

Getting a Handle on the New RDA Toolkit

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Resource Description & Access

Today's Topics

- Stabilization of the English text
- New concepts
- Old concepts, rethought
- What's the same / similar?
– *handoff to James Hennelly* –
- Navigating the Beta site
- Next steps
 - Orientation Project
- Q&A
 - Both Kathy and James

Stabilization

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What is Stabilization?

- New Phase of 3R Project (RDA Restructure and Redesign) – effective 30 April 2019
 - Beta site no longer under continuous revision
 - Will start documenting and publicizing changes again
 - But in a somewhat different form
 - English language text stable for
 - Value vocabularies
 - Element sets
 - Entity and element chapters
 - Guidance and resource chapters
 - Serves as baseline text for
 - Translators, Policy Statement writers, application profile developers, authors of supplementary materials, etc.

Stable, but not unchanging

- May still modify RDA in the following categories
 - Minor editorial changes
 - Correction of typos and obvious errors
 - Edits to improve consistency
 - Better wording to support translations
 - Additional changes, if
 - They will not have a significant impact on translators, policy statement writers, etc.
 - They do not affect the outcome of applying the instructions
 - Add/revise examples
 - Including for RDA translations
 - Improvements/additions to the Toolkit interface

Stabilization ≠ Official

- This phase ***does not*** start the countdown clock on the original Toolkit



Suggesting Changes Now?

- During the stabilization phase
 - Use the feedback form (<https://www.rdatoolkit.org/form/3r-feedback>) to
 - Report errors
 - Ask questions
 - Work within your regions to identify additions or areas for improvement
 - EURIG: <http://www.rda-rsc.org/europe>
 - NARDAC: <http://www.rda-rsc.org/northamerica>
 - ORDAC: <http://www.rda-rsc.org/oceania>
 - Elsewhere: contact me – RSCChair@rdatoolkit.org
 - Respond to calls for participation in focused RSC Working Groups, or to assignments to your region
- Major changes will have to wait until the beta site becomes the official version of RDA



What's Changed from the Original RDA? Influence of the IFLA Library Reference Model

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More Relationships, Fewer Attributes

- Relationship = a specific association between two RDA entities
 - Formerly known as “relationship designators”
 - Now elements in their own right, with their own element pages
 - Inherently reciprocal – inverses formally declared and have their own element pages
 - Jeff Bezos *chief executive of* Amazon
 - Amazon *chief executive* Jeff Bezos
- Attribute = a characteristic of an RDA entity
 - For example:
 - content type
 - dimensions

New Entities from LRM

- *agent*
 - A person or two or more persons capable of acting as a unit
 - Must be real human beings
- *collective agent*
 - Includes a corporate body and a family
- *nomen*
 - Associates a combination of signs or symbols (an appellation) with an RDA entity
 - Identical strings may refer to different entities [Anne O'Connor]
 - One entity may have many nomen [Charles Dickens / Boz / Timothy Sparks]
- *place*
 - A given extent of space, although the boundaries may change over time
- *timespan*
 - A duration of time, which can be very specific or can be a broad range

New Concepts from LRM

- Representative expression elements
 - Characteristics that
 - “Live” at the Expression level
 - Become identified as Work attributes because they best represent the intention of the creator
 - Original language, intended audience, date, duration, medium of performance, etc.
 - For one work, different attributes can come from different expressions
 - Example:
 - For a colorized film, record “monochrome” as the *colour content of representative expression*

New Concepts from LRM

- Manifestation statements
 - Transcribed from the manifestation
 - Recording method = Unstructured description
 - How the resource represents itself
 - Supports machine transcription derived from digitized and born-digital manifestations
 - 13 sub-types, including *manifestation title and responsibility statement*
 - The more “traditional” individual elements remain, such as
 - *title proper*
 - *other title information*
 - *statement of responsibility relating to title proper*

New Concepts from LRM

- Appellation elements

- Includes existing elements (preferred name, title, etc.) & new elements (access point, authorized access point, variant access point)
 - These 96 elements have undergone review and updating for consistency
 - Principles applied to place instructions in the appropriate elements – for example

Appellation of person

Name of person

Preferred name of person

Variant name of person

Access point for person

Authorized access point for person

Variant access point for person

Identifier for person

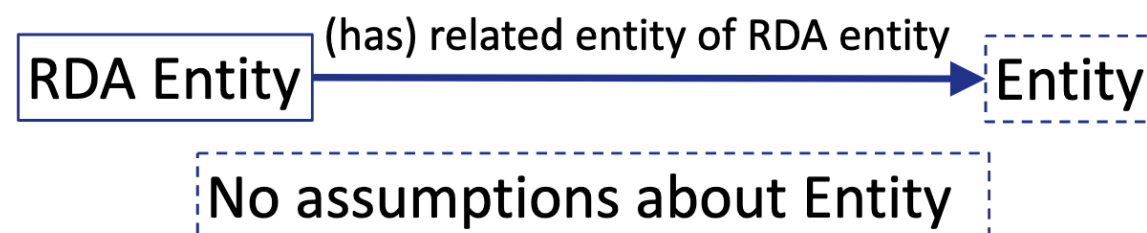
Different from LRM

- *RDA Entity*

- An abstract class of key conceptual objects – of interest for resource discovery
- The top entity in the model, as implemented in RDA
 - Encompasses all other RDA entities
- Narrower than LRM's *res*

- *Related entity of [agent/nomen/place/work/etc.]*

- Allows for referring from an RDA entity to a model outside of RDA



Changes because of LRM

- *person* = a real human being
 - No longer encompasses fictitious or legendary characters, or real non-human entities
 - Also true for *agent*, *collective agent*, and *family*
- Where does that leave fictitious/legendary persons and real non-human entities?
 - Fictitious personages named in manifestation title and responsibility statements are assumed to be pseudonyms of a *person* or *collective agent*
 - Accommodated as *nomen*, just like any other pseudonym
 - Animals and other non-human performers in manifestation title and responsibility statements (credits) are accommodated as non-RDA entities



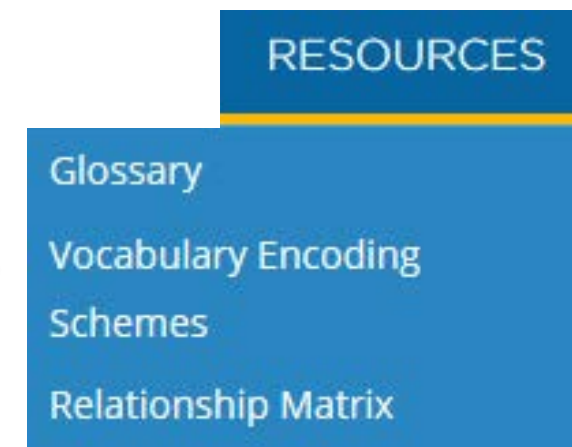
What's Changed from the Original RDA? Influence of Linked Data

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Old Concepts, New Terms

- Vocabulary Encoding Scheme

- Controlled values for elements
 - Some within RDA, available through relevant element chapters as well as the Resources tab
 - Also includes
 - Codes from an ISO list
 - Authority control system terms, codes, etc.
 - Entries from other standardized lists



- String Encoding Scheme


- Specification of how to construct a particular string
 - Such as instructions about how to construct or modify access points

New Concepts

- Data provenance
 - Where the information came from
 - Encompasses
 - “Sources of information” from the original Toolkit
 - Information from a reference source (including source consulted)
 - Who created the record (or the “metadata work”)

New Concepts

- Domain and range

- Available under  Element Reference for each element
 - Domain: Entity that is described by an element
 - Range: Entity that is the value of a relationship element
 - Example: *date of capture*
Domain: Expression
Range: Timespan
- Attributes do not have range
 - Example: *carrier type*
 - Domain: Manifestation

What's Changed from the Original RDA? Other Changes of Note

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New Concepts

- Diachronic works
 - Issued over time
 - Can be monographs, serials, or integrating resources
 - Includes
 - aggregates (compilations)
 - multipart monographs issued over time
 - single works (a serialized novel)

Le Monde

The Green Mile


a serial novel in six volumes

by Stephen King

Published March 28-August 29, 1996

New Concepts

- Alternative labels

- Available under  Element Reference for each element
- Includes
 - Verbalized terms, which help in understanding the direction of relationship elements
 - Element name: *employer*
 - Alternative label: *has employer*
 - “Retired” labels from the original Toolkit where applicable
 - “Earlier title proper” and “Later title proper” have been subsumed by *title proper*
 - These were valid titles proper at a given point in time

New Concepts

- Condition/option boxes
 - Replace
 - Optional addition
 - Optional omission
 - Exception
 - Alternative
- When the instruction has at least one condition
 - Option is to apply the instruction
 - The same set of conditions may lead to different options

Single Condition/Option

- From “authorized access point for work”

Work of uncertain or unknown origin

CONDITION

A work is created by an unknown or unnamed agent.

OPTION

Record a value that is based on Work: **preferred title of work** .

 Example

Single Condition/ Multiple Options

Names of person in more than one language

CONDITION

A value of a name appears in more than one language in manifestations.

OPTION

Record a value that is in a language that appears most frequently in manifestations.

OPTION

Record a value that appears most frequently in reference sources in a language that is preferred by an agent who creates the metadata.

Multiple Conditions/ Single Option

Preferred titles of works that are created after 1500

CONDITION

A value of Work: **date of work**  is after 1500.

A value of Manifestation: **title proper**  of manifestations that embody expressions in an original language of a work appears frequently in sources of information.


OPTION

Record a value of Manifestation: **title proper**  in an original language.

Multiple Conditions/ Multiple Options

Names of family consisting of a given name or a word or phrase

CONDITION

A name of a family consists of a value of Person: **given name** .

A value of a name appears in more than one language in manifestations.

OPTION

Record a value that appears most frequently in reference sources in a language that is preferred by an agent who creates the metadata.

OPTION

In case of doubt, record a value in a native or adopted language of a person, or the Latin form.

Option, No Conditions

- From “title proper”

Recording an unstructured description

OPTION

Record a value of Manifestation: **title of manifestation** .

OPTION

Record a Manifestation: **note on manifestation**  on the source or basis for a value of a title proper.

Enhanced Concepts

- Transcription guidelines
 - “Take what you see” – very literal
 - Modified transcription – what catalogers do now: adjust capitalization, add diacritics, etc.
 - Choice up to cataloging agency
 - May depend on source of cataloging (vendor data vs. original record)
- Aggregates
 - New approach, grounded in LRM
 - Three types
 - collection aggregate [collection of short stories]
 - augmentation aggregate [book + preface, index, etc.]
 - parallel aggregate [Iliad in Greek + Latin + English]

Enhanced Concepts

- Recording methods
 - Four means of capturing data
 - Not mutually exclusive
 - Regularization of what was already in RDA
 - Unstructured description [transcribed information, notes]
 - Structured description [access points, controlled vocabulary terms]
 - Identifier [ISBN, ISNI]
 - IRI [Used for linked data implementations]
 - Choice among these is also an option in many cases
 - Need application profile, policy statements, and/or best practices to help choose

Enhanced Concepts

- Agent “breakout”

- Now have separate elements for relationships that apply to all types of agents
 - Explicitly declared, rather than relying on the hierarchy
 - Improves training; won’t have to remind catalogers to look for general relationships under *agent* instead of the more specific elements such as *person* or *corporate body*
 - Get some odd element names, but these **do not** have to be used for display
 - *editor agent of text*
 - *editor collective agent of text*
 - *editor corporate body of text*
 - *editor family of text*
 - *editor person of text*

An agency could decide to **display** all of these as “editor of text”

What's Changed? Old Concepts, Left Behind

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What's Missing?

- Instruction numbers
 - Instead, “citation numbering” coming soon
 - For use with print materials and other non-digital communications
 - Format will be ##.##.##.##
 - Numbers will be random, permanent, and searchable
 - Numbers will be accessible from the popup tool bar
- PDF of index
 - Instead, rely on searching functions
- Actionable links between AACR2 and RDA
 - Too much has changed, too hard to maintain



What's the Same (or Similar)?

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Many of the Instructions

- Commitment by the RSC that the 3R restructuring process would have minimal impact on current practice
 - Except when instructions had to change as part of implementing LRM
- Kept existing instructions whenever possible
 - Some rewording may have occurred, but outcome of applying these instructions should be similar
 - Will have “soft-deprecated” elements
 - *details of file type* [RDA 3.19.2.4] present in Beta Toolkit, but...
 - Better to: record this as an *unstructured description of file type*
- With more options about how to record data
 - Can keep recording data the same way
 - Can try something different that works better for your users

Parallel Title Proper - Excerpt

If:

an original title is in a language different from that of a title proper

and

the title is presented as an equivalent to a title proper

then:

record it as a parallel title proper.

Original Toolkit

CONDITION

An original title is in a language different than that of a title proper.

An original title is presented as an equivalent parallel title proper.

Beta Toolkit

OPTION

Record the original title as a *parallel title proper*.

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Names as Titles - Excerpt

Names of Agents 2015/04

If a title consists solely of the name of an agent, record the name as the title.

Original Toolkit
(under recording titles)

Titles consisting of a name of an agent

CONDITION

A value of Manifestation **manifestation title and responsibility statement**  consists only of a name of an agent.

Beta Toolkit
(from title of manifestation)

OPTION

Record the name as a title.

Some Glossary Definitions

- **Original Toolkit: date of birth**
 - A year a person was born.
Date of birth may also include the month or month and day of the person's birth.
- **Beta Toolkit: date of birth**
 - A timespan during which a person was born.
Inverse: date of birth of
- **Original Toolkit: form of work**
 - A class or genre to which a work belongs.
- **Beta Toolkit: category of work**
 - A type to which a work belongs.
Includes a class or genre.
Use for: form of work

MARC Mappings

337		Media type		
337	a with subfield \$2 = "rdamedia"	Media type term	3.2 RDA	Media Type
337	b with subfield \$2 = "rdamedia"	Media type code	3.2 RDA	Media Type

Original Toolkit

media type

Definition and Scope

A categorization reflecting the general type of intermediation device required to view, play, run, etc., the content of a manifestation.

Element Reference

...

- MARC 21 Bibliographic

MARC 21 Bibliographic 337 ** \$a [structured description]

MARC 21 Bibliographic 337 ** \$b [structured description]

Beta Toolkit

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For More Information

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RDA Resources

- RDA Steering Committee website:
 - <http://www.rda-rsc.org/>
 - 2019 Presentations page: <http://www.rda-rsc.org/node/589>
 - 3R Project Frequently Asked Questions: <http://rda-rsc.org/node/551>
- RDA Toolkit website:
 - <https://www.rdatoolkit.org>
 - 3R Project updates: <https://www.rdatoolkit.org/3RProject>
- Beta Toolkit:
 - <https://beta.rdatoolkit.org/RDA.Web/>
 - Must have a login to the original Toolkit, or make arrangements with ALA Publishing
- RDA YouTube channel:
 - <https://www.youtube.com/c/RDAToolkitVideo>

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James Hennelly
Director, RDA Toolkit



Subscribe to the RDA Toolkit YouTube channel

youtube.com/c/RDAToolkitVideo

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Beta site now available
<https://beta.rdatoolkit.org>

RDA Toolkit
245 subscribers

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Video Title	Views	Time
RDA-ONIX Framework New Content Types and New...	134 views	20:34
Relationship Elements	250 views	40:40
Appellation Elements	149 views	24:44
A deeper dive into application profiles and policy...	229 views	32:17
A deeper dive into Nomen and appellations	245 views	26:49
New Ways of Working? - The RSC in the Post 3R Era	90 views	16:49

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April 30th release

- Stabilization
- Fixes to existing features
 - Search
 - HTML editor
- Addition of new features
 - Breadcrumbs
 - Document Data
 - AACR2
- May Follow-up

Improved Search

- No Boolean terms
- Assumes AND relationship between search terms
- Use * for wildcard
- Use “ ” for phrases
- Search on instruction numbers is limited

Improved Search

- Highlighted search terms in results

The screenshot shows the RDA search interface. On the left, the 'Search Results' page includes filter options for 'carrier' and 'type', a 'Refine Search' box, and a 'Display Results' dropdown set to 'Relevance'. A list of 'RDA Documents' is shown with sections like 'All', 'Entities', 'Elements', 'Glossary', 'Guidance', 'Resources', and 'Relationship Matrix'. The main content area lists search results, with 'carrier type' highlighted in yellow. A detailed view of the 'carrier type' element is shown on the right, including its definition and scope, an 'Element Reference' button, and a 'Prerecording' section.

Search Results carrier × type ×

Filter Results

Refine Search

Display Results

Relevance

RDA Documents

Sections

- All
- Entities
- Elements
- Glossary
- Guidance
- Resources
- Relationship Matrix

RDA Documents (10 of 79)

RDA Carrier Type
Vocabulary Encoding Schemes : L

carrier type
...carrier type 3.3 Definition and
Element : Last Updated - 2019/04/

type of carrier
...See: carrier type ...
Glossary Term : Last Updated - 2019/0

carrier type
...storage medium and housing of
intermediation device required to
Glossary Term : Last Updated - 20

RDA carrier and content categorization
...RDA carrier and content cate
RDA carrier type , content type
categorization . For...

Manifestation > carrier type
carrier type

Definition and Scope

A categorization reflecting the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run, etc., the content of a manifestation.

Prerecording

The RDA Carrier Type vocabulary encoding scheme is derived from the RDA/Onix Framework for Resource Categorization..

For general guidance on carrier and content categories, see Content and carrier.

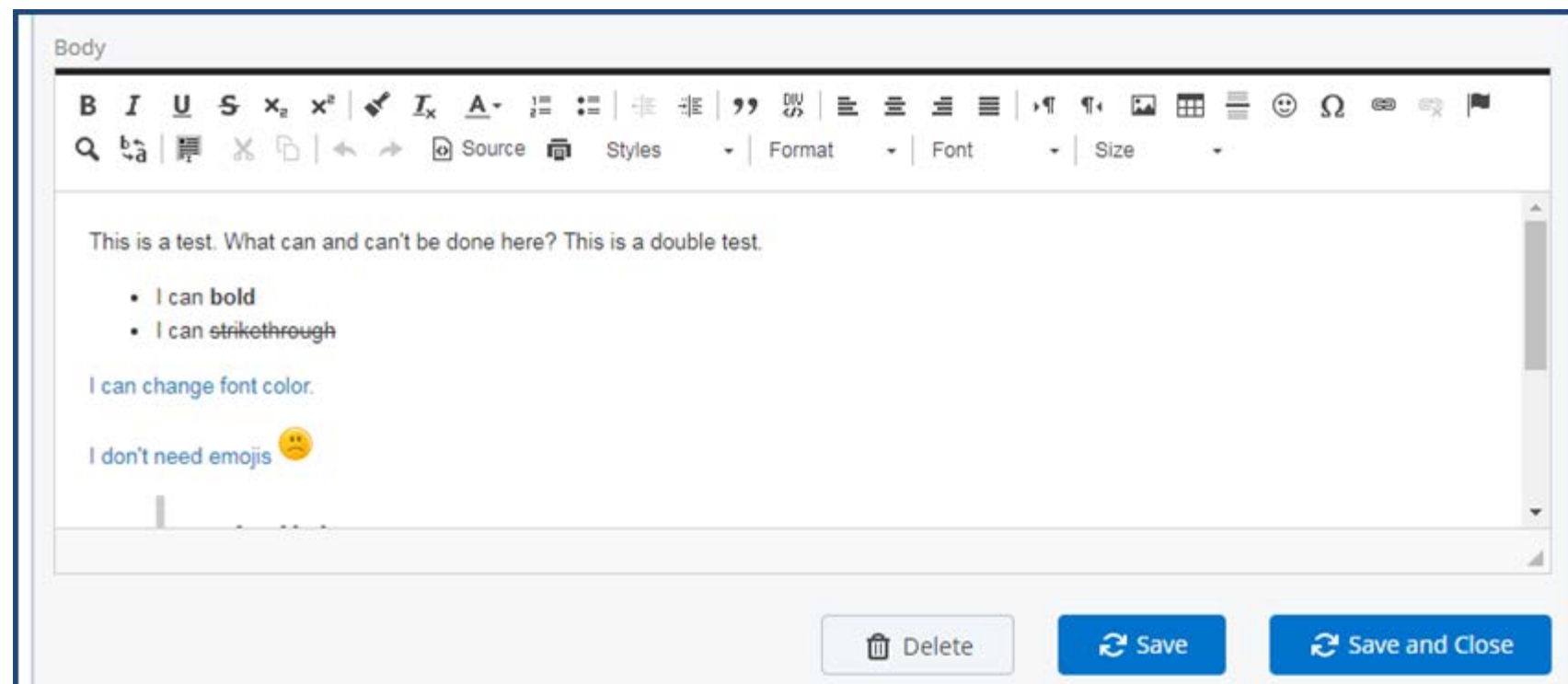
Improved Search

- Filtering of search results fixed

The screenshot displays the 'Search Results' interface for the RDA Toolkit. At the top, there are filters for 'carrier' and 'type'. Below this, the 'Filter Results' section includes a 'Refine Search' input field. The 'Display Results' section shows 'Relevance' as the sorting method. A sidebar on the left, titled 'RDA Documents', lists various sections: All, Entities, Elements, Glossary (which is checked and circled in red), Guidance, Resources, and Relationship Matrix. The main content area shows 'RDA Documents (10 of 54)' with several results listed, including 'type of carrier', 'carrier type', 'category of carrier', 'RDA base carrier category', and 'audio cylinder'. Each result includes a brief description and a 'Glossary Term : Last Updated - 2019/04/30' label. The terms 'carrier' and 'type' are highlighted in yellow in the descriptions.

Improved HTML Editor

- Expanded toolbar
- Source view

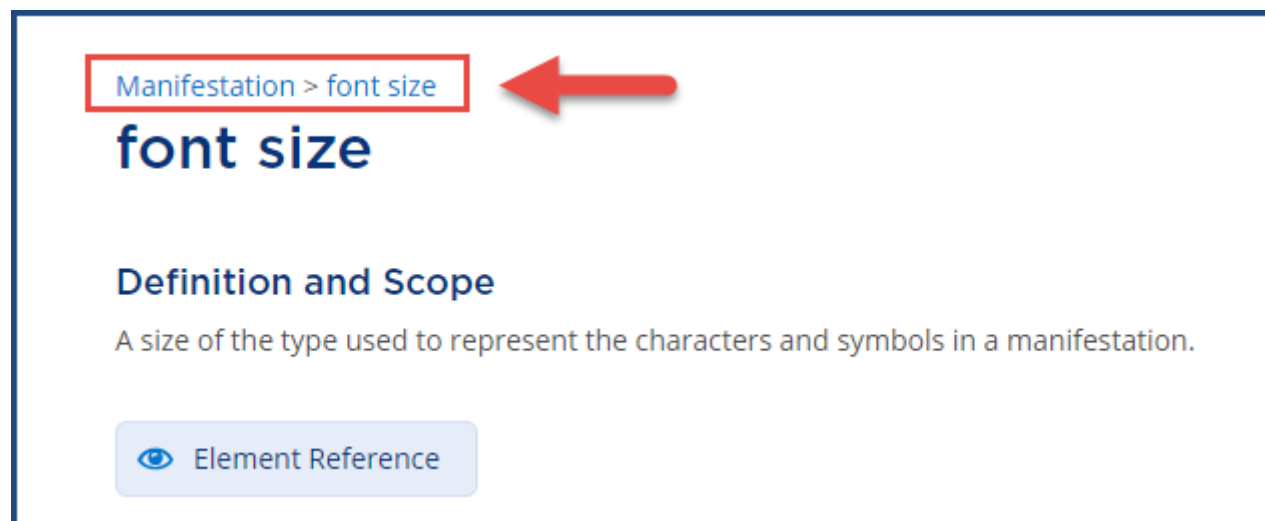


Breadcrumb Navigation

Breadcrumbs have been added to the beta site display to...

- provide more context for instructions and
- improve navigation of the beta site.

The breadcrumbs are linked.



Visual Browser

- The feature was as both a tool for
 - navigation and
 - Education.
- This feature is no longer an objective of the 3R Project due to
 - complexity and
 - cost.
- Breadcrumb navigation is the alternative for now.
- Exploration of a better method of addressing the original goals.
 - Return to the visual browser approach?
 - Expanding and enriching breadcrumbs?

Data Document

- The Document Date reflects the last update to the page
 - Dates are changed only for reported changes to the page
 - Dates are formatted yyyy/mm/dd
- The Document URL is also recorded at the bottom of the page
 - The URLs will be cleaned up a bit in the May follow-up

Related Elements

For broader elements, see

Corporate Body: [access point for corporate body](#)

Collective Agent: [authorized access point for collective agent](#)

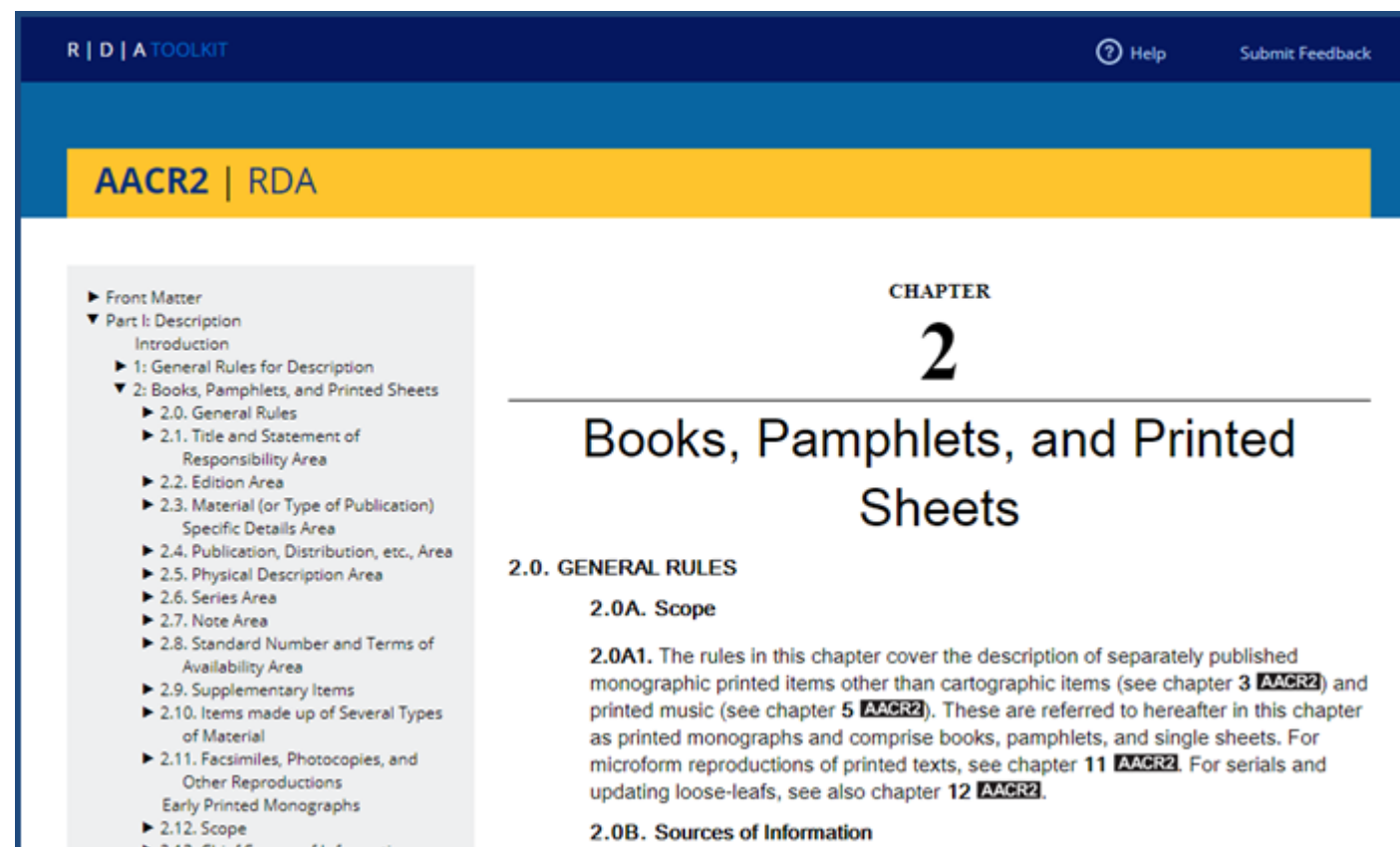
For the inverse of this element, see Nomen: [authorized access point for corporate body of](#).

Document Date: 2019/04/30
Document: https://beta.rdatoolkit.org/RDA.Web/Content/Index?externalId=en-US_ala-43203e6d-43a6-3b53-80af-756510436857

[← author corporate body of](#) [binder corporate body of →](#)

AACR2

- Linked at the bottom of the Resources tab
- Requires a Toolkit subscription to access
- Includes an expand/collapse browse
- No search feature
- Includes cross-reference links
- No links to RDA
- No expected updates or enhancements to the site



May Follow-Up

- Likely May 22nd
- Citation Numbering
- Print PDFs
- New Administration Site
- Help

Citation Numbering

Additional notes:

- Numbers are available in
 - Entity/Elements pages
 - Guidance Pages
 - Related Resources (middle section of Resources tab)
- Numbers are associated with
 - All headers
 - ✓ except Definition and Scope, Element Reference, and Related Elements
 - Conditions
 - Options

Print PDFs

- Click Print icon to open PDF
- PDF of only page being viewed
- No Print RDA
 - Print Glossary (later this year)
 - RDA Essentials (next year)
 - Book of Examples (in development)

Admin Site and Help

Administration Site

- Management of staff profiles
- Set institutional views

Help Guide

- Cover all features and functionality through May follow-up release
- Also look for updates to YouTube channel

Accessibility

- Notable steps have been made to bring the site up to code for WCAG 2.1 AA standard.
 - Keyboard accessibility has been implemented.
 - Screen reader accessibility has been partially implemented.
- Further remediation is still needed to attain this goal.
 - e.g., Cognitive and visual accessibility review
- After the May follow-up release, a third party evaluation of the site will be conducted, followed by further remediation.
- WCAG 2.1 AA compliance remains the goal.

Orientation Project

This webinar marks the start of the Orientation Project.

- Live webinar series
- Online courses
- Regular Toolkit Demonstrations
- YouTube channel and other online resources

Orientation Project

Goals

- Assure that users are comfortable with the navigation and features of the redesigned RDA Toolkit
- Introduce users to core concepts of the revised standard
- Clarify the impact of RDA's implementation of the Library Reference Model
- Illustrate approaches to RDA and RDA Toolkit that may be useful to LIS instructors

Online Orientations

2 series to run in July and August; LIS focused event in August

New Concepts

- Nomens and Appellations
- Timespan and Place
- Representative Expressions and Manifestation Statements
- Relationship Elements
- Fictitious and Non-human Personages

Online Orientations

Special Topics

- Application Profiles
- Aggregates and Diachronic Works
- Recording Methods and Transcription Guidelines
- Authority Control and Creating Access Points
- Data Provenance

LIS

- Teaching RDA after 3R

Coming Soon

- Next Release likely in August
- Will include Release Notes
- Sample Policy Statements (Not real ones)
- Translations?
- Continued evaluation of feedback

Beta Site Development Continues

Questions?

Ask now, or email us later at:

RSCChair@rdatoolkit.org

jhennelly@ala.org

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