RDA Beta Toolkit: Present and Future

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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

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003-2009</td>
<td>RDA developed, envisioned primarily as an e-resource</td>
</tr>
<tr>
<td></td>
<td>• Content based on both AACR2 &amp; IFLA’s Functional Requirements models</td>
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<tr>
<td></td>
<td>(FRBR, FRAD, FRSAD)</td>
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<tr>
<td>2010</td>
<td>RDA first published</td>
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<tr>
<td></td>
<td>• E-resource</td>
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<td></td>
<td>• Print</td>
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<tr>
<td>2011-2017</td>
<td>Annual updates to English RDA published in the e-resource Toolkit</td>
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<tr>
<td></td>
<td>• Supplemented by quarterly releases which contained editorial changes</td>
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<tr>
<td>2011</td>
<td>First RDA vocabularies published in the Open Metadata Registry</td>
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<tr>
<td>2013</td>
<td>• New print RDA published, incorporating changes to date</td>
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<tr>
<td></td>
<td>• Many U.S. libraries start using RDA for original cataloging</td>
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<tr>
<td>2014</td>
<td>• RDA Registry launched: <a href="https://www.rdaregistry.info/">https://www.rdaregistry.info/</a></td>
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<tr>
<td></td>
<td>• First RDA translations published (French and German)</td>
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| 2016 | Worldwide review of IFLA Library Reference Model (LRM)  
  • Consolidated and updated the three Functional Requirements models, which underlie RDA |
| 2016-present | RDA Toolkit Restructure and Redesign Project (3R Project)  
  • Enhancement of Toolkit structure  
  • Improvements to cataloger user experience  
  • Implementation of LRM entities and “world view” |
| 2017 |  
  • Original Toolkit content frozen  
  • IFLA approves and publishes LRM |
| 2018 June | Beta version of new Toolkit released  
  • Accessible to current subscribers |
| 2018 July | YouTube channel created for RDA/RDA Toolkit videos:  
  [https://www.youtube.com/channel/UCd5pa3AoQIr17wESE9YHcnw](https://www.youtube.com/channel/UCd5pa3AoQIr17wESE9YHcnw) |
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| 2018 June-2019 March  | Continued revisions to the beta Toolkit  
  * New content & new design features                                           |
| 2019 April            | Beta Toolkit enters stabilization phase for English text  
  * New phase of the 3R Project – more responsibility on regions/communities  
  * Toolkit navigation and functionality enhanced                                 |
| 2019 April-present    | Translation work underway, starting with RDA Vocabularies  
  * Translators trained on Trados                                                   |
| 2019 July-Aug.        | Orientation webinars offered in English  
  * In two series: New Concepts and Special Topics                                     |
| 2019 Sept.            | Update to beta Toolkit  
  * Resumed tracking of editorial changes                                             |
| 2020 Dec. (PLANNED)   | 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
    o 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
    o Value vocabularies
    o Element sets
    o Entity and element chapters
    o Guidance and resource chapters
  ▪ Will serve as baseline text for
    o Translators
    o Policy statement writers
    o Application profile developers
    o Writers of supplementary materials
    o RDA Examples Editor
Stable, but not unchanging

• English content
  ▪ May still modify RDA in the following categories
    o Minor editorial changes
      • Correction of typos and obvious errors
      • Edits to improve consistency
      • Better wording to support translations
    o 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
    o 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
    o RDA regions
    o RSC working groups
    o 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 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
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
    o Element reference
      • Includes domain/range, alternate labels, and MARC mappings
    o Prerecording – Is this the element to use for my data?
    o 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
    o Related elements
Organization of the Toolkit

• Resources
  ▪ Supplemental information that is part of RDA itself
    o Glossary
    o Vocabulary Encoding Schemes
    o Relationship Matrix [under development]
    o Guidance for specific options and situations, including
      • Capitalization
      • Initial articles
  ▪ Supplemental information for specific communities or language groups
    o Revision history
    o Books of the Bible
    o 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
    o Developed by experts at the regional/community level
    o 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)
    o May be supplemented by more local application profiles
  ▪ Policy statements
    o 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

place of capture

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

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.

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.
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
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.
For More Information
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.rdata_toolkit.org
  ▪ 3R Project updates: https://www.rdata_toolkit.org/3RProject

• Beta Toolkit:
  https://beta.rdata_toolkit.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@rdataoolkit.org