Checklist: Creating RDA records

[based in part on LC's decisions on additional core elements for the US RDA Test and
what generally is included in bibliographic records in U.S. libraries--
decide what are additional core elements in your library]

Getting started

A. What is the mode of issuance of your resource: a single part monograph, a multipart
monograph, an integrating resource, or a serial? (If you're not sure, see the definitions at
RDA 2.13 and check LC policies for some specific categories in LCPS 0.0.)

B. If your resource is a multipart monograph, an integrating resource, or a serial and
there is already a bibliographic record for it in the database, consult RDA 1.6 to
determine if you should create a new description or add information to the existing
record. If a new description is not needed, follow the instructions in RDA about changes
related to the element that has changed (e.g., RDA 2.3.2.12 for changes in title proper,
RDA 2.4.1.10 for changes in statement of responsibility).

C. If you are not updating an existing record, create a new description. Depending on
the mode of issuance, the only/main content, and the only/main carrier of your resource,
select the appropriate template/work form.

D. Decide if you are making a comprehensive description (RDA 2.1.2) or an analytical
description (RDA 2.1.3) and determine the basis of your description based on which
description you will be making.

E. Determine your preferred source of information based on the type of resource:
- resources consisting of one or more pages, leaves, sheets, or cards (or images of
  one or more pages, leaves, sheets, or cards) (RDA 2.2.2.2);
- resources consisting of moving images (RDA 2.2.2.3);
- other resources (RDA 2.2.2.4).

F. If there is more than one source that could be the preferred source, consult the
appropriate instruction:
- different languages or scripts (RDA 2.2.3.1);
- different dates (RDA 2.2.3.2);
- reproduction vs. original (RDA 2.2.3.3).

MARC fields other than 100-130, 240, 700-730, 760-787

G. The elements in this section are your library's core elements if applicable and if
available -- add or subtract from those given here. Decide your policy on amount of
research beyond the resource being cataloged.

H. If there is a "(T)" after the element name, it is a transcribed element. Generally, transcribe what is on the resource (RDA 1.7). There are two possible actions for capitalization:
- Transcribe exactly what is on the resource (or retain what is supplied from a digital source) or
- Adjust the capitalization according to RDA appendix A.

I. If there is not a "(T) after the element name, it is a recorded element. Sometimes the information recorded is based on what is found on the resource; sometimes the information is supplied by the cataloger. See RDA appendix B for the use of abbreviations in these elements.

J. Follow your current policy on giving found scripts and/or romanized forms.

K. Supply ISBD punctuation between elements and between areas. Consult RDA appendix D (can also consult LCPS 1.7.1).

L. Elements in bibliographic record

1. Identifier for the manifestation -- MARC 020, 022, 024, 027, 028, 030, 074, 086 (RDA 2.15)

2. Title proper (T) -- MARC 245 (RDA 2.3.2; can also see LCPS information)
3. Parallel title proper (T) -- MARC 245 (RDA 2.3.3)
4. Other title information (T) -- MARC 245 (RDA 2.3.4)
5. Statement of responsibility relating to title proper (T) -- MARC 245 (RDA 2.4.2; can also see LCPS information)
    a. Only the first recorded is required. Also see RDA 2.4.2.3 about preferring a statement identifying creator(s) of intellectual or artistic content.

6. Designation of edition (T) -- MARC 250 (RDA 2.5.2; can also see LCPS information)
7. Designation of a named revision of an edition (T) -- MARC 250 (RDA 2.5.6)

8. Production statement: Date of production -- MARC 260 $c (RDA 2.7.6; can also see LCPS information)
    a. This element applies only to a resource in unpublished form. Remember that resources on the Web are considered to be published.

9. Publication statement:
    a. Place of publication (T) -- MARC 260 $a (RDA 2.8.2; can also see LCPS information)
        i. Only the first recorded is required.

        ii. LC advice: If the information is not on the resource, supply a probable
           place (RDA 2.8.2.6) rather than giving a place of distribution or a place
           of manufacture.
   b. Publisher's name (T) -- MARC 260 $b (RDA 2.8.4; also see LCPS
     information)
        i. Only the first recorded is required.
        ii. LC advice: If the information is not on the resource, give "[publisher
          not identified]" and give the name of distributor (RDA 2.9.4) or name
          of manufacturer (RDA 2.10.4) in that order.
   c. Date of publication -- MARC 260 $c (RDA 2.8.6; also see LCPS information)
        i. LC advice: If the information is not on the resource, supply a probable
          date (RDA 1.9) rather than give a date of publication or a date of
          manufacture (RDA 2.10.6) in that order.

10. Copyright date -- MARC 260 $c (RDA 2.11)
   a. Only required if date of publication and date of distribution are not identified.

11. Extent -- MARC 300 $a (RDA 3.4; can also see LCPS information)
   a. Give only if the resource is complete or the full extent is known.

12. Illustrative content -- MARC 300 $b (RDA 7.15)

13. Dimensions -- MARC 300 $c (RDA 3.5)

14. Content type -- MARC 336 (RDA 6.9)

15. Media type -- MARC 337 (RDA 3.2)

16. Carrier type -- MARC 338 (RDA 3.3)

17. Series statement:
   a. Title proper of series (T) and Title proper of subseries (T) -- MARC 490 $a
     (RDA 2.12.2 and RDA 2.12.10; can also see LCPS information)
   b. ISSN of series and ISSN of subseries -- MARC 490 $x (RDA 2.12.8 and
     2.12.16; can also see LCPS information)
   c. Numbering within series (T) and Numbering within subseries (T) -- MARC
     490 $v (RDA 2.12.9 and 2.12.17; can also see LCPS information)

18. Uniform Resource Locator -- MARC 856 $u (RDA 4.6; can also see LCPS
information)

19. Language of the content -- MARC 041, 546 (RDA 7.12; can also see LCPS
information)
20. Script -- MARC 546 (RDA 7.13.2; can also see LCPS information)

21. Note on source of title -- MARC 500 (RDA 2.20.2; can also see LCPS information)

22. Variant titles -- MARC 246 (RDA 2.3.6)

23. If the resource is intended for children:
    a. Intended audience -- MARC 008/22 as applicable, MARC 521 (RDA 7.7)
    b. Summarization of the content -- MARC 520, 856 (RDA 7.10)

24. If the resource is a monograph with indexes and/or bibliographies:
    a. Supplementary content -- MARC 504 (RDA 7.16; can also see LCPS information)

25. If the resource is a sound resource (some of MARC coding also in 007/008):
    a. Type of recording -- MARC 300 $b (RDA 3.16.2.3)
    b. Recording medium -- MARC 300 $b (RDA 3.16.3.3)
    c. Playing speed -- MARC 300 $b (RDA 3.16.4.3)
    d. Groove characteristic -- MARC 300 $b (RDA 3.16.5.3)
    e. Track configuration -- MARC 300 $b (RDA 3.16.6.3)
    f. Tape configuration -- MARC 300 $b (RDA 3.16.7.3)
    g. Configuration of playback channels -- MARC 300 $b (RDA 3.16.8.3)
    h. Special playback characteristics -- MARC 300 $b, 538 (RDA 3.16.9.3

26. If the resource is a motion picture film:
    a. Presentation format -- MARC 300 $b (RDA 3.17.2)
    b. Projection speed -- MARC 300 $b, 340 (RDA 3.17.3)

27. If the resource is a videorecording:
    a. Video format -- MARC 300 $a (RDA 3.18.2)
    b. Broadcast standard -- MARC 300 $a (RDA 3.18.3)

28. If the resource is an electronic resource:
    a. File type -- MARC 256, 516 (RDA 3.19.2)
    b. Encoding format -- MARC 300 $b, 352, 538 (RDA 3.19.3)
    c. File size -- MARC 256, 300 $a (RDA 3.19.4)
    d. Resolution -- MARC 538 (RDA 3.19.5)
    e. Regional encoding -- MARC 538 (RDA 3.19.6)
    f. Transmission speed -- MARC 538 (RDA 3.19.7)
    g. Date resource viewed -- MARC 588 (RDA 2.20.1.13)
    h. Equipment or system requirement -- MARC 538 (RDA 3.20)

29. If the resource is a cartographic resource:
    a. Layout -- MARC 300 (RDA 3.11)
    b. Digital file characteristics -- MARC 352 (RDA 3.19)
    c. Longitude and latitude -- MARC 255 (RDA 7.4.2; can also see LCPS information)
    d. Horizontal scale of cartographic content -- MARC 255 (RDA 7.25.3; can also see LCPS information)

e. Vertical scale of cartographic content -- MARC 255 (RDA 7.25.4; can also see LCPS information)
f. Additional scale information -- MARC 255 (RDA 7.25.5)
g. Projection of cartographic content -- MARC 255 (RDA 7.26; can also see LCPS information)

30. If the resource is a music resource:
   a. Form of musical notation -- MARC 500 (RDA 7.13.3)
   b. Format of notated music -- MARC 300 $a (RDA 7.20)
   c. Medium of performance of musical content -- MARC 500 (RDA 7.21)
   d. Duration -- MARC 300 $a (RDA 7.22)

31. If the resource is a serial:
   a. Numbering of serials' elements (T) -- MARC 362 (RDA 2.6; can also see LCPS information)
      i. Numeric/alphabetic ... chronological designation of first issue/part of the first or only sequence
      ii. Numeric/alphabetic ... chronological designation of last issue/part of the first or only sequence
   b. Place of publication -- MARC 260 $a (RDA 2.8.2; can also see LCPS information). Also give current place of publication if it differs from first.
   c. Publisher's name (T) -- MARC 260 $b (RDA 2.8.4; can also see LCPS information). Also give current publisher's name if it differs from first.
   d. Extent -- MARC 300 $a (RDA 3.2; can also see LCPS information).
   e. Dimensions -- MARC 300 $c (RDA 3.5; can also see LCPS information).
   f. Frequency -- MARC 310, 321 (RDA 2.14)
   g. Note on issue or part used as the basis for identification -- MARC 588 (RDA 2.20.13)
   h. Note on change in carrier characteristics -- MARC 500 (RDA 3.22.6; can also see LCPS information)
   i. Later title proper (T) -- MARC 246 (RDA 2.3.8)

32. If the resource is a multipart monograph:
   a. Later title proper (T) -- MARC 246 (RDA 2.3.8)
   b. Place of publication -- MARC 260 $a (RDA 2.8.2; can also see LCPS information). Also give current place of publication if it differs from first.
   c. Publisher's name (T) -- MARC 260 $b (RDA 2.8.4; can also see LCPS information). Also give current publisher's name if it differs from first.
   d. Note on issue or part used as the basis for identification -- MARC 588 (RDA 2.20.13)
   e. Note on change in carrier characteristics -- MARC 500 (RDA 3.22.6; can also see LCPS information)

33. If the resource is an integrating resource (updating loose-leaf or web site):
   a. Earlier title proper (T) -- MARC 247 (RDA 2.3.7; also see LCPS information)

b. Note on iteration used as the basis for identification -- MARC 588 (RDA 2.20.13)

34. Cataloger's judgment on the inclusion of other RDA elements in the bibliographic record.

MARC fields 100-130, 240, 700-730, 760-787

M. Follow guidelines for capitalization, etc., in RDA 6.2.1 and in RDA 8.5.

N. Follow guidelines in RDA appendix E and LCPS 1.7.1 for punctuation, etc., of authorized access points.

O. Elements in authorized access point to identify the work or expression (AACR2 main entry)

35. Authorized access point for a work (6.27.1)
    a. Preferred title -- MARC 130, 245, 100-111 $t (RDA 6.2)
        i. Compilations (RDA 6.2.2)
    b. Creator -- MARC 100-111 (RDA 19.2)
        i. Single creator vs. multiple creators (principal responsibility or not)
        ii. If creator is a person, see P. below.
        iii. If creator is a family, see Q. below.
        iv. If creator is a corporate body (including jurisdiction), see R. below.
    c. Other person, family, body associated with a work -- MARC 100-111 (RDA 19.3)
        i. Only if used when creating the authorized access point for the work (RDA 6.27-6.31)
    d. Other elements for works if need to break a conflict:
        i. Form of work -- MARC: added to preferred title (RDA 6.3)
        ii. Date of work -- MARC: added to preferred title (RDA 6.4)
        iii. Place of origin of the work -- MARC: added to preferred title (RDA 6.5)
        iv. Other distinguishing characteristic of the work (RDA 6.6)

36. If the resource is a musical work:
    a. Preferred title -- MARC 130, 245, 100-111 $t (RDA 6.2, RDA 6.14.2)
    b. Medium of performance -- MARC: $m in authorized access point (RDA 6.15)
    c. Numeric designation of a musical work -- MARC: $n in authorized access point (RDA 6.16)
    d. Key -- MARC: $r in authorized access point (RDA 6.17)

37. If the resource is a legal work:
    a. Preferred title -- MARC 130, 245, 100-111 $t (RDA 6.2, RDA 6.19.2)

38. If the resource is a religious work:
   a. Preferred title -- MARC 130, 245, 100-111 $t (RDA 6.2, RDA 6.23.2)

39. Authorized access point for an expression (RDA 6.27.3) = authorized access point for the work plus one or more addition:
   a. Content type -- MARC: $h in authorized access point (RDA 6.9)
   b. Date of expression -- MARC: $f in authorized access point (RDA 6.10)
   c. Language of expression -- MARC: $l in authorized access point (RDA 6.11)
   d. Other distinguishing characteristic for the expression -- MARC: various subfields (RDA 6.12)

P. Elements in authorized access point to identify a person
   a. Additional creators in MARC 700 (RDA 19.2)
   b. Other persons associated with the work (honourees, directors, performers, etc.) (RDA 19.3)
   c. Contributors in MARC 700 (translators, editors, etc.) (RDA 20.2)

40. Authorized access point for a person (RDA 9.19)
   a. Preferred name (base of the access point) -- MARC 100 or 700 (RDA 9.2.2)
   b. Date associated with the person
      i. Date of birth -- MARC 100 $d or 700 $d (RDA 9.3.2)
      ii. Date of death -- MARC 100 $d or 700 $d (RDA 9.3.3)
      iii. Period of activity of the person -- MARC 100 $d or 100 $d (RDA 9.3.4)
   c. Add information as needed for type of name or to break a conflict:
      i. Title of the person -- MARC 100 $c or 700 $c (RDA 9.4)
      ii. Other designation associated with the person -- MARC 100 $c or 700 $c (RDA 9.6)
      iii. Field of activity of the person -- MARC 100 $c or 700 $c (RDA 9.15)
      iv. Profession or occupation -- MARC 100 $c or 700 $c (RDA 9.16)
      v. Fuller form of name -- MARC 100 $q or 700 $q (RDA 9.5)

Q. Elements in authorized access point to identify a family

41. Authorized access point for a family (RDA 10.10)
   a. Preferred name (base of the access point) -- MARC 100 3# or 700 3# (RDA 10.2.2)
   b. Type of family -- MARC: added to the preferred name (RDA 10.3)
   c. Date associated with the family -- MARC 100 $d or 700 $d (RDA 10.4)
   d. Place associated with the family -- MARC 100 $c or 700 $c (RDA 10.5)
   e. Prominent member of the family -- MARC 100 $g or 700 $g (RDA 10.6)

R. Elements in authorized access point to identify a corporate body

42. Authorized access point for a corporate body (RDA 11.13)

    a. Preferred name (base of the access point) -- MARC 110/111 or 710/711 (RDA 11.2.2)
        i. Includes preferred name for the place (RDA 16.2.2) if giving an access point for a jurisdiction
    b. If the corporate body is not a conference, add information as needed to break a conflict:
        i. Other designation associated with the corporate body -- MARC: added to the preferred name (RDA 11.7)
        ii. Location of headquarters -- MARC: added to the preferred name (RDA 11.3.3)
        iii. Date of establishment -- MARC: added to the preferred name (RDA 11.4.3)
        iv. Date of termination -- MARC: added to the preferred name (RDA 11.4.4)
        v. Associated institution -- MARC: added to the preferred name (RDA 11.5)

43. If the corporate body is a conference, exhibition, etc.
    a. Other designation associated with the corporate body -- MARC: added to the preferred name (RDA 11.7)
    b. Number of a conference, etc. -- MARC 110/111 $n or 710/711 $n (RDA 11.6)
    c. Location of conference, etc. -- MARC 110/111 $c or 710/711 $c (RDA 11.3.2); if Associated institution used in lieu of location -- MARC 110/111 $c or 710/711 $c (RDA 11.5)
    d. Date of a conference, etc. -- MARC 110/111 $d or 710/711 $d (RDA 11.4.2)

S. Relationships other than those named above: which relationships to give in each category to be determined by library

44. Related work -- MARC 505, 7XX (RDA 25.1)

45. Related expression -- MARC 505, 7XX (RDA 26.1)

46. Related manifestation -- MARC 500, 760-787 (RDA 27.1)

47. Related item -- MARC 500, 760-787 (RDA 28.1)