

RDA Toolkit – Built for Today and Tomorrow

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Outline

- Original Toolkit
- The 3R Project
- Official RDA Toolkit
- Translation Support
- Future Development

Original RDA Toolkit

- Debuted in 2010
- Succeeded Anglo-American Cataloging Rules, 2nd Edition
- IFLA's Functional Requirements for Bibliographic Records (FRBR) served as the conceptual model
- Designed to support a range of cataloging environments from card catalogs to linked data
- Laid foundation for internationalization of the standard
- Like AACR2, RDA was structured as a cataloging manual, tied closely to traditional Anglo-American cataloging practices
- Introduced a Spanish language translation in 2015
- The translation has not been updated since 2017

3R Project

- The RDA Toolkit Restructure and Redesign Project began in 2017.
- 3R Project Goals:
 - align the standard with IFLA's Library Reference Model (LRM)
 - address cultural bias in RDA that was inherited from AACR2
 - improve Toolkit support for expanding multilingual content
 - assure that Toolkit is compliant with accessibility standards
 - install a robust and flexible architecture to Toolkit database
 - optimize Toolkit for linked data environments while maintaining support for traditional environments
- Beta Toolkit appeared in 2018.
- 3R Project concluded in December 2020 when the beta site became the official version of RDA Toolkit.

Official RDA Toolkit

The rebuilt Toolkit is no longer organized as a manual. It is more of a data dictionary. There are four tabs.

- Entities
- Guidance
- Policies
- Resources

Entities

Includes the 12 LRM entities*

- WEMI
- Agent entities
- Other

*and 1 supertype



Entities

- Each entity includes access to its related elements.
- There are two types of elements.
 - Relationship – an element that describes a relationship between two separate entities
 - Attribute – an element that describes a specific characteristic of an entity
- Elements are organized alphabetically.

Entities and Elements

All entity and element pages have the following page structure

- Entity/Element name
- Definition and Scope
- Element Reference (elements only)
- Prerecording (provides guidance on necessary considerations before using entity/element)
- Recording (Unstructured, Structured, Identifier and IRI)
- Elements/Related elements

The Other Tabs

- **Guidance** – information on core RDA concepts and practices. These pages clarify and supplement RDA instructions
- **Policies** – full text of Policy Statement sets
- **Resources** – RDA Glossary and Vocabulary encoding schemes, as well as Community Resources, and Revision History

Key Features of Official RDA

Option/Condition Options

- Many more options in RDA Toolkit
- Intended to support local practices
- Condition and Condition Options are If-Then constructions
- Implied options in RDA include choosing which elements to use of which recording methods to apply

Entities > Expression > access point for expression

access point for expression

Format of base access points for expression

OPTION

Record a title in direct order with no amendments.

CONDITION

A value of a title includes separate words, phrases, or other components.

CONDITION OPTION

Record a value that rotates one or more words, phrases, or other components of a title to the front, followed by some or all of the remainder of the title.

Key Features of Official RDA

Integrated Policy Statements (PS)

- PS display alongside of instructions
- No need to click away from RDA content
- Links can be previewed in this space as well

The screenshot displays RDA content with integrated Policy Statements (PS). On the left, two grey boxes labeled 'OPTION' provide instructions for recording a vocabulary encoding scheme and a string encoding scheme. On the right, two 'BL' (British Library) PS boxes are shown, each with a 'Send to Back' button. A red arrow points from the first PS box to the first 'BL' box, and another red arrow points from the second 'BL' box to the second PS box. Below these, a section titled 'Recording an Identifier' includes instructions and a yellow double-headed arrow pointing to a 'Recording an Identifier' link. A preview window titled 'Recording methods' is open, showing 'Recording an Identifier' and a list of identifier types: an identifier assigned by an independent external agent, an identifier assigned by a local agent, and a variation for a resource taken from a...

OPTION
Record a vocabulary encoding scheme that is used as a source of information. For general guidance, see [Guidance: Data provenance](#). [Recording a source of metadata](#).

OPTION
Record a string encoding scheme that is used to construct an access point. For general guidance, see [Guidance: Data provenance](#). [Recording a content standard used for metadata](#).

Recording an Identifier
Record an identifier that is a stringified IRI for an instance of a [Nomen](#).

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

Recording an IRI
Record an IRI for an instance of a [Nomen](#) as a real-world object.

Do not record an IRI for the entity that is being described.

A nomen references the Nomen: [nomen string](#) that is the value of an appellation

BL Send to Back
British Library: Apply.

BL Send to Back
British Library: Apply.

Recording methods X
Recording an Identifier
Kinds of identifier include:

- an identifier assigned by an independent, external agent
- an identifier assigned by a local agent
- a variation for a resource taken from a

Key Features of Official RDA

Community Contributions

- **HTML Editor** – allows for private, local, global and public sharing
- **Community Resources** – area that collects practice documents that are essential to specific communities (under development)

[Modern Theories of drama](#)

Institution: VKM

Workflow

[Subscribe to Document](#) | [Subscribe to Institution](#)

[Moreh Nevuchim](#)

Institution: The National Library of Israel

LocalPolicy

[Subscribe to Document](#) | [Subscribe to Institution](#)

[NLNZ guidance](#)

Institution: National Library of New Zealand

LocalPolicy

[Subscribe to Document](#) | [Subscribe to Institution](#)

[Perfil d'aplicació PDI UIB \(work in progress\)](#)

Institution: Universitat de les Illes Balears

ApplicationProfile

[Subscribe to Document](#) | [Subscribe to Institution](#)

R | D | A

Resource Description & Access

Official RDA Toolkit - Impact

- **Choices** – options (both stated and implied) need to be addressed
- **Application Profiles** – communities need to lay out the preferred RDA practice and share that through an application profile, whether in the Toolkit or outside of it; examples include British Library PS, DACH manual, or RDA Toolkit contributed document
- **Original RDA Toolkit** – It will come down in 2027

RDA Translations

The 3R Project required a complete revision for translation. This also included a revision of the translation process. The RDA process involves the use of spreadsheets, Trados translation software, and the RDA content management system (CMS). RDA translation requires the following steps

- 1. Reference Translation** – RDA Reference includes entities and elements, their definitions and notes, and RDA vocabularies. There are over 3000 elements. This is the most challenging of the translation steps and takes the longest time. This step is completed using a spreadsheet template.

RDA Translations, continued

- 2. User Interface and Translation Table** – this step translates the Toolkit interface and the common headings used in the element pages and elsewhere in the Toolkit.
- 3. Boilerplate Translation** – this is a large single file that contains text passages that are repeated throughout the RDA standard. This translation is done using Trados.
- 4. Operational Script** – This script pulls the reference translation content into the entity/element files. Combined with the work from steps 2 and 3, this script effectively completes approximately 70% of RDA files.

RDA Translations, continued

- 5. Trados Translation** – the remaining entity and element files and all the guidance files will have to be processed in the Trados software form translation.
- 6. Examples Translation**– this is new area of translation and do not have to be a translation. Language groups may create their own examples.
- 7. Optional Translations**– translators may choose to translate the Help and Revision History sections of the Toolkit.

Future Development

- RDA Copyright Holders seek to continually improve the utility of the Toolkit for its users.
- We rely heavily on feedback from users to inspire improvements to the Toolkit.
[www.rdatoolkit.org/RDA feedback](http://www.rdatoolkit.org/RDA_feedback)
- There are a range of short and long-term improvements that are in development.
- Recently, locked title bars were added to the Toolkit so that users can better track their location in the text and easily change the PS display.

Community Resources

- One upcoming improvement will be the Community Resources (CR) area found on the Resources tab.
- This space currently holds legacy Anglo-American instructions that have been removed from official RDA but are very useful to catalogers in that community.
- The CR space will be expanded to approved contributors to add documents that are needed by other identifiable communities.
- Translation and PS groups can add such documents through the Toolkit CMS.
- Approved users can also add documents to this area using the Toolkit HTML editor

Expansion of Examples

- The RSC has heard from users that there is a need for many more examples in the Toolkit.
- A new Examples Working Group has been established to increase production of examples.
- We will also develop an online form to allow anyone to submit a new example for consideration of inclusion.
- Infrastructure is being added to allow translation teams to create new examples for inclusion in the and the option to drop standing English language examples for their translations.

Final Thoughts

The success of RDA as an international standard is dependent on ...

- growing participation in RDA governance,
- input from all communities to improve both the RDA standard and the functionality of RDA Toolkit,
- and the construction of a network of experts across the globe that support RDA education and training.



Thank you

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