# RDA as modified by CSR: recommended guidelines

*These guidelines were prepared to support the RDA testing by CONSER catalogers with input from various people. The guidelines provide information on the differences between CSR, RDA Core, and LCPS and how to use existing CONSER OCLC bibliographic records for serials during the test.*

Reiteration of basic CSR principles:

- CSR was developed using FRBR user tasks (so is coming from the same foundation as RDA)

- The CONSER standard record emphasizes access points over extensive descriptive detail.

- Every CONSER standard record minimally contains the mandatory elements as defined by the CONSER Standard Record Metadata Application Profile (MAP).

- The CONSER standard record does not preclude the use of any data in a bibliographic record. Catalogers may supply any additional data elements or fields required by the nature of the resource, local needs, or cataloger judgment.

General guidance for resolving differences between RDA Core and CSR mandatory set:

When producing an RDA bibliographic record as modified by CSR guidelines for the RDA test, follow CSR as implemented by your institution for the type of materials you catalog.

1) When RDA Core requires you to provide data not defined as mandatory by the CSR, you may:
   a. omit the data per your institution's implementation of CSR's elements, or
   b. provide the data if required by your institution's RDA testing policy

2) When CSR guidelines require you to provide data not defined as core for RDA, you may:
   a. follow the CSR guidelines and provide the data per your institution's implementation of CSR's elements, or
   b. omit the data per your institution's RDA testing policy

# Differences between CSR, RDA, and LCPS

| Data Element | CSR | RDA | LCPS |
|---|---|---|---|
| **130/240** | Required for identical monograph series and generic <u>titles</u> as described in LCPS 6.27.1.9 (formerly LCRI 25.5B) | Required to distinguish the serial <u>work</u> from another serial <u>work</u> with the same title. 6.27.1.9. | LCPS 6.27.1.9 |
| translations or language editions | Use an added entry (in addition to any 765 or 775 linking field) to provide collocation with the original language edition. Include the name of the language of the resource being cataloged in subfield $l of the 730 field.<br><br>It is not required to create or add a uniform title either as a main entry heading or in conjunction with a personal or corporate name main entry heading for translations or language editions. Instead, | A collocating uniform title (coded 130 or 240) is constructed to distinguish language expressions.<br><br>If the work is published simultaneously in the same language under different titles, choose the title proper of the first resource received as the preferred title. 6.2.2.4. | |
| **245** $b Other title information | CSR does not require catalogers to transcribe other title information unless it provides clarification or support to the title proper that otherwise might appear misleading without the other title information. | Not core in RDA. | LCPS 2.3.4: Other title information is a core element for LC. |
| $b Parallel title proper | Not required. | Not core in RDA. | LCPS 2.3.3 Parallel title is a core element for LC. |
| **$c** Statement of responsibility | Not required. | Core element in RDA (2.4.) | |

| | | | |
|---|---|---|---|
| **260 $c** | It is not required to supply dates in 260$c | Publication date is a core element. (2.8.6) | |
| **300** | Required for tangible non-print formats only. | 3.4.1.10, RDA 3.4.5.16 | LCPS 3.4.1.4<br><br>If complete extent is not known, LC catalogers will not put anything in 300 $a for serials and multipart monographs. |
| **321** | It is not required to provide former frequency notes on original records. If there is a former frequency in field 310, move the former frequency to field 321, and add the current frequency in field 310. Prefer to leave existing 321 fields on an existing record, even if more than three. (Reminder: outdated fixed field information for frequency and regularity should be updated with current frequency information.) Catalogers can make the choice of adding 321 fields or adding a frequency varies note. | 2.20.12.4 alternative to make a note if changes have been numerous. | |
| **588** | The CSR requires description based on (DBO) information, the source of title, and latest issue consulted information on all CSR records even if it is the same recorded in the 362 area. Title source is given even if the source is a title page. | 2.20.2.3, LCPS 2.20.2.3, 2.20.13 | 2.20.13 Description based on note is required for LC. |

# Using existing OCLC bibliographic records for serials: CONSER RDA testers

| Category of record | | Current Cataloging (first time cataloging for an institution) | Record Maintenance |
|---|---|---|---|
| Unauthenticated | RDA 040 $e rda | Authenticate as RDA record. Do not convert the record to AACR2. | Update/add descriptive fields per your institution implementation of RDA and CSR's elements. Ensure that access points are in RDA form and RDA form is recorded in LC/NAF. |
| | AACR or unspecified Desc = a or # | May convert the record to RDA if required by institutional RDA testing policy. If converted to RDA, add your institution's symbol following "RDA=" in field 936. If not converting, do not add any RDA elements. | If converted to RDA, update/add descriptive fields per your institution implementation of RDA and CSR's elements. Ensure that access points are in RDA form and RDA form is recorded in LC/NAF. Add your institution's symbol following "RDA=" in field 936. |
| Authenticated<br><br>Encoding level: #, 5, 8, 7<br><br>010 LCCN<br><br>042 pcc<br>   msc<br>   nsdp<br>   lccopycat<br>*(also codes*<br>   lc *and* lcd<br>*found in records authenticated before May 1, 2009)* | RDA 040$e rda | Do not convert the record to AACR2. | Update/add descriptive fields per your institution implementation of RDA and CSR's elements. Ensure that access points are in RDA form and RDA form is recorded in LC/NAF. |
| | AACR2 Desc = a | May convert the record to RDA if required by institutional RDA testing policy. If converted to RDA, add your institution's symbol following "RDA=" in field 936. If not converting, do not add any RDA elements. | If converted to RDA, update/add descriptive fields per your institution implementation of RDA and CSR's elements. Ensure that access points are in RDA form and RDA form is recorded in LC/NAF. Add your institution's symbol following "RDA=" in field 936. |
| | | Or, accept the AACR2 record as authenticated according to CONSER cooperative cataloging practice. | No RDA elements can be added to the master AACR2 record. Edit the AACR2 record according CEG B4. |
| | Pre-AACR Desc = # | May convert the record to RDA if required by institutional RDA testing policy. If converted to RDA, add your institution's symbol following "RDA=" in field 936. | If converted to RDA, update/add descriptive fields per your institution implementation of RDA and CSR's elements. Ensure that access points are in RDA form and RDA form is recorded in LC/NAF. Add your institution's symbol following "RDA=" in field 936. |
| | | Or, accept the pre-AACR2 record as authenticated according to CONSER cooperative cataloging practice. | No RDA elements can be added to the master pre-AACR record. Edit the pre-AACR record according CEG B4. |

These policies are for the US RDA Test period only.

Reminder of OCLC June 15, 2010 decisions:
- May add original cataloging RDA records.
- May convert an AACR2 record for a continuing resource to an RDA record.
- May not convert an RDA record to an AACR2 record.
- May not create a duplicate record based on a different cataloging standard.
- May locally edit records created under any cataloging standard to another standard but may not replace the master record.

Other questions raised to OCLC on Sept. 7, 2010:
- What happens if any of the records eligible to be converted already have 040 $e for another standard (e.g., dacs, amim)?
That subfield is now repeatable.
 OCLC policy:  Our understanding is that it's OK for 'dacs' or 'amin' to appear with 'rda' even though all the work to examine those guidelines for consistency with RDA has not been completed..
- May some RDA elements (e.g., fields 336-338) be removed from and some AACR2 elements (e.g., a GMD) be added to an RDA record?
 OCLC policy:  For local editing or for the creation of institution records:  yes.  For master records: no.