

RDA Beta Toolkit: Present and Future

Kathy Glennan

Chair, RDA Steering Committee

Head, Original & Special Collections Cataloging, University of Maryland

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Resource Description & Access

What is RDA?

RDA: Resource Description & Access

- A package of data elements, guidelines, and instructions for creating library and cultural heritage metadata that are well-formed according to international models. These metadata are intended to support the discovery and identification of resources in library and other cultural heritage collections.
- An implementation and refinement of
 - The IFLA Functional Requirements Models – original RDA
 - The IFLA Library Reference Model (LRM) – beta RDA

What is RDA?

RDA Toolkit

- An integrated, browser-based, online product that provides guidelines and instructions about the user-focused entities, elements, and vocabulary encoding schemes intended for an agent who creates metadata
 - Includes RDA, and other cataloging-related documents and resources

RDA Registry

- Provides documentation about the RDA entities, elements, and vocabulary encoding schemes for application developers and linked data communities
- Includes representations of the RDA element sets and value vocabularies in the Resource Description Framework (RDF), the syntax of open linked data and the semantic web

Scope of RDA



In scope

- “Things” of bibliographic interest
- Data and functionality required by end-users to meet their information needs


Out of scope

- Administrative metadata
- Resource management metadata (e.g., acquisitions, preservation, circulation)
- Rights management metadata
- Subject access beyond RDA entities

RDA Timeline

2003-2009	RDA developed, envisioned primarily as an e-resource <ul style="list-style-type: none"> Content based on both AACR2 & IFLA's Functional Requirements models (FRBR, FRAD, FRSAD)
2010	RDA first published <ul style="list-style-type: none"> E-resource  • Print 
2011-2017	Annual <i>updates</i> to English RDA published in the e-resource Toolkit <ul style="list-style-type: none"> Supplemented by quarterly <i>releases</i> which contained editorial changes
2011	First RDA vocabularies published in the Open Metadata Registry
2013	<ul style="list-style-type: none"> New print RDA published, incorporating changes to date Many U.S. libraries start using RDA for original cataloging
2014	<ul style="list-style-type: none"> RDA Registry launched: https://www.rdaregistry.info/ First RDA translations published (French and German)

RDA Timeline

2016	Worldwide review of IFLA Library Reference Model (LRM) <ul style="list-style-type: none"> • Consolidated and updated the three Functional Requirements models, which underlie RDA
2016-present	<u>R</u> DA Toolkit <u>R</u> estructure and <u>R</u> edesign Project (3R Project) <ul style="list-style-type: none"> • Enhancement of Toolkit structure • Improvements to cataloger user experience • Implementation of LRM entities and “world view”
2017	<ul style="list-style-type: none"> • Original Toolkit content frozen • IFLA approves and publishes LRM
2018 June	Beta version of new Toolkit released <ul style="list-style-type: none"> • Accessible to current subscribers 
2018 July	YouTube channel created for RDA/RDA Toolkit videos: https://www.youtube.com/channel/UCd5pa3AoQlr17wESE9YHcnw

RDA Timeline

<i>2018 June- 2019 March</i>	Continued revisions to the beta Toolkit <ul style="list-style-type: none">• New content & new design features
<i>2019 April</i>	Beta Toolkit enters stabilization phase for English text <ul style="list-style-type: none">• New phase of the 3R Project – more responsibility on regions/communities• Toolkit navigation and functionality enhanced
<i>2019 April- present</i>	Translation work underway, starting with RDA Vocabularies <ul style="list-style-type: none">• Translators trained on Trados
<i>2019 July- Aug.</i>	Orientation webinars offered in English <ul style="list-style-type: none">• In two series: New Concepts and Special Topics
<i>2019 Sept.</i>	Update to beta Toolkit <ul style="list-style-type: none">• Resumed tracking of editorial changes
<i>2020 Dec. (PLANNED)</i>	Making the beta Toolkit the official version of RDA

3R Project Goals

- Implement IFLA LRM entities
 - *New*: Agent, Collective agent, Nomen, Place, Timespan
 - *Revised*: Person
- Retain current RDA elements unless they conflict with LRM
 - Redundant elements will be removed after sometime after 3R Project ends
 - Unstructured description of an element (e.g., *type of recording*) preferred over old “details of” approach (e.g., *details of type of recording*)
- Generalize the instructions
- Offer more flexibility in choosing how to record a piece of information

3R Project Goals

- Develop a new approach to relationship designators
- Promote even greater international adoption of RDA
 - Original Toolkit available in 8 languages
 - RDA vocabularies (in whole or in part) available in over 20 languages now
- Better position RDA for use in linked data applications
- Improve the Toolkit interface and address long-standing problems
- Restructure the underlying data
 - Provide efficient and reliable work processes and tools for RDA editors and translators

What “Stabilization” means

- As of April 2019, the RDA beta site is no longer under constant revision
 - English language text stable for
 - Value vocabularies
 - Element sets
 - Entity and element chapters
 - Guidance and resource chapters
 - Will serve as baseline text for
 - Translators
 - Policy statement writers
 - Application profile developers
 - Writers of supplementary materials
 - RDA Examples Editor

Stable, but not unchanging

- English content
 - 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

Stable, but not unchanging

- More releases to the beta Toolkit coming
 - Improvements/additions to the Toolkit interface
 - Changes identified in Release notes
 - Next release anticipated for January 2020
- Addition of translations & policy statements
 - Will be published as soon as they are ready

Stabilization ≠ Official

- Stabilization ***does not*** mean starting the countdown clock on the original Toolkit



Becoming Official

- The official “switch over” date for the beta Toolkit is planned for 15 Dec. 2020
 - beta.rdatoolkit.org → access.rdatoolkit.org
 - Original Toolkit will become available at: original.rdatoolkit.org
 - The countdown clock **will not** start on this date either
- Major changes to the (English) RDA text may again be considered and implemented
 - Based on formal proposals from
 - RDA regions
 - RSC working groups
 - Other RDA users

Countdown Clock Questions

- Why delay starting the clock?
 - Need to offer flexibility to communities/agencies completing translations, policy statements, and application profiles
 - Allows for for cataloging agencies to pace their transition from the original Toolkit to the official Toolkit
 - Develop and conduct cataloger training
- When will it start?
 - Only after the RDA Board and the RSC agree on a date
- How long will the clock run?
 - One year
 - Time left will display prominently on original.rdatoolkit.org site

Working with the Beta Toolkit

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Organization of the Toolkit

- Guidance Chapters

- Background information
- Explanations of new concepts
- General information
 - Stated once
 - Referred to as needed from other chapters

- Entity Chapters

- One for each of RDA's 13 entities
- Contain links to the related elements
- RDA entity is the super-type for the other 12 entities

Organization of the Toolkit

- Element Chapters

- Thousands of separate elements, all with a standard structure
 - Element reference
 - Includes domain/range, alternate labels, and MARC mappings
 - Prerecording – [Is this the element to use for my data?](#)
 - Recording – [What data do I choose to record?](#)
 - Recording methods – [How do I record the data?](#)
 - ◆ Sections for unstructured description, structured description, identifier, and IRI
 - Related elements

Organization of the Toolkit

- Resources

- Supplemental information that is part of RDA itself
 - Glossary
 - Vocabulary Encoding Schemes
 - Relationship Matrix [under development]
 - Guidance for specific options and situations, including
 - Capitalization
 - Initial articles
- Supplemental information for specific communities or language groups
 - Revision history
 - Books of the Bible
 - Terms for medium of performance
- AACR2

Guidance in Different Places

- Person

Appellation elements

- 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

- Person

Appellation elements - inverses

- appellation of person of
- name of person of
- preferred name of person of
- variant name of person of
- access point for person of
- authorized access point for person of
- variant access point for person of
- identifier for person of

Guidance in Different Places

- Guidance:
 - Application profiles
 - Recording methods
 - Transcription guidelines
 - Data provenance
- Resources:
 - Additional instructions on names of persons
 - Terms of rank
- Entities: Nomen
 - nomen string
 - equivalent to
- Entities: Person
 - surname
 - given name
 - term of rank, honour, or office
 - period of activity of person
 - date of birth
 - date of death
 - fuller form of name
 - profession or occupation
 - real identity of person

Guidance in Different Places

- Outside of "RDA proper" – but integrated into the Toolkit?
 - Application profiles
 - Developed by experts at the regional/community level
 - Specify the metadata to be captured
 - Includes the entities, elements, and vocabulary encoding schemes (controlled vocabularies) or string encoding schemes to be used
 - Identifies mandatory elements and repeatable status of those elements
 - May include preferred recording method(s)
 - May be supplemented by more local application profiles
 - Policy statements
 - Developed by experts at the regional/community level

Conditions/Options

Condition/Option Boxes

- Replace the original Toolkit's
 - Optional addition
 - Optional omission
 - Exception
 - Alternative
- Appear when the instruction has at least one condition
 - Option is to apply the instruction
 - The same set of conditions may lead to different options
- Application profiles/policy statements will help catalogers know which options to follow

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

Titles proper of manifestations of parts and iterations

CONDITION

A manifestation is a part of a manifestation that is issued in two or more units.

A manifestation is issued in two or more units in a container.


OPTION

Record a value that is found on a container.

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](#) .

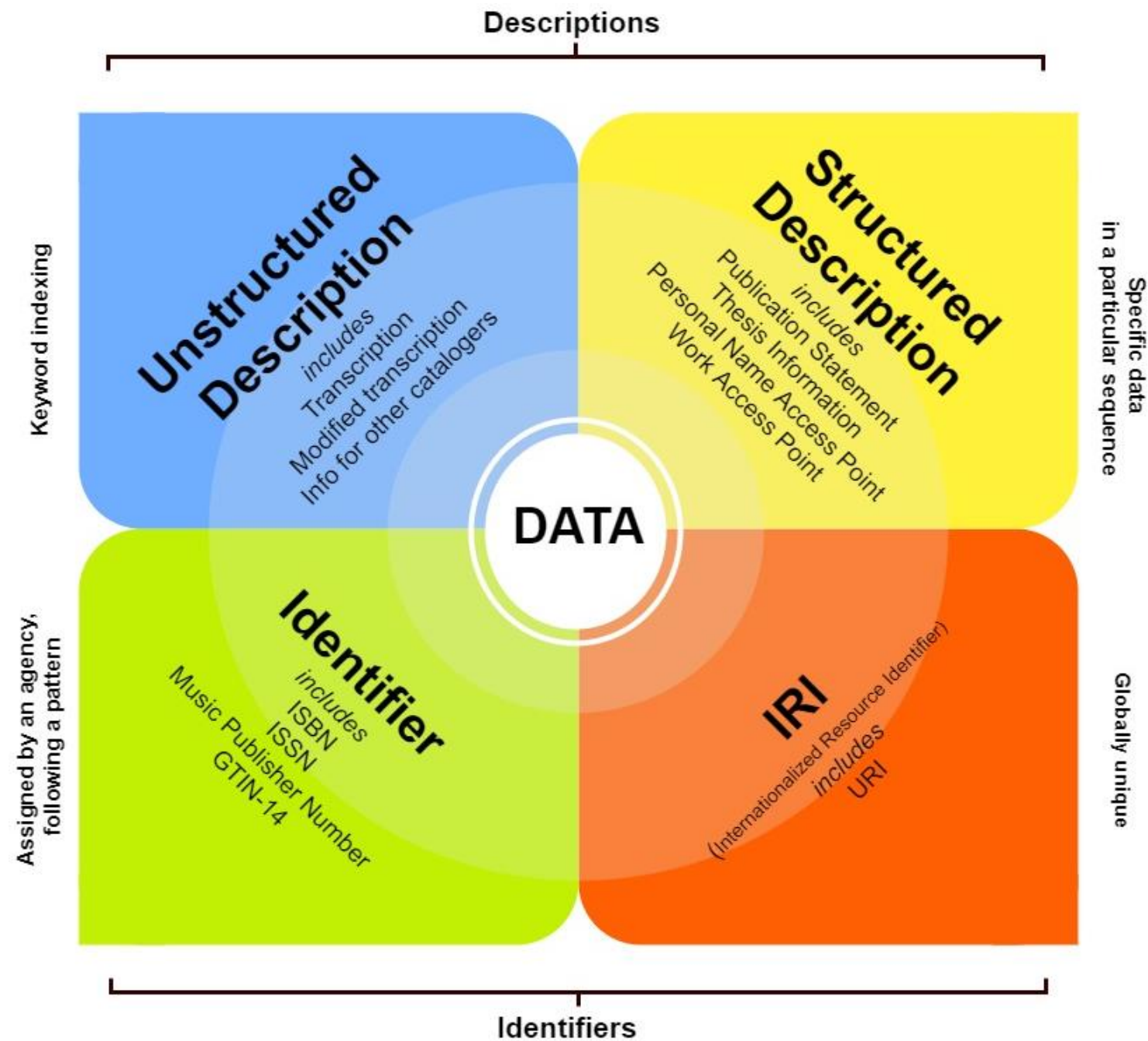
OPTION

Record a Manifestation: [note on manifestation](#)  on the source or basis for a value of a title proper.

Recording Methods

Four Recording Methods

- Present (in part) in original Toolkit
 - RDA 25.1.1.3 example box labels
 - Identifier for the related work
 - Authorized access point representing the related work
 - Structured description of the related work
 - Unstructured description of the related work
- In Beta Toolkit, element chapters present up to four methods for capturing data
 - Can use more than one



Example: place of capture

Entities > Expression > place of capture

place of capture

Definition and Scope

A place that is associated with recording, filming, etc., the content of an expression.

 Element Reference

Prerecording

The value of this element may be used for Work: [place of capture of representative expression](#).

Recording

Record this element as a value of Place: [appellation of place](#) or as an IRI.

OPTION

Record a *place of capture* by naming the specific studio, concert hall, etc., if applicable and readily ascertained, and the city, etc.

Recording an unstructured description

Record an unstructured description for a related place as a value of Place: [name of place](#).

For general guidance on unstructured descriptions, see Recording methods. [Recording an unstructured description](#).

Recording a structured description

Record a structured description for a related place as a value of Place: [access point for place](#).

For general guidance on structured descriptions, see Recording methods. [Recording a structured description](#).

Recording an identifier

Record an identifier for a related place as a value of Place: [identifier for place](#).

For general guidance on identifiers, see Recording methods. [Recording an identifier](#).

Recording an IRI

Record an IRI for a related place as a real-world object.

For general guidance on IRIs, see Recording methods. [Recording an IRI](#).

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Recording Methods Example

- Unstructured description [transcribed from manifestation]:
Santiago de Chile
- Structured description [Authorized Access Point in LC/NACO Authority File]:
Santiago (Chile)
- Identifier [from Getty Thesaurus of Geographic Names]:
7002591
- IRI [from DBPedia]:
<http://dbpedia.org/resource/Santiago>




Relationships: From Designators to Elements

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Relationships: A New Approach

- Relationship *elements*, not “relationship designators” as in original Toolkit
 - New way to think about these
 - Inherently reciprocal – inverses formally declared and have their own element chapters
 - *Example:*
 - [place of birth](#): A place where a person was born.
 - [place of birth of](#): A person who was born in a place.
- Beta Toolkit Relationship Matrix [under development] will be one way of navigating to specific instructions


Relationships vs. Attributes

- Relationships have a domain **and** a range
 - Relate two elements to each other
 - Domain: Entity that is described by an element
 - Range: Entity that is the value of a relationship element
 - Available in  Element Reference for each element
 - Example: [employer](#): A corporate body who employs a person.
- Attributes only have a domain
 - Characteristics of an entity
 - Example: [playing speed](#): A speed at which an audio carrier must be operated to produce the sound intended.

Domain

Person 

Range

Corporate Body 

Domain

Manifestation 

Alternate labels

has playing speed



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>

Muchas Gracias!

Questions?

Ask now, or email me later at:
RSCChair@rdatoolkit.org

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