Learn about RDA implementation in Amlib.

Overview

In January 2012 the Library of Congress announced it would implement RDA (Resource Description and Access) around March 2013.

This would be a transition from AACR2 (Anglo-American Cataloguing Rules, second edition). These rules were created based on what was required within Card Catalogues. Since Automation, the widespread use of keyword searching and the huge range of formats available for libraries in the present day, a change was needed. A revision was started but soon it was realized that a total overhaul was necessary.

Unknown to the library world previously, an item now needs no real physical presence – it could be merely a link to a computer file. A new standard was required to adequately describe and access resources within a digital world.

The same Catalogue record can be represented in a variety of formats:

- Print
- Digital
- Audio
- Large print
- Braille
- Website
- PDF document

The design implications allow clusters of formats under the one Title rather than many, separate records for the same Title based on formats (for example – a different record for each ISBN). This embraces the modern approach to discovery layers and cloud computing. Hopefully this brings with it better ways to describe the previously known “GMD”s

Changes to make description and access more attainable with a focus on helping users more effectively and included:

- no more Latin abbreviations
- fewer abbreviations
- allowance for local cataloguing standards to meet the needs of the community
- specific format descriptors for non-book and electronic resources record information as it is presented on the item
- note all authors and contributors.

As well as these changes, an implementation will be developed called FRBR - Functional Requirements for Bibliographic Records. In our OCLC Worldcat and Worldcat Local Search windows, it has been possible to combine
manifestations of a representative work together, so that a user does not need
to scroll through 50 versions of “Shades of Grey” titles (for example), in order to get to the next truly discrete item in the
list which may be an article about that title. Clicking on the “editions and formats” link will allow the user to see related
versions of that item, and the list of “FRBRised” items can be sorted by date (newest), which is the default, or by date
(oldest) or by library holdings.

We are working on a new NetOPAC for Version 6 which should better embrace the discovery layers and expectations of
the User.

The main theory behind FRBR is to make the user’s following tasks much easier:

• Find
• Identify
• Select
• Obtain

As well as this, Functional Requirements for Authority Data (FRAD) focuses on assistance for the user to:

• Find
• Identify
• Contextualise
• Justify

This all means a new set of terminology and mindsets.

Amlib is very flexible with its allowance to add new Authority Marc Tags and the ability to display these within Catalogue
records and Stockitems. It is also easy to ensure they can be seen by the Public in the NetOPACs and Opac windows.

There should be minimal effects on the Cataloguer within Amlib. Changes in Amlib should be minimal but will include:

• New Marc Tags (for example MARC field 264 which will replace field 260 in RDA records) as
well as 33x Marc Tags
  • Change to Worksheet and Cataloguing Worksheet Templates (Lead Thru Sets)
  • Change to Stockitem Form Display Tags
  • Change to NetOPAC Display Tags

**Changes to within Amlib add new MARC tags**

Follow these steps to add new Authority Tags and Subfields.

Only those Tags defined on the system will be available for data coming from the import. Therefore, to get the new RDA
Tags that will be included in Import files it is necessary to add them into Amlib. For example: if a Tag: 264 is imported via
SCIS, SL of WA or Libraries Australia, this Tag will only go into Amlib if the Tag is defined.
Add a 264 Tag:

Information in the Tag 264 is similar to information in Tag 260 (Publication, Distribution, etc. (Imprint)) and can be set up in the same way that your Tag 260 is set up already, so you may like to F2 Insert it next to the Tag 260 so you can copy the same parameters on the main marc tags screen.

**Note:** Use the Library of Congress information as a Guide and source of information about the Tag and Subfields: [http://www.loc.gov/marc/bibliographic/bd264.html](http://www.loc.gov/marc/bibliographic/bd264.html). All tag and subfield descriptions below come from this page.

1. In Amlib go to **Main > Authorities > MarcTags** – the Marc Tags Within the System screen will display
2. Highlight the 260 Tag
3. Click **F2 Insert** button – a new entry will appear in the table above the 260 Tag

![Image of Marc Tag Table]

4. Type in the Tag details as below. Tag No, Tag Description, etc. Generally the entries will be similar to the 260 tag

<table>
<thead>
<tr>
<th>Tag No</th>
<th>Tag Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>264</td>
<td>Production, Publication, Distribution, Manufacture, and Copyright Notice</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/Amlib/Authorities/RDA_Implementation

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5. Click the **F3 Update** button

6. Select the new Tag line and click the **F7 SubF** button – the Tag Subfields screen will display

7. Click **F1 New** to set up the a, b and c subfields as required – fill in the table as appropriate

![Tag Subfields](Image)

Note all subfields will follow the same format:
- Can be Repeated **Y**
- Authority **N**
- Used in Search Key **N**
- Used in Marc Display **Y**
- Create Keywords **N**
- **Seq number** ascending in increments of 10 as per screen shot

8. Fill in the table as appropriate

9. Click the **F3 Update** button when complete

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https://help.oclc.org/Library_Management/Amlib/Authorities/RDA_Implementation

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Add a 336 Tag

The 336 tag is the form of communication through which a work is expressed, for example Performed Music.


1. Go to Main > Authorities > MarcTags – the Marc Tags Within the System screen will display
2. Click F1 New button – a new entry will appear in the table below the other Tags

3. Type in the Tag details: Tag No, Tag Description, etc.
   - Tag No **336**
   - Tag Description **Content Type**
   - Default Ind 1 leave blank
   - Default Ind 2 leave blank
   - Can the tag be repeated **Y**
   - Is the tag an Authority **N**
   - Keyword Search Code leave blank
   - Default Catalogue Show Seq **33600**
   - Allow Tag XRefs **336**

4. Click the F3 Update button
5. Select the new Tag line and click the **F7 SubF** button – the Tag Subfields screen will display.

6. Select **F1 New** and set up the **a** and **b** subfields as required – fill in the table as appropriate.

![Tag Subfields Screen](image.png)

Note all subfields will follow the same format:

1. Can be Repeated **Y**
2. Authority **N**
3. Used in Search Key **N**
4. Used in Marc Display **Y**
5. Create Keywords **N**
6. Seq number ascending in breaks of 10 as per screen shot

7. Click the **F3 Update** button when complete.

### Add a 337 Tag

Media type reflects the general type of device required to view, play, run, etc., the content of a resource, for example, Video.

**Note:** Use the *Library of Congress* information as a Guide and source of information about the Tag and Subfields: [http://www.loc.gov/marc/bibliographic/bd337.html](http://www.loc.gov/marc/bibliographic/bd337.html). Use the same settings in Amlib for the rest of the Marc tags as for the 336 tag above- all tags will follow the same rules in the marc tag setup.

1. Go to **Main > Authorities > MarcTags** – the Marc Tags Within the System screen will display.
2. Click **F1 New** button – a new entry will appear in the table below the other Tags.
3. Type in the Tag details: Tag No, Tag Description, etc. for the 337 Tag (Media Type). Follow the same settings as for the 336 tag – page 7.
4. Click the **F3 Update** button.
5. Select the new Tag line and click the **F7 SubF** button – the Tag Subfields screen will display.
6. Set up the **a** and **b** subfields as required- follow the same format as for the 336 tag:
   - "**a**" Subfield – Media Type Item
   - "**b**" Subfield – Media Type Code
7. Click the **F3 Update** button when complete

### Add a Tag 338

Carrier type reflects the format of the storage medium and housing of a carrier in combination with the media. Multiple media types, for example, Video disc.


1. Go to **Main > Authorities > MarcTags** – the Marc Tags Within the System screen will display
2. Click **F1 New** button – a new entry will appear in the table below the other Tags
3. Type in the Tag details: Tag No, Tag Description, etc. for the 338 Tag (Carrier Type). Follow the same settings as for the 336 tag – page 7
4. Click the **F3 Update** button
5. Select the new Tag line and click the **F7 SubF** button – the Tag Subfields screen will display
6. Click **F1 New** to set up the a and b subfields as required – follow the same format as for the 336 tag
   - “a” Subfield – Carrier Type Item
   - “b” Subfield – Carrier Type Code
7. Click the **F3 Update** button when complete

### Other Tags to be considered include:

- **Tag 344**: Sound characteristics
  

- **Tag 345**: Projection characteristics
  

- **Tag 346**: Video characteristics
  

- **Tag 347**: Digital characteristics
  
Change to worksheet and cataloguing worksheet templates

Lead Thru Sets are sets of Marc Tags that are used when Catalogues are created. It is possible to add any extra ones or substitute an existing Tag for another.

1. Launch the *Amlib* client
2. Go to **Main > Catalogue > CatLeadThruSets** – the Lead Thru Sets table will display:

   ![Lead Thru Sets Table](https://help.oclc.org/Library_Management/Amlib/Authorities/RDA_Implementation)

   **Tag**  | **Description**
   --- | ---
   001 | Control number
   008 | Fixed Length Data Elements
   010 | LC Control Number
   020 | ISBN
   022 | ISSN
   035 | Local system control number
   040 | Cataloguing source
   041 | Language code

3. To **add or edit** a Marc Tag to a Lead Thru set:
   1. Adjust the tags displayed in the second column – tags must be separated by a space (the tags that are available can be checked from the lower box) – for example: 020 082 100 245 260 264 336 337 338 440 650 700
4. Click the **F3 Update** button when complete

Change stockitem display tags to add publisher

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemForms** – the Form Codes table will display:

   ![Form Codes Table](https://help.oclc.org/Library_Management/Amlib/Authorities/RDA_Implementation)
3. Select the form type you would like to set up/modify (for example: Books), and click the F9 Display button
4. The Stock Display Tags window will display:
5. Add 264 to the Publisher line next to the 260 Tag

To use a preferred instance of multiple tags enter the indicators in the form (n,n) immediately after the tag
Note: Use ** double quotes to indicate you want a space in the indicator

** NOTE: You can use these parameters for another form code by entering that form code here.

https://help.oclc.org/Library_Management/Amlib/Authorities/RDA_Implementation
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6. Each tag is separated by a space - type the tags in the order in which you would like them to appear, so if the item has a 264 Production Tag display that, but if the item does not have a 264 display the 260 Tag information.
7. Click the F3 Save button and close the window.
8. Repeat for all other Form codes.

Cat definitions for form codes

With the consistency expected in the 3xx Tags for Formats, it may be useful to revise the set up the Cat Definitions for each Form code to check what is in the 3xx Tags.

By setting the Cat Definitions for Forms, the correct Form codes are given to items as they are created. The Default codes do not need Cat Definitions as they will automatically be inserted unless an alternative rule applies.

Form Codes: Cat Definitions

Form Cat Definitions are found in the Window Menu of the Stockitem Form code screen.

1. Launch the Amlib client.
2. Go to Main > Stockitems > StockItemForms – the Form Codes table will display:

   ![Form Codes Table](image)

3. Highlight a Form code in the table – for example: AC – Audio Cassettes.
4. From the menu, select Window > CatDefs – the Form Codes for Catalogues window will display:
5. To set a Cat definition:
   1. Select a Tag number – for example: **300**
   2. Enter the data that MUST be present for valid items to be given this Form Code in the Must Contain field – for example: **Sound Cassette**
   3. Enter the data that MUST NOT be present for valid items to be given this Form Code in the Must Not field – for example: **CD**
   4. Click the **Paste** button
   5. Click the **F3 Save** button when complete

**Change display tags for NetOPACs**

As there are new Tags to display, it is important to check the Opac Display Tag settings.

It is possible to configure which Catalogue Tags display within the NetOPAC Catalogue Details window (via the MarcList.htm page - which is the page users go to when they click on an item title).

From the Marc Tags within the System screen you can:
• Select which tags do display
• Delete those tags that you want hidden (these will still be available in Cataloguing)
• Change the description of each Tag. For example they can be simplified without having any affect on what the Cataloguing staff use within Authority and Cataloguing. It will only affect what the User views within NetOPACs – Catalogue details

Note: These Notes describe how to import All the Authority Tags from the Authority manual and delete the ones to be hidden etc. However if you wish to retain the data currently on the window, it is possible to use the Insert Button to insert the New Tags as required (Someone may have already spent time setting these up so a decision can be made to import or just insert as needed)

1. Open the Supervisor module
2. From the menu, select LibraryMenu > Opacs > OpacDisplayTags – the Marc Tags within the System screen will display:

![Marc Tags Within the System](image)

3. Select From Auth button to import all current tags with those setup within Main > Authorities > MarcTags

Note: This will replace the information currently in the Table and replace it from the Authority, Marc Tag window so certain Tags will need to be deleted and descriptions modified.

4. A warning message will display
5. Click **Yes** to continue with the import of the Authority Tags

6. These Tags can then be deleted from this list and therefore hidden from the NetOPACs. They will still be unchanged within Authority and Catalogue
7. Highlight any Tags to be deleted (tags you do not want to show in the NetOPACs) and click **Delete**
8. They will be marked for Deletion with a cross in the left hand column
9. Repeat for any other Tags to be deleted
10. Select **Save** to carry out the deletions
11. A message will display to confirm the deletions
12. Select **Yes** to continue with the save

13. Adjust any Descriptions by clicking in the Tag Description column and adjusting as necessary
14. Select **Update** to save the changes then log out of Amlib and back in

15. Your IT staff will then need to stop and start the NetOPACs service for the changes to take effect

**Marc Take-up**

No change will need to be made to the procedure to bring in Marc Tags. As long as the Tags are defined as above they will come into the catalogue record

You will note changes in the data
<table>
<thead>
<tr>
<th>Field Tag</th>
<th>Field</th>
<th>Indicators</th>
<th>Data Recorded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader/06</td>
<td>Type of record</td>
<td>i</td>
<td></td>
</tr>
<tr>
<td>Leader/07</td>
<td>Bibliographic level</td>
<td>m</td>
<td></td>
</tr>
<tr>
<td>Leader/18</td>
<td>Descriptive cataloguing form</td>
<td>i</td>
<td></td>
</tr>
<tr>
<td>FIELD TAG</td>
<td>MARC FIELD</td>
<td>INDICATORS</td>
<td>DATA RECORDED</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------</td>
<td>------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Leader/19</td>
<td>Multipart resource record level</td>
<td>a</td>
<td></td>
</tr>
<tr>
<td>007/00</td>
<td>Physical description fixed field – Category of material</td>
<td>s</td>
<td></td>
</tr>
<tr>
<td>007/01</td>
<td>Physical description fixed field – Specific material designation</td>
<td>d</td>
<td></td>
</tr>
<tr>
<td>007/06</td>
<td>Physical description fixed field – Dimensions</td>
<td>g</td>
<td></td>
</tr>
<tr>
<td>007/12</td>
<td>Physical description fixed field – Special playback characteristics</td>
<td>e</td>
<td></td>
</tr>
<tr>
<td>007/13</td>
<td>Physical description fixed field – Capture and storage technique</td>
<td>d</td>
<td></td>
</tr>
<tr>
<td>008/35-37</td>
<td>Fixed length data elements – Language</td>
<td>eng</td>
<td></td>
</tr>
<tr>
<td>020</td>
<td>International Standard Book Number</td>
<td>##</td>
<td>$a 0864923988 : $c $29.95 (Can) $24.95 (US)</td>
</tr>
<tr>
<td>037</td>
<td>Source of acquisition</td>
<td>##</td>
<td>$b <a href="http://www.gooselane.com">http://www.gooselane.com</a></td>
</tr>
<tr>
<td>040</td>
<td>Cataloguing source – description conventions</td>
<td>##</td>
<td>$e rda</td>
</tr>
<tr>
<td>100</td>
<td>Main entry – Personal name</td>
<td>1#</td>
<td>$a Munro, Alice, $d 1931-$e author</td>
</tr>
<tr>
<td>FIELD TAG</td>
<td>MARC FIELD</td>
<td>INDICATORS</td>
<td>DATA RECORDED</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------------------------</td>
<td>------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>245</td>
<td>Title statement</td>
<td>10</td>
<td>$a Lives of girls and women / $c Alice Munro.</td>
</tr>
<tr>
<td>250</td>
<td>Edition statement</td>
<td>##</td>
<td>$a Abridged / $b by Ruth Fraser.</td>
</tr>
<tr>
<td>264</td>
<td>Production, publication,</td>
<td>#1</td>
<td>$a Fredericton, NB, Canada : $b BTC Audiobooks, an imprint of Goose Lane</td>
</tr>
<tr>
<td>264</td>
<td>Production, publication,</td>
<td>#4</td>
<td>$c ©2005</td>
</tr>
<tr>
<td></td>
<td>distribution, manufacture,</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and copyright notice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>300</td>
<td>Physical description</td>
<td>##</td>
<td>$a 3 audio discs (approximately 3 hr.) ; $c 12 cm.</td>
</tr>
<tr>
<td>336</td>
<td>Content type</td>
<td>##</td>
<td>$a spoken word $b sw $2 rdacontent</td>
</tr>
<tr>
<td>337</td>
<td>Media type</td>
<td>##</td>
<td>$a audio $b s $2 rdamedia</td>
</tr>
<tr>
<td>337</td>
<td>Media type</td>
<td>##</td>
<td>$a computer $b c $2 rdamedia</td>
</tr>
<tr>
<td>338</td>
<td>Carrier type</td>
<td>##</td>
<td>$a audio disc $b sd $2 rdacarrier</td>
</tr>
<tr>
<td>338</td>
<td>Carrier type</td>
<td>##</td>
<td>$a computer disc $b cd $2 rdacarrier</td>
</tr>
<tr>
<td>FIELD TAG</td>
<td>MARC FIELD</td>
<td>INDICATORS</td>
<td>DATA RECORDED</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------------</td>
<td>------------</td>
<td>----------------------------------------------------</td>
</tr>
<tr>
<td>344</td>
<td>Sound characteristics</td>
<td># #</td>
<td>$a digital $b optical</td>
</tr>
<tr>
<td>347</td>
<td>Digital file characteristics</td>
<td># #</td>
<td>$a audio file $b CD audio</td>
</tr>
<tr>
<td>500</td>
<td>General note</td>
<td>##</td>
<td>$a Originally broadcast on CBC Radio 1981.</td>
</tr>
<tr>
<td>508</td>
<td>Creation/production credits note</td>
<td># #</td>
<td>$a Credits: producer, Lawrie Seligman; recording engineer: Eric Wagers.</td>
</tr>
<tr>
<td>511</td>
<td>Participant or performer note</td>
<td>0#</td>
<td>$a Narrated by Judy Mahbey.</td>
</tr>
<tr>
<td>520</td>
<td>Summary, etc.</td>
<td>##</td>
<td>$a Born on the backward “Flats Road,” Del Jordan is a “nice girl” with big dreams in a small town that expects little from women beyond marriage and babies. In linked</td>
</tr>
</tbody>
</table>
short stories, Del suffers embarrassment at the hands of her encyclopedia-selling mother, endures her body’s insistent desires, and falls passionately in love with a young lumberyard worker, only to lose her chance for a university scholarship.

<table>
<thead>
<tr>
<th>FIELD TAG</th>
<th>MARC FIELD</th>
<th>INDICATORS</th>
<th>DATA RECORDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>700</td>
<td>Added entry – Personal name</td>
<td>1#</td>
<td>$a Fraser, Ruth, $e abridger.</td>
</tr>
<tr>
<td>700</td>
<td>Added entry – Personal name</td>
<td>1#</td>
<td>$a Mahbey, Judy, $e narrator.</td>
</tr>
<tr>
<td>700</td>
<td>Added entry – Personal name</td>
<td>1#</td>
<td>$a Seligman, Lawrie, $e producer.</td>
</tr>
<tr>
<td>700</td>
<td>Added entry – Personal name</td>
<td>1#</td>
<td>$a Wagers, Eric, $e recording engineer.</td>
</tr>
</tbody>
</table>

**Useful links**

- OCLC [http://www.oclc.org/research/activities/frbr.html](http://www.oclc.org/research/activities/frbr.html)