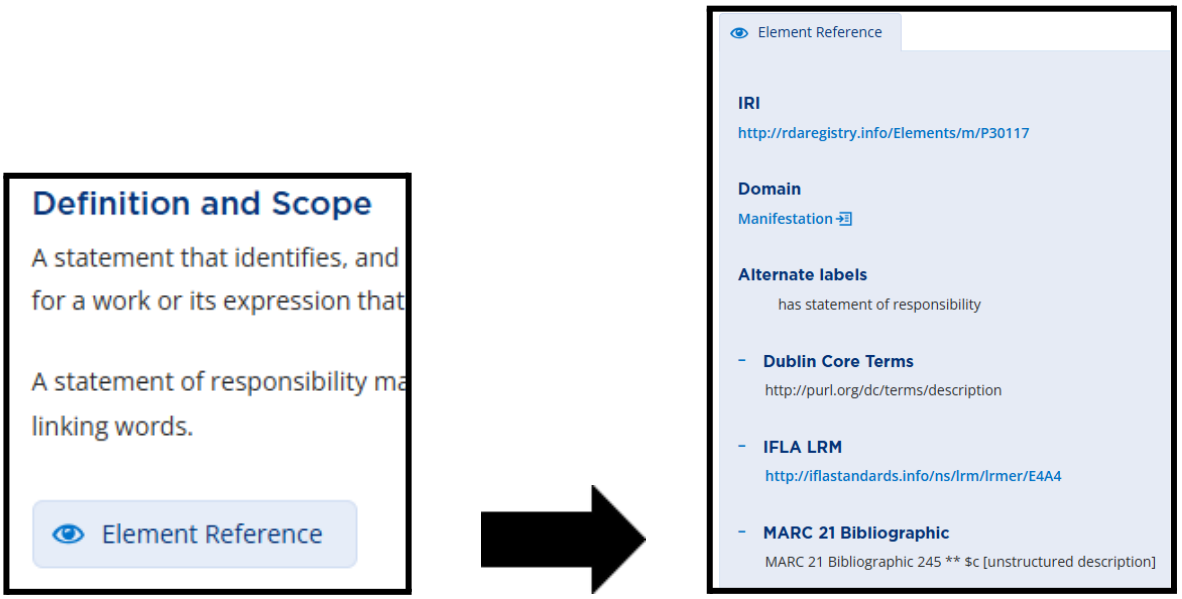
For example: “245$c” returns 3 results for Element pages on statement of responsibility. There are Search tips for looking up instruction numbers from the Original Toolkit and Citation Numbers from the Official Toolkit, which we will talk more about soon.

The “Element Reference” card

Workbook page 35

We briefly talked about the Element Reference card during our tour. Let's take a closer look to see what’s included in the card, using Manifestation: statement of responsibility as an example.

On every Element page, you will find the Element Reference card at the top of the page just below the Definition and Scope section. If you click on the button that says Element Reference with the eye icon, it will expand:



It’s important to check the element card before moving ahead to the recording methods to make sure you are looking at the correct element. The Element Reference card includes:

- the IRI for the element
- the Domain
- the Range if applicable
- Alternate labels
- Dublin Core Terms
- IFLA LRM link
- the MARC 21 Bibliographic field

You can check the **Domain** to make sure you are describing the right entity. In this case, the statement of responsibility is describing the manifestation. Attribute elements are limited to describing the **Domain**. Some Element

Reference cards include **Range**; these elements are relationship elements**.** Relationship elements explain how the RDA entity you are describing (the Domain) relates to another RDA entity (the Range) (for example, you might see Nomen, Person, Place, or Timespan included in the Range).

Take a look at these examples and tell us if the elements implied by the examples have a domain and range in RDA, and use that to determine if we are describing relationship elements or attribute elements:

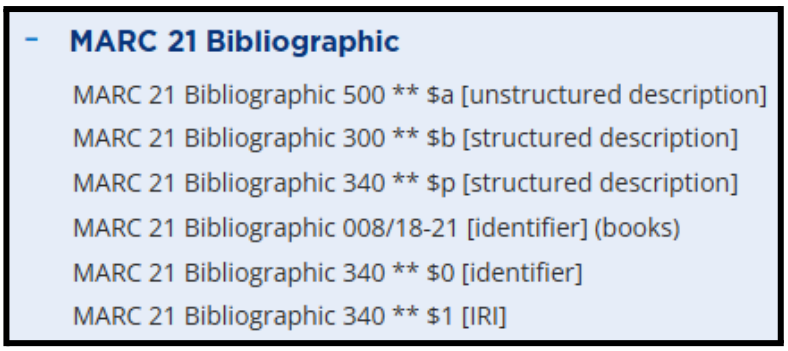
1.	This print book was published in Toronto, Ontario

Domain?	**Range?**	**Element type:**

2.	This print book has illustrations

Domain?	**Range?**	**Element type:**

It's also important to note that the **MARC21 Bibliographic mappings** are located in the Element Reference card. When we mentioned searching by MARC21 field in the search box in the last section, this is where that information is pulled from. For the element you're looking at, the MARC21 mappings will list every MARC21 field and subfield that corresponds to that specific element, and which fields the options for the element can be applied to. It's a great way to find out the recording methods that correspond to the specific MARC fields as well. Take a look at this example from the illustrative content element page:

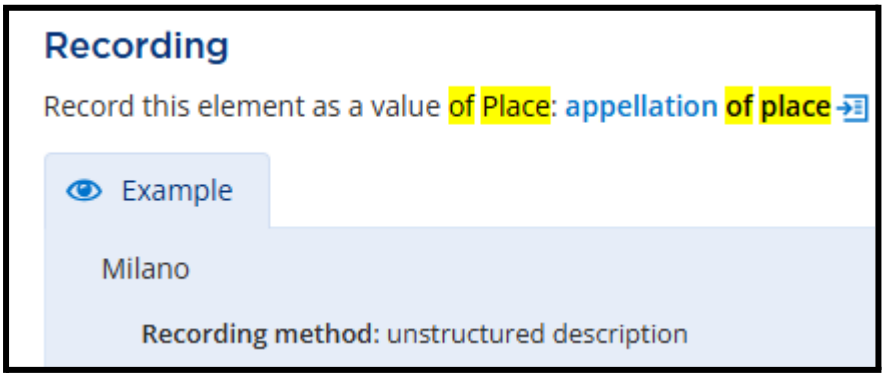


General recording instructions vs. specific options and condition-options

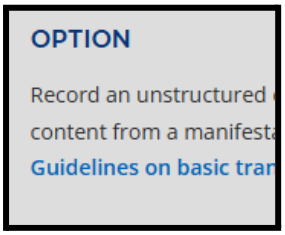
Workbook page 37

General recording instructions appear against the standard white background, and looks like it's part of the "regular" page text. These are the instructions we're following. The general recording instructions are separated into Prerecording and Recording instructions.

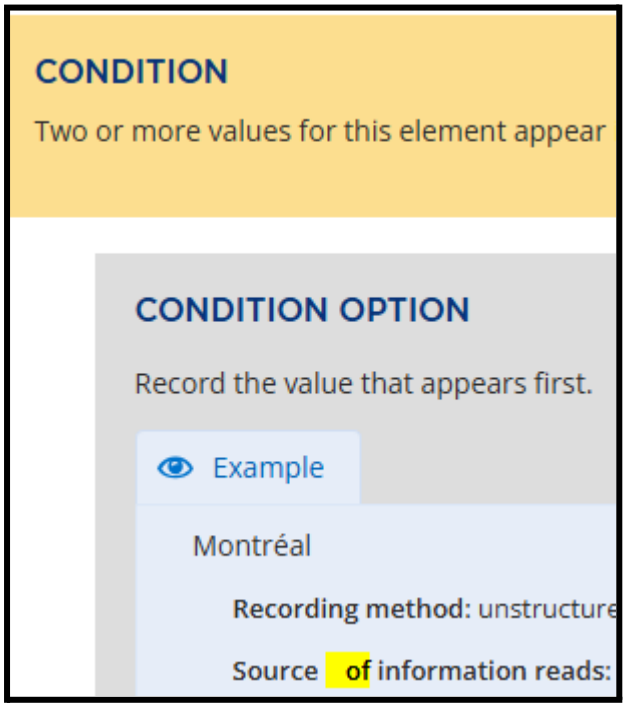
- The **Prerecording** instructions help us decide if the element is appropriate or if another element should be used. Policy statements from different communities might add specific instructions. For example, LC-PCC indicates if the element is core and it might include a link to relevant Metadata Guidance Documentation (which we will talk more about later).
- **Recording** instructions, on the other hand, provide information on how to record a value for the element. Sometimes there will be an Example card with the eye icon that can be expanded to show examples of recording instruction:



Options: These are exactly that, options. We can choose to apply or not apply options. The decision to apply an option is based on local policy and Policy Statements. They are independent of Conditions. How can you tell that it's an Option? They are the Grey boxes labeled "OPTION" and they are not indented. There are general recording Options, as well as recording options for the different recording methods.



Condition / Condition Option: If all the conditions within a box apply to a situation, we can apply one or more of the options listed under the condition provided local policy permits it. How can you tell it's a Condition Option? The Conditions are in yellow boxes labeled "CONDITION", the condition-options are paired with the Condition boxes, they are the grey boxes indented with the label "CONDITION OPTION."



Options aren't mutually exclusive, sometimes we can apply multiple options if they apply to the situation.

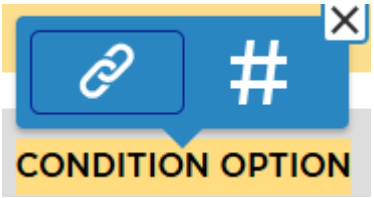
We should note that the RDA Toolkit is updated 3 times a year, based on international review and approval. To facilitate updates and addition of new options, or removal of outdated options, numbered rules are no longer used as an organizational structure, allowing for better flexibility for updates.

Demo: How to pull up a citation number or a URI for a specific instruction, option, or condition/condition-option

Workbook page 39

Now that we've looked at how element pages are set up, let's go over how to cite specific instructions, options or condition/condition-options. Being able to refer back to a specific instruction can be useful when creating and using application profiles, or training others. It's important to note that on Entity and element pages, citation numbers and links can only be generated for text outside of the "Definition and Scope" area. Citation numbers do not generate for terms in the Glossary section.

Let's pull up the Pop-Up Toolbar to create a link or view a citation number for a specific option or condition/condition option.

1. Locate the element page. For this demonstration, we will use the element page for place of publication.
2. Identify the Condition Option (or another instruction you'd like to reference). In this example, let's say that we have two places of publication on a title page, Toronto and New York. We see the first Condition box applies to this scenario: "Condition: Two or more values for this element appear in the *source of information*." Based on the Policy Statements my library follows, I would choose to apply the first Condition Option listed: "Record the value that appears first." This is the Condition Option we'd like to reference in our application profile.
3. To pull up the Pop-Up Toolbar, highlight the text in the grey Condition Option box.
4. This is what will appear: 

5. Click on the link button to generate a URL that can be copied into another document.

6. Or click on the number symbol to generate the citation number. You can also copy this citation number into another document. For this Condition Option the citation number is 33.37.34.05.
    a. Tip: the citation number can then be used in the Search box. The search result will pull up the element page and automatically scroll to the specified Condition Option (or instruction).

Let's practice!

Go to the element page for title proper.

Take a look at the element page and find an example of a Condition you have encountered before. Follow the steps we just went through and generate the citation number for that Condition.

tation Number	

"Appellation…" instructions

Workbook page 40

We talked briefly about appellations when we introduced you to "Nomen". Now, we're going to take a deeper dive.

When we describe a work, expression, or manifestation entity, we will encounter instructions to record an **appellation** element for that entity, since every entity needs to have some kind of name, title, access point, or identifier that library users and staff can reference.

In RDA Toolkit, a typical "Recording" instruction under any appellation element will include this "boilerplate" phrase:

Record this element as a value of Nomen: **nomen string** or as an

instance of a **Nomen**.

Depending on the entity being described (as well as community policies), an **appellation** element will be narrowed down to one of these element subtypes:

- For an appellation that uses *unstructured description* as the recording method: **name of [entity]** or **title of [entity]** element
- For an appellation that uses *structured description* as the recording method: **access point for [entity]** element
- For an appellation that uses *identifier* as the recording method: **identifier for [entity]** element

For example, recall that when we provide a *minimum description* of a manifestation (Citation # 22.85.24.59), we must reference either the expression or the work that is embodied in our manifestation. We accomplish this by recording either the value of an **appellation of expression** for the **expression manifested**, or an **appellation of work** for the **work manifested**.

Let's say that our community prefers to reference **expression manifested**, and we are not cataloguing for a linked data environment. Here is a potential pathway for instructions that we would follow in the RDA Toolkit:

1. Start at the element page for **expression manifested**. Scroll to the general *Recording* instruction, which states:

   > "Record this element as a value of Expression: **appellation of expression** or as an IRI." (Citation # 28.55.34.18)

   Ignore the bit about IRI, since we are not cataloguing for a linked data environment. We will focus instead on finding the value of **appellation of expression**. Click on the link for *appellation of expression*.

2. Upon arriving at the **appellation of expression** page, you will see the general *Recording* instruction: “Record this element as a value of Nomen: **nomen string** or as an instance of a **Nomen**” (Citation # 87.65.29.35). Now, you have to decide which *recording method* to apply, based on what your community requires.
    a. If your community requires an *unstructured description* for this element, then the “Recording an unstructured description” instruction tells you to fulfill this by recording a value for **title of expression**. (Citation # 16.28.41.99)
    b. If your community requires a *structured description*, then the “Recording a structured description” instruction tells you to fulfill this by recording a value for **access point for expression**. (Citation # 85.00.19.57)
    c. Similarly, if your community requires an *identifier*, then the “Recording an identifier” instruction tells you to fulfill this by recording a value for **identifier for expression**. (Citation # 16.04.67.88)

For learning purposes, let’s say that our community prefers a *structured description* for referencing the expression that’s manifested in our resource. Thus, we will look at the instructions for recording an **access point for expression** by going to the page for that element.

Read the “Definition and Scope”, then scroll through the page. Look at:

- Prerecording
    - This tells us that an access point for expression can be further categorized into one of these narrower elements: **authorized access point for expression** or **variant access point for expression**. It’s important to know that instructions regarding **access point for expression** are applied “down” to its narrower elements because of this hierarchical relationship.
- Recording
    - Again, we see the boilerplate instruction about recording a value of a nomen string…
- Recording an unstructured description

        - Notice how “This recording method is not applicable to this element” because the very nature of constructing an access point requires *structured* description.
    - Recording a structured description
        - Notice the options presented up front.
        - These are followed by a short table of contents, guiding us through the choice of base of access points for expression, formatting the base of access points, and additional elements and designations that can help distinguish between different access points for expression.

Now, it’s your turn. Take a minute to look through a different **appellation** element page, and find another *Recording* instruction that uses a boilerplate phrase. Once you have found your example, write down the citation number:

ation #

When to go up to a broader element to locate instructions

Workbook page 43

As discussed in the previous section, instructions regarding a broader element are intended to apply also to its narrower elements. So, instructions for **access point for expression** are meant to also apply to **authorized access point for expression** and **variant access point for expression**. However, instructions that apply specifically to *authorized access point for expression* do not necessarily apply to *variant access point for expression* because those two elements are at the same “level” within the element hierarchy.

Here is another example of broader and narrower element relationships that you might need to consider when you are cataloguing:

- **access point for person** – The instructions tell cataloguers what to use as the base of an access point, how to format it, and what else can be added to the base to make the access point unique.
    - **authorized access point for person** – This is a specific subtype of access point for person. The instructions tell cataloguers which access point to *prefer* as an authorized access point for person.
    - **variant access point for person** – This is the other subtype of access point for person. The instructions tell cataloguers how to record access points that are *not* selected for preference.

Question: If a cataloguer wanted to find out whether to include initials in an authorized access point for a person, which element page(s) would they need to look up?

ement(s):

ation number(s):

Application profile: A preview for this afternoon

Workbook page 44

What is an application profile?

Introduction

An application profile is a kind of documentation used with the Official RDA Toolkit. It can be as simple as a list of selected elements, or it can be

designed to show you the different types of guidance needed to record the value of a given element.

Application profiles are created by individual communities, though the minimum description requirements for individual RDA entities can also be considered a basic application profile. The benefit of having an application profile is it helps cataloguers focus their attention on a smaller set of elements than the total number in RDA (over 3000!). For training purposes today, we will refer to the LC/PCC policy statements and an application profile that we have developed just for this workshop. Where helpful, we will supplement these with the LC/PCC Metadata Guidance Documents, which reside outside the RDA Toolkit.

An RDA application profile

According to Guidance: Application profiles, "An application profile specifies the entities, elements, and vocabulary encoding schemes that are expected in a set of metadata that meets the functions and requirements of an application that uses metadata." In other words, a map to guide you through the maze!

Some communities may even choose to develop an enhanced application profile that specifies:

- Entities that must be included, should be included, and must not be included.
- Elements that must be included, should be included, and must not be included
- Repeatability with respect to the elements that connect the resource entities (WEMI entities)
- Recording methods
- Vocabulary encoding schemes
- String encoding schemes

The application profile for this workshop:

The workshop application profile conforms to RDA. We have scoped the application profile to the bibliographic samples selected for this workshop, and we have limited the elements and entities to those used in LC/PCC practice. When possible, we have added links to additional documentation outside the Toolkit. The non-RDA additions to the workshop application profile are:

- LC/PCC core elements and core if/when elements (these are elements that are only core in certain conditions). The core elements form the base of our application profile. They are determined by LC/PCC policy statements.
- Repeatability – is this a repeatable field, based on MARC 21 standards?
- Additional LC/PCC documentation: the LC/PCC policy statements provide more context for exercising cataloguer's judgment and point us to associated Metadata guidance documents when more detailed PCC instructions or examples are available.
- MARC encoding – after we derive a value for our element, the application profile offers potential MARC field and subfield mappings for the RDA value (sometimes filtering lengthy lists of tags found in the Element Reference card to the most commonly encountered tags).

A look at the workshop application profile

Since the official RDA Toolkit is not intended to be used alone, we have designed a workshop application profile from the perspective of an LC-PCC cataloguer. If your institution follows other community policies or practices, you should consult those instead. For today, you will use our application profile as a map that takes you from first looking up your element in the RDA Toolkit, to guidance on the element page and elsewhere in the Toolkit, and finally, to additional guidance and examples that reside outside the Toolkit.

In some cases, our application profile will link you to the string encoding scheme MGD and MARC formatting instructions. String encoding schemes are a method of recording structured description; it provides the syntax for your recorded values (essentially the components that go into your value, the order of the MARC subfields and the punctuation to apply). (We saw examples of string encoding schemes in action earlier today, when we looked at access points for person, and noted the form taken by those access point values.)

Use the application profile as a single starting point where we have our element set, our RDA instructions and LC/PCC policies, and references to external documentation gathered in one place.

Entities: a quick review

On the application profile, the elements are organized by their entity type. Here is a very quick and easy way to identify the different entity types:

- First, the work and expression entities describe content, and the manifestation entity describes carriers. See: Guidance > Content and carriers
- The **Work** entity is the intellectual or artistic creation. The elements of a work do not change regardless of the way its contents are communicated or the way the library resource is published or produced. Otherwise, we would be describing a different work. Example: category of work. A graphic novelization is a new work derived from the original novel.
- The **Expression** entity is the way a work is realized or communicated, without changing the work itself. A single work may be realized by multiple expressions, and the elements of Expression help us to distinguish between different expressions. Example: language. A translation of a novel is a new expression of the original work.
- The **Manifestation** entity is the physical embodiment of content (evidenced by the carrier used for affixing or transmitting the content). Example: publisher or copyright date. A manifestation has statements and identifiers (e.g., ISBN) on it, and physical characteristics.

- For simplicity, we have excluded the **Item** entity from our application profile, but depending on your institution, some elements of Item may be important to include.

Organization of the application profile

Column A: RDA Element and link to Toolkit

In our application profile, we have grouped the elements by their domain entity. Each entity type has its own specific set of elements – some that are attributes, and others that are relationships, such as relationships to associated agents.

- The Manifestation entity comes first.
    - We have elements used to identify a manifestation – Example: Manifestation: title proper.
    - We have the elements used to describe carrier – Example: Manifestation: media type.
    - We have the elements used to record agents associated with the manifestation - Example: Manifestation: contributor person of still image (also known as illustrator).
- The Expression entity is second:
    - We have elements used to identify an expression – Example: Expression: language of expression.
    - We have the elements used to describe content in the context of how it is realized – Example: Expression: content type
    - We have the elements used to record agents associated with the expression – Example: Expression: editor person.
- Last is the Work entity:
    - We have the elements used to identify a distinct work – Example: Work: preferred title of work.
    - We have the elements used to describe content in the context of its existence as a distinct intellectual or artistic creation – Example: Work: category of work
    - We have the elements used to record agents associated with a work - Example: Work: author person.

Column B: Repeatability

Repeatability is not dictated by RDA – except when there is bearing on *cardinality restrictions*. (For instance, a work can be realized by 1 or more expressions, but a single expression can only realize 1 work. An expression can be embodied by 1 or more manifestation, and a manifestation can embody 1 or more expressions. A manifestation can be exemplified by 1 or more items, but an item can only exemplify 1 manifestation.)

Communities set additional repeatability requirements themselves.

- On our application profile, repeatability is determined by the MARC documentation.
- Repeatability tells you whether a field can be repeated in a MARC record, or whether a subfield can be repeated within a field.
- Repeatability is indicated as yes the element is repeatable, or no it isn’t.

Column C: Domain Entity

An element applies to, or identifies, an entity of a specific type - this is the domain of the element. In the Toolkit, elements are categorized by their domain.

Glossary definition for **domain**: "The RDA entity that is described by an element."

- Knowing the domain you want to describe is often the quickest way to browse for an element in the Toolkit, when you don't remember/know the exact element label.

Column D: Range Entity

The range of an element tells you that any possible value for the element identifies an entity of this type.

Glossary definition for **range**: "The RDA entity that is the value of a relationship element."

- Only relationship elements will have a range.
- Example: the element Work: author person has a range entity of Person. That means the value has to be for a person entity (and not e.g. a corporate body entity).
- Knowing the range of an element might help you think through the relationships you are really trying to record.

Column E: Recording Method

The recording method used by an element specifies how its value is to be entered. More details are at Guidance > Recording methods.

- If the value is recorded as an *unstructured description*, it is transcribed from a source of information. – Example: Manifestation: **title proper** is an unstructured description because it is transcribed, typically from from the title page or title screen.

- If the value is recorded as a *structured description*, it is typically a term for a concept taken from a controlled vocabulary. – Example: In our application profile, we ask that you source the value of Person: **authorized access point for person** from the LCNAF if available. Alternatively, a structured description might be constructed based on a string encoding scheme (more on that soon!).
- If the value is recorded as an identifier, it may be a term that is being uniquely identified within a particular system. – Example: ISBN or LCCN are identifiers.
    - An identifier can also be standardized abbreviation. – Example: MARC language or country codes that stand in for the fully spelled out term.
- An element could potentially be recorded using more than one recording method. – Example: Manifestation: **place of publication** can be recorded as an unstructured description in field 264 $b or as an identifier in 008. Hence in our application profile, you will see both recording methods listed.
- A value of an element could potentially form the basis of the value of another element, or be used within a longer value that conforms to a string encoding scheme. – Example: the value for Corporate body: **preferred name of corporate body** can look identical to the value for Corporate body: **authorized access point for corporate body**.

Column F: Source of Vocabulary Encoding Scheme (VES) or String Encoding Scheme (SES)

Vocabulary encoding schemes

A structured description can be recorded using a vocabulary encoding scheme. A value could be taken from an RDA vocabulary encoding scheme or it could be taken from another source outside RDA. See: Guidance > Introduction to RDA > Data values.

Glossary definition for **vocabulary encoding scheme**: “A named structured list of representations of controlled values for elements. A vocabulary

encoding scheme includes an RDA list of terms or their corresponding value vocabularies in the RDA Registry, an ISO code list, a standard terminology, an authority control system, etc. Simple keyword indexes are excluded."

- Some vocabulary encoding schemes are provided as part of the RDA Toolkit. Example: for the content and carrier elements. See Resources > VES Vocabularies
- The LCNAF (Library of Congress Name Authority File) is an example of a non-RDA provided vocabulary encoding scheme.

String encoding schemes

String encoding schemes were formerly called syntaxes. If you have an element that is composed from multiple element values, you need a string encoding scheme to tell you how to combine them. They were included in the original RDA Toolkit. Now, it is up to different communities to specify their own standards.

Glossary definition for **string encoding scheme**: A set of string values and an associated set of rules that describe a mapping between that set of strings and a value of an element.

- In the Toolkit, legacy basic string encoding guidelines are found in the Community Resources area. These are no longer updated in RDA, but can still be consulted for historical purposes. See Resources > Community resources > Legacy RDA community resources > Community refinements
- You can link from the Toolkit to the PCC Metadata Guidance Document for string encoding schemes for each entity. These are intended to replace the basic string encoding scheme guidance in the Toolkit for compliance with LC/PCC standards. Example: PCC: MG: Person: String encoding scheme for access point for person

Column G: Transcription Method

An *unstructured description* is data that is transcribed from a source of information or data recorded in the cataloguer's own words.

- We use normalized transcription guidelines to format the value taken from the source, using punctuation, capitalization etc. See Guidance > Transcription guidelines > Guidelines on normalized transcription
- You might see a value transcribed or recorded depending on the element and recording method specified. – Example: A value for Corporate body: **name of corporate body** is transcribed, but a value for Corporate body: **access point for corporate body** is recorded (either taken from a vocabulary encoding scheme or formatted with a string encoding scheme).

Column H: Additional Comments

Additional comments include:

- Key RDA guidance
- LC-PCC practice
- Links to PCC MGDs applicable to the element.

Column I: Potential MARC fields and subfields

Potential MARC21 fields and subfields can be found in the blue element reference card at the top of each element page.

- Because RDA and MARC were developed at different times, in different contexts, RDA-conformant records will not match perfectly to MARC21 (and vice versa).
- Sometimes a single element can be mapped to more than one MARC field, and a single MARC field can map to more than one RDA element. Some MARC values are made up of more than one

RDA element, while other times, the value of a single RDA element will need to be broken out across several MARC fields or subfields.
- The application profile lists the most relevant MARC fields and subfields for cataloguing a basic monograph.

A look at the RDA Toolkit using the application profile

Now, let's look at how we work with the application profile in conjunction with the RDA Toolkit. Start with the element label in our application profile, beginning with the element Manifestation: **title proper**.

- Find **title proper** in Column A. We have embedded the link to the element page. Click on it. (Note: If you can't get the embedded link to work, you can run a search in the RDA Toolkit > filter the results to "Elements", then find the element page for title proper.)
- In the Toolkit, read the "**Definition and scope**". We learn that
    - (1) a title proper is a title of manifestation that is "selected for preference", and
    - (2) we can treat an alternative title as part of the title proper.
- Click on the blue **Element Reference** box to see the domain and range, confirming that this element is used to describe or identify a distinct manifestation.
    - We also see from the MARC 21 Bibliographic mapping that this element maps only to 245 $a [unstructured description].
- Scroll down to "**Prerecording**". We see that the title proper element does not include parallel other title information or other title information or parallel other title information. Those are treated separately.
    - Look at the right side, with the **"LC-PCC PS" policy statement** set turned on. This is where we see if the element is LC/PCC core.
    - Lengthy policy statements have their own internal scroll bar that you can scroll to see more text.
    - Look here for additional links to associated PCC MGDs.
- **Recording** section: This is where recording instructions appear. Read the general recording instructions, then check your

application profile to see which recording method is required for the element.
    - Our **application profile** tells us to use *unstructured description* for title proper.
    - Look for the "**Recording an unstructured description**" section on the element page:
        - The first option tells us to record a value of Manifestation: **title of manifestation**.
            - The LC-PCC PS annotating the option tells us to "Apply the option".
        - This is an example of an element supertype/subtype hierarchy. Title of manifestation is a broader element of title proper, and includes guidance that applies to both title of manifestation and its narrower elements, title proper and variant title of manifestation.
        - We need to consult the broader element in order to have all the information we need to record the value for the narrower element, title proper (i.e., where we started from!). (Note: See Guidance > Introduction to RDA > Data elements for background.)
- At Manifestation: title of manifestation, we see the LC/PCC practice to record the element with normalized transcription.Transcription guidelines are noted on our application profile, and thankfully, these do not contradict the LC/PCC practice.
- Heading back to Manifestation: **title proper** > **Recording an unstructured description**. We also see a second Option: "Record a Manifestation: note on manifestation on the source or basis for a value of a title proper." Do we need to apply this? The LC/PCC PS tells us: "Apply for online resources, serials, etc."
- Next, we have a list of Conditions and Options for unstructured description.
    - For longer element pages, you get a nice table of contents at the head of the section. If any of the scenarios match the one you are dealing with, jump down to those additional conditions/options.
    - Otherwise, you have finished recording your title proper.

- Tip: Read a condition as though it starts with “IF”, and ensure all statements within the condition box are met, before determining if the condition-option that follows should be applied.

Temperature check

Now that we’re back from our lunch break, we would like to take an informal poll of how you are finding the workshop so far.

Do you have any questions for us at this point?

Link to: Group Notes (OLA SC 2026)

Cataloguing demo, using an application profile

Workbook page 55

Download a copy of the application profile if you haven’t done so yet:
Copy of 2026 OLA Application Profile - Monographs.xlsx

Download a copy of the worksheet: Copy of Exercise worksheet.docx
(Paper copies are appended to your workbook starting at page 75.)

In this segment of the workshop, we will provide a step-by-step demonstration of the cataloguing process, using a straightforward monograph.

Although many of you are likely cataloguing more complex materials, it is important to have a foundation for navigating the RDA Toolkit before moving onto more complicated resources.

Please follow along by recording the same values onto your own copy of the worksheet.

Let's go through this with a real example

We're going to use the RDA Toolkit to find guidance and other documentation. Then, we're going to record values on the worksheet for all the elements we'll need to create a bibliographic record for an information resource called *Screening nature and nation*. Later, we'll learn how to encode these values in MARC.

For this exercise, we ask that you describe the resource as though it were a physical print book, treating the digital copy as a surrogate of the print. **Dimension information: height of physical book is 23 cm.**

Take a moment now to scroll through the digital copy, looking at key parts of the book that will help you with cataloguing it.

Start with the application profile

We'll go back to the application profile and repeat what we did earlier, but looking at each instruction closely to see whether it applies to our example. Once we've figured out the value for title proper, we repeat the process for the rest of the elements we'll need to complete our record. As we go through a few examples for selected elements, we will also learn how to encode their values in MARC.

Recording Manifestation: title proper

- Element: Manifestation: title proper.
- On the **application profile**: this element is used for identifying manifestations.
- **Element reference card:**
    - Domain = Manifestation. When we record this element we describe a manifestation.

    - Range = Nomen. When we record a value for this element, we are recording a value of a nomen string.
    - MARC tags. We only have one mapping: 245 $a [unstructured description].
- Follow the general instruction at **Prerecording:** LC-PCC: "LC/PCC core. In most cases, record the title proper in such a way that definite and indefinite articles at the beginning of the title proper are disregarded for sorting and filing purposes." Following are some exceptions. There are also some MGD links.
    - We will need MG: Manifestation: SES: title proper and statement of responsibility when it comes time to record our full MARC 245 $a $b $c.
- Next, go back to the element and follow the general instruction at **Recording:** "Record this element as a value of Nomen: nomen string or as an instance of a Nomen." Remember that this is a "boilerplate" phrase that basically tells us we are going to record some kind of appellation.
- Next, follow the instruction at **Recording an unstructured description** > Option: "Record a value of Manifestation: title of manifestation."
    - LC/PCC practice: Apply the option. Recall that this is a case where we have to go to a broader element to find instructions for a narrower element.
    - Follow the link to **Manifestation: title of manifestation** > **Recording an unstructured description** > Option: "Use any source of information. Record the form found in the source of information."
    - LC-PCC practice: Do not apply the option. See the options at Guidance: Data provenance: Guidance > Data provenance > Recording a source of metadata that is a manifestation that is being described
    - Follow that link and look down to Condition:
        - "The source of a metadata work is a manifestation that is being described; [and]
        - "A manifestation consists of one or more pages, leaves, sheets, or cards." Condition/Option: "Prefer the

following recording sources in this order," and our first choice is "A title page, title leaf, or title card."
        - Our resource has a title page, so that's what we're going to use.
- Go back to **Manifestation: title of manifestation > Recording an unstructured description** > Option: "Record a title by transcribing text and spoken word content from a manifestation using Guidance: Transcription guidelines, Guidelines on normalized transcription.
    - LC/PCC practice: Apply the option.
    - This is also noted on our application profile.
- Check the remaining conditions on the page to make sure that none of them apply.
- Go back to **Manifestation: title proper > Recording an unstructured description.**
    - Look at the contents list to check that none of the subsequent conditions apply. Then, record the value for Manifestation: title of manifestation **as your title proper**, on your worksheet: **Screening nature and nation**.

Mapping the value to MARC

- Now that we have the value for this element: *Screening nature and nation*, we can go back to the element reference card and our application profile to follow the recommended MARC mapping.
- At the beginning of this walkthrough, we saw that the element reference card mapped the title proper to MARC 21 tag 245 $a.
- When we look at our application profile, find the element > title proper (cell: A7) > scroll to the last column (cell: I7) > we see that title proper has the recommended MARC 21 bibliographic field and subfield tag 245 $a.
- For more information on recording the title proper in MARC (such as what indicator values to record, and what subfield codes to use), consult the MARC 21 Format for Bibliographic Data website: https://www.loc.gov/marc/bibliographic/bd245.html.
- The last step is to take the value and record it in the bibliographic record (see the worksheet provided):

245 1 0 $a Screening nature and nation

Recording Manifestation: place of publication:

- Element: Manifestation: place of publication
- On the application profile: This element is used for identifying manifestations. We see from the application profile this element is associated with more than one recording method. So, we need to follow instructions for recording both an unstructured description, and for recording an identifier.
- **Element reference card:**
    - Domain = Manifestation. When we record this element we describe a manifestation.
    - Range = Place. When we record a value for this element, we record an instance of a place.
    - MARC 21 Bibliographic tags: various tags can be used for unstructured descriptions and identifiers.
- **Prerecording:** This element is a subelement of the superelement Manifestation: publication statement. What this means is that the **publication statement** is composed of the values of its subelements, which includes name of publisher.
    - Notice from the LC-PCC PS that place of publication is marked as LC/PCC core. The same PS also provides an MGD link: MG: Manifestation: Manifestation elements. Let's take a quick look.
    - The same LC-PCC PS also links out to: MG: SES: Publication, Distribution, Manufacturing, and Production, which we will need later.
- **Recording:** "Record this element as a value of Place: appellation of place or as an IRI." (Citation number: 04.16.49.59).
    - The LC-PCC PS tells us "LC/PCC practice: See the metadata guidance documentation: MG: Manifestation: Place of publication." Let's have a look at that MGD.
- We know from our application profile that we need values for two recording methods, an *unstructured description* and an *identifier.*

    - Recording an **unstructured description**: skip down to the second Option: "Record an unstructured description by transcribing text... using... Guidelines on normalized transcription" (Citation number: 70.01.34.21)
        - LC-PCC practice: Apply the option.
    - Keep scrolling down until you see "**Local and larger place names**".
        - We have a local place name and a larger place name, so follow: Condition: "A value of Manifestation: place of publication is a local place name. A name of a larger place appears in conjunction with a local place on a manifestation." > Apply the condition option (Citation number: 80.02.62.65). Record a value of both a local place name and a name of a larger place. LC/PCC practice: Apply the option.
    - Check that none of the subsequent conditions apply.
    - Now we have a value for Manifestation: place of publication recorded as an unstructured description - **Athabasca, AB**.

- From our application profile, we know that this element also needs a value to be recorded as an identifier.
    - Skip down to Recording an **identifier**. Record an identifier for a related place as a value of Place: identifier for place (Citation number: 95.63.90.75).
        - LC-PCC PS calls for use of MARC Code List for Countries (When we look up the MARC code list, Alberta = abc)
    - Now we have a value for Manifestation: place of publication recorded as an identifier: **abc**

Mapping the value to MARC

- Now we have the values for **place of publication**, and we can go back to the element reference card and our application profile to follow the recommended **MARC mapping**.

- At the beginning of this walkthrough, we saw that the element reference card mapped the place of publication to various MARC 21 fields for both unstructured description and identifier. This is a lot of information to process.
    - We have helped you out by narrowing down the possible mappings, and relaying those in the application profile.
    - Our application profile says to use MARC 264 $a for unstructured description, and MARC 008/15-17 for identifier.
    - For more information on encoding the place of publication in MARC, see MG: Manifestation: SES: Distribution, Manufacture, Production, and Publication statements.
    - Definitions for encoding MARC 008 are found at: MARC 21 Format for Bibliographic Data: 008.
- The last step is to take the values and record them in the MARC bibliographic record:

264 _ 1 $a Athabasca, AB 008/15-17 abc

Recording Manifestation: extent of manifestation

- Element: Manifestation: extent of manifestation.
- On the application profile: this element is used for describing carriers. We know that we need values for both a structured description and for an identifier.
- **Definition and scope:** A number and type of unit or subunit of a manifestation.
- **Element reference card:**
    - Domain = Manifestation. When we record this element we describe a manifestation.
    - There is no range entity, which tells us this is an attribute element.
    - MARC 21 Bibliographic tags: various tags can be used for unstructured and structured descriptions.

- **Prerecording:** LC/PCC Core if the manifestation is complete or if the complete extent is known.
- Our **application profile** tells us to record a **structured description**.
- Follow the general "**Recording a structured description**" instruction: "Record a number of units and a term for each kind of unit that comprises a manifestation" (Citation number: 24.77.06.73).
    - See VES: RDA carrier extent unit for structured values.
- Because this element page is very long, skip down to the table of contents (Citation number: 80.62.93.19). Near the bottom we find "Extent of manifestations of text."
    - Follow the general instruction at **Recording a structured description > Extent of manifestations of text > Single unit manifestations > Single volumes with numbered pages, leaves, or columns** > Condition: "A manifestation consists of a single volume." > Condition option: "Record an extent in terms of pages, leaves, or columns according to the type of sequence used in the manifestation" (Citation number: 86.48.56.58).
        - LC/PCC practice: Apply the option.
        - Click on the eye icon to see examples.
    - After the instruction to "Apply the following general guidelines" see Condition: "The volume consists of sequences of leaves and pages, or pages and numbered columns, or leaves and numbered columns." Condition Option: "Record each sequence." We have more than one sequence, so we record them both: **viii, 224 pages**.

Recording Manifestation: illustrative content

- Element: Manifestation: illustrative content
- On the **application profile**: this element is used for describing carriers.

- **Definition and scope:** An indication of the kinds of expression of image content that supplement the main expressions that are embodied by an augmentation aggregate.
- In other words, this element applies to a manifestation that is an aggregate.
- What is an **aggregate**? An aggregate is simply a manifestation that embodies multiple expressions.
    - A publication that embodies a textual work with accompanying illustrations to enhance the textual work would be considered an aggregate, and you could apply the element **illustrative content** in this context.
- **Element reference card:**
    - Domain = Manifestation – when we record this element we describe a manifestation.
    - There is no range entity, which tells us this is an attribute element
    - MARC Bibliographic tags: various tags can be used for unstructured and structured descriptions, and identifiers.
- **Prerecording:** LC core for children's materials.
- We know from the application profile that we need a **structured description.**
- Go to: Recording a **structured description** > Option: Record an appropriate term from the RDA Illustrative Content *vocabulary encoding scheme*.
    - LC/PCC practice: Apply the option.
- See additional options under **Recording.**
    - At Recording, we see that we can use the general term or more specific terms.
    - Follow the instruction at Recording > Option: "Record the general term illustration" and following (Citation number: 63.10.38.98).
    - Follow the Option "Record a term in the singular or plural, as applicable" (Citation number: 25.36.13.82).
    - From the VES, we get the term *illustration*, to use as the value for our structured description, and we use the plural form to enter on the worksheet: **illustrations**.

- From our **application profile**, we know that this element also needs a value that is recorded as an **identifier.**
    - Skip down to Recording an **identifier**. Option: “Record a notation for a term from the RDA *vocabulary encoding scheme*.”(Citation number: 19.04.12.44).
    - For a list of notations, see MARC 21 Format for Bibliographic Data: 008: Books
    - Now we have a value for Manifestation: illustrative content, illustrations, recorded as an identifier: **a**

Recording Manifestation: colour content

- Element: Manifestation: colour content
- On the **application profile**: this element is used for describing carriers. Check for the recording method.
- **Definition and scope:** An indication of the presence of colour or tone embodied by a manifestation.
- **Element reference card:**
    - Domain = Manifestation. When we record this element we describe a manifestation entity.
    - There is no range entity, which tells us this is an attribute element.
    - MARC tags: various tags can be used for unstructured and structured descriptions, and identifiers.
- The **Prerecording** section tells us that this is a shortcut for a chain of elements, and this element does not directly tell us which expression is being manifested.
- Follow the instruction at **Recording an unstructured description** > Option: "Record an uncontrolled term or a term that is transcribed from a source of information" (Citation number: 01.97.91.34):
    - LC practice: Apply the option. If recording colour content, in most cases use a substitute term (e.g., color).
- Apply the option > Option: "Record details or other unstructured information" (Citation number 60.28.47.03).

    - LC practice: Cataloger's judgment. Record a phrase such as "some color" or "chiefly color" as details of colour content in an unstructured description of the textual description.
- For our value, we would record: **colour**

Recording Manifestation: Dimensions

To find instructions on recording a value for the element **dimensions**, you will follow the same process that we've done with the earlier elements:

- Check your application profile: what recording method does it tell us to use?
- Go to the element page. Check the "Definition and scope" to ensure you are at the desired element.
- Review the Element reference card.
- Check for any Prerecording considerations.
- Look for general Recording instructions. If there are none, jump down to the section corresponding to the specific recording method that you are following.
- Scroll through the rest of the page to ensure that you have not missed a relevant condition or option.
- Keep your eyes open for any LC-PCC PS that annotates an instruction that you want to apply.
- The value you should come up with is: **23 cm**

Mapping the values to MARC - MG: Manifestation: SES

- Now that we have the values for the element Manifestation: extent of manifestation, **as well as a few other elements that we have typically recorded alongside the extent of manifestation,** we will consult our application profile again to encode the values in MARC21.
- Find the element extent of manifestation in the application profile > scroll to the last column I > see the recommendation to map the value to 300 $a.
- Record the element value for extent of manifestation:

300 _ _ $a viii, 224 pages

- Next, we will map the MARC field for **illustrative content**. Based on our application profile, we can find illustrative content in cell: A36 > scroll to the last column (column I) > where we can see the recommended MARC21 field is 300 $b and 340 $p. To help finish the 300 MARC we will record illustrations in the 300 $b for now.
- Let's add the subfield $b to our 300 field. To conform with ISBD punctuation, we precede the $b with a space colon space.
- We also need to record our value as an identifier. The application profile tells us to record illustrative content in MARC 008/18-21.

300 $a viii, 224 pages : $b illustrations

008/18-21 a

- Following the same steps as before, can you walk us through how to record the value for color content?

300 $a viii, 224 pages : $b illustrations, _____ ;

- There is one last RDA element that needs to be recorded in the MARC 300 field, $c. For the purpose of this training, we have provided the dimensions. To conform with ISBD punctuation, precede the $c with space semicolon space.

300 $a viii, 224 pages : $b illustrations, color ; $c 23 cm

Recording Expression: content type

- Element: Expression: content type.
- On the **application profile**: this element is used for describing the content of an expression entity. Our application profile tells us to record a **structured description.**
- **Definition and scope:** “A categorization that reflects the fundamental form of communication in which the content is expressed and the human sense through which it is intended to be perceived.”
- **Element reference card:**
    - Domain = Expression. When we record this element we describe an expression entity.
    - There is no range entity, which tells us this is an attribute element.
    - MARC tags: various tags can be used for unstructured and structured descriptions, and for identifiers.
- **Prerecording** tells us that this element is LC/PCC Core, and gives us a link to MG: Expressions.
- At **Recording**, we see the general condition: An expression has two or more values of Expression: content type.
    - It is cataloguer’s judgement whether to record all content types, just the predominant content type, or only the content types that apply to the most substantial content of the expression.
    - There is PCC guidance at: MG: expression (scroll to page 10).
- **Recording a structured description:** Follow the instruction at Option: “Record an appropriate term from the RDA Content Type vocabulary encoding scheme” (Citation number: 40.36.06.88).
    - Common terms are *text* (for print or online text-based resources); *spoken word* (audio or streaming audio); and *still image* (when we have illustrations).
    - In our case, we want the term “text”.

- **Recording an identifier:** This is for PCC members who are required to record the MARC identifier for content type and the source of the identifier
    - Apply Option: "Record an identifier or notation for a term from another appropriate vocabulary encoding scheme" (Citation number: 48.68.50.25).
        - LC-PCC PS "LC/PCC practice: Cataloger's judgment. If recording an identifier, use the code from the Term and Code List from the RDA Content Types Scheme or its equivalent at id.loc.gov"
        - The identifier used for *text* in is **txt.**
    - Also apply Option: "Record a vocabulary encoding scheme that is used as a source of information for an identifier" (Citation number: 85.26.63.29).
        - PCC members must record **data provenance** for this element. At Term and Code List for RDA Content Types we find the note: “The source code for this list in field 336 $2 (Source) is **rdacontent**.”

In your worksheet, in the first table, you will have recorded:

content type = text
content type = txt

In your worksheet, in the second table, you will transform your RDA values into MARC, like so:

336 _ _ $a text $b txt $2 rdacontent

Recording Work: author person

- Element: Work: author person.
- On the **application profile**: this element is used for describing an agent responsible for creating a Work entity. Our application profile tells us to record a **structured description.**
- **Definition and scope:** “A person who is responsible for creating a textual work. Creation of a new work by paraphrasing, rewriting, or adapting works by another creator, if the modification has substantially changed the nature and content of the original or changed the medium of expression, is included.”
- **Element reference card:**
  - Domain = Work. When we record this element we describe an expression entity.
  - Range = Person. When we record a value for this element, we record an instance of a person.
  - MARC tags: various tags can be used to record the value. All four recording methods can be applied for this element.
- **Prerecording**: LC/PCC policy statement: “LC/PCC Core if the element is used to record an agent that is a creator of work. See Work: creator agent of work for additional guidance.” This is another case where we need to go to a broader element for complete guidance. We have to make sure that the element we have chosen for recording our author data is the appropriate one. We need to check the broader element and make sure our author data meets its definition.

    - Go to Work: creator agent of work and look at the **LC/PCC policy statement**: “LC/PCC Core for an agent that has principal responsibility for a work and is named first in manifestations embodying the work or in reference sources. If principal responsibility is not indicated, only the first-named agent is required. Additional agents may be recorded according to cataloger's judgment.”
    - We can infer that the agent responsible for creating our resource meets the definition for Work: creator of work.
    - Work: author person is a subtype of Work: creator agent of work – recall that all guidance that applies to a broader element also applies to its narrower elements. Now we can be certain that it is appropriate to record our author data using Work: author person.
- Go back to Work: author person. Follow the general instruction at **Recording**: “Record this element as a value of Person: appellation of person or as an IRI.” (Citation number: 35.35.14.50).
    - At Person: appellation of person, we are reminded at **Recording a structured description** that structured description for this appellation takes the form of an **access point for person**. Click the link for Person: access point for person.
        - At Person: access point for person scroll to **Recording a structured description** > first Option: “Use a *vocabulary encoding scheme* as a *source of information*. Record the form found in the vocabulary encoding scheme. Do not amend the values or punctuation.” (Citation number: 61.33.55.87).
            - LC/PCC practice: “Apply the option. Follow instructions at Person: authorized access point for person, or Person: variant access point for person.” What the LC/PCC PS does not explicitly tell us is whether we want an authorized access point or a variant access point at this point. But, we can safely say from the RDA definitions of “authorized” versus “variant access point for person” that “authorized” is always the access

point “selected for preference”, and in our case, we just need the preferred access point, thus, we will click the link for authorized access point.

- At Person: authorized access point for person: go to **Recording a structured description** > first Option: “Record a value that is selected within a *vocabulary encoding scheme* as an authorized form of Person: access point for person” (Citation number: 07.72.67.80).
    - LC/PCC policy statement: LC/PCC practice: “If an authorized form has been established in the LC/NACO Name Authority File, apply the option by recording that authorized form.”
    - The LCNAF has a record for our author’s name, so let’s record it on our worksheet.

Mapping RDA data to MARC 21

Workbook page 70

Please take a few minutes now to continue mapping your RDA data to MARC, using the worksheet provided.

Solution to the MARC mapping exercise

Workbook page 70

Follow this link to open the Google Sheet with the solutions to this cataloguing exercise:

RDA values: Copy of Exercise 1 - Solution, RDA.xlsx
MARC values: Copy of Exercise 1 - Solution, MARC record.docx

In our answer key, we have provided step-by-step explanations of how we arrived at certain RDA values. We recognize that for some values, you may be required to navigate through multiple element pages and read through

multiple options and policy statements before arriving at a value for your original starting element. For initial learning, it is useful to break down these steps, but we can assure you that through repetition, this navigation process will become second nature. You might even find that you no longer need to consult the RDA Toolkit for frequently recurring situations.

Work time: A complete catalogue record

Workbook page 71

Take a moment now to examine our next bibliographic sample.

Click to download PDF:
https://ruor.uottawa.ca/bitstreams/c06a6852-e316-44fe-bccb-0aef8312d2e2/download

Catalogue this sample as though it were a physical print book. Assume the dimension of the book is 23 cm. Consult our application profile, and record your data in the blank Exercise worksheet.

Download another copy of the worksheet:
Copy of Exercise worksheet.docx

Solution to the catalogue record exercise

Workbook page 71

Follow this link to open the Google Sheet with the solution to this cataloguing exercise:

- RDA values: Copy of Final - Exercise 2- Solution - OLA - 2026
- MARC values: Copy of Exercise 2 - Solution, MARC record

Closing remarks

Workbook page 72

Great job today, we truly value your work and participation during this workshop! In this workshop you:

- ☐ Learned how to search for, locate and cite RDA instructions in the Official Toolkit
- ☐ Learned about the different recording methods and how to use them
- ☐ Learned how to find policy statements and metadata guidance documents
- ☐ Learned that element pages are all organized the same way
- ☐ Saw examples of options and condition options
- ☐ Broke down the cataloguing workflow by consulting an application profile and using it to help you map RDA data into a MARC21 record.

As we bring this workshop to a close, we would like to thank you for your participation. We'd also like to thank OLA, the E.J. Pratt Library staff, Beth Shoemaker, and everyone who has helped with the organization of this workshop.

With the phasing out of the Original RDA Toolkit in May 2027 and the need to support linked data in the future, it's important for the cataloguing community to be persistent and continue preparing for the transition to the Official RDA Toolkit.

We will be sending out a post-workshop survey to collect your feedback on your experience today. The information that you share with us will help our working group refine our training materials, which we plan to share more broadly in the future.

Last but not least, if you are joining us for the post-workshop social, we will meet at the Duke of Cornwall at 6pm.

About today’s workshop team

Thomas Brenndorfer is a Librarian at the Guelph Public Library. He is Co-Chair of NARDAC (North American RDA Committee), Chair of the Canadian Committee on Cataloguing, and author of *RDA Essentials*, first edition. In 2023, Thomas was the recipient of the OLA Technical Services Award.

Susie Jones is a librarian at the Vancouver Public Library. She is a member of the PCC (Program for Cooperative Cataloguing) Communications Committee.

Elisa Sze is a Metadata Librarian at the University of Toronto Libraries, and a sessional cataloguing instructor at the University of Toronto Faculty of Information. She serves on the RDA Steering Committee as Education and Orientation Officer.

Ellen Wright is a Cataloguing Librarian at Concordia University in Montréal, Québec. She catalogues a wide range of media formats, including print, audiovisual, and digital materials.

May Chan is Head of Metadata Services at University of Toronto Libraries. She has been involved in creating, delivering and supporting Official RDA training in various roles and contexts such as the Faculty of Information, Ontario Library Association, American Library Association, and the Program for Cooperative Cataloging.

Additional Resources

- RDA Toolkit Feedback

- PCC Minimum Viable MARC Bibliographic Records.pdf
  - developed by the Advisory Committee for Library Systems and Vendors

- PCC Working Group on Metadata Application Profiles
  - Draft BSR for Official RDA--2025 draft (Bibliographic Standard Record)

- Music Library Association Best Practices