A decorative graphic on the left side of the slide, featuring a large, stylized 'L' shape. The top horizontal bar is blue, and the vertical bar is dark grey. The 'L' is composed of multiple parallel lines, creating a sense of depth and movement.

Update on 3R Project

(RDA Toolkit Restructure and Redesign Project)

James Hennelly, Director, RDA Toolkit
Judith Kuhagen, 3R Project Consultant

RDA Forum – ALA Annual Conference – June 24, 2017

Why?

- Restructuring of RDA as part of implementing the IFLA Library Reference Model (LRM)
 - Consolidation of FRBR, FRAD, and FRSAD conceptual models
- Clear need for a redesign of Toolkit and workflow processes
 - Time for better, smarter design
 - With more translations and policy statements to come, the current data structure is not sustainable
 - Current tools and practices are inefficient and unreliable

Goals of 3R Project

Significantly improve RDA and RDA Toolkit in order to...

- better meet the needs of users and be a more productive part of their work
- add greater flexibility and utility to the Toolkit's display of instructions and RDA-related documents
- provide efficient and reliable work processes and tools for authoring groups

Three areas by three groups

- Restructure of data and work processes (Dakota Systems)
- Redesign of Toolkit and user experience (GVPI)
- RDA and RDA Reference content (RSC)

Restructure of data and work processes

- RDA repository
 - DITA conversion
 - Chunking of data
 - New/different metadata for searching
- New mapping solution
- New revision history solution
- Trados software

Redesign of Toolkit and user experience

- Responsive design
- W3C's Web Content Accessibility Guidelines
- Entity view navigation and display
- Toolkit navigation
- Search (including current instruction numbers)

Redesign of Toolkit and user experience

- Update user content (workflows) creation tools
- New instruction views based on special areas (e.g. music, rare materials)
- Display of glossary definitions, examples, policy statements, revision history, bookmarks, etc.

Profiles

- Account profiles are likely to be required
- Personal profiles are strongly recommended
- Improvements to Admin site to allow for easy management of profiles

Transitioning to the 3R Toolkit

- Current site will remain accessible through April 2019
- Free online Toolkit training presentations (both live and recorded) will be available

RDA and RDA Reference content -- changes

- 1) Make revisions and additions to implement LRM
- 2) Extend “4-Fold Path” for data capture and format
- 3) Expand RDA Element Set and improve display of content in the Entity View

Some changes already made in Toolkit: August 2016-April 2017

- Synchronization between Open Metadata Registry (OMR) and Toolkit supplies content in RDA Toolkit:
 - Glossary
 - “Scope” instructions
 - Appendices I-K
 - Controlled vocabulary lists

Other changes already made in Toolkit: August 2016-April 2017

- To introduce LRM “agent” terminology:
 - Replacing “person, family, and corporate body” with “agent”
- To clarify entity being discussed:
 - Replacing “resource” with specific entity in the WEMI stack (kept “integrating resource,” “digital resources”, etc.)

Other pre-project changes: articles

- In instructions, referring to elements with indefinite, rather than definite, article – because different communities may make different choices
 - e.g., a title proper, rather than the title proper; a preferred name for person, rather than the preferred name ...
- Deleting articles within English names of elements although may be retained in translations
 - e.g., identifier for ~~the~~ work, language of ~~the~~ family

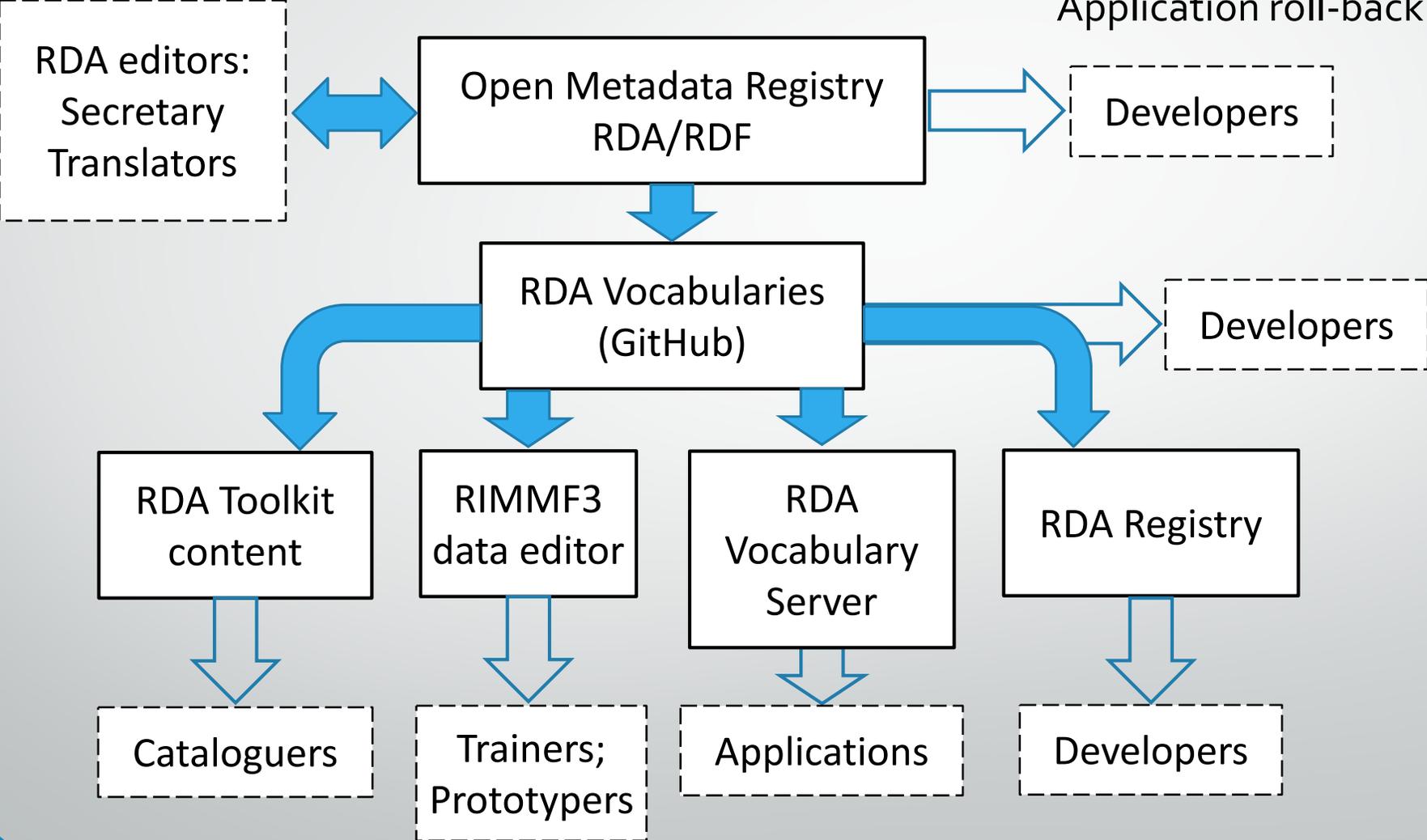
RDA changes in Open Metadata Registry

- What is OMR?
 - An open system registry used by 180+ organizations and individuals to store linked data: element/property sets, vocabularies, and application profiles
 - Managed by Metadata Management Associates
- Who makes changes for RDA?
 - RSC Chair and RSC Secretary, 3R Project Consultant, translators
- Why?
 - So content needs to be edited only once
 - So content is available beyond the RDA Toolkit at no cost

RDA Reference: data maintenance

Entities, element sets, value vocabularies

Atomic audit trail
Deprecation policy
Semantic versioning:
Application roll-back



Library Reference Model (LRM)

- Simpler conceptual model than former Functional Requirements models, allowing those implementing LRM to develop extensions of the model
- LRM and three explanatory documents available on IFLA Cataloguing Section page:
<https://www.ifla.org/publications/node/11412>

Implementing Library Reference Model (LRM)

- LRM entity “Res” not likely to be implemented in RDA: adding “RDA Entity” instead as the high-level entity
- New LRM entities being added to RDA :
 - Nomen
 - Agent
 - Collective agent
 - Place
 - Time-span

Existing RDA entities

- All existing RDA entities -- except Person -- are compatible refinements of LRM
- Person not compatible because LRM excludes non-humans; but:
 - RDA will include possibility of access to the non-human name present on manifestations as the represented name of creator

4-fold path

1. Unstructured description (e.g., a transcription, a free text note) [string]
 2. Structured description (e.g., an access point, a preferred label from a vocabulary encoding scheme) [string]
 3. Identifier (i.e., a human-readable string but not necessarily language-based, e.g., ISBN, ISNI) [string]
 4. IRI for the entity for linked data applications [thing]
- Some paths in RDA now for some elements; extend to all elements although some paths may not apply to some elements

Other additional elements for RDA

- Attributes of new LRM entities (agent, collective agent, nomen, place, time-span): e.g., name of agent, identifier for collective agent
- New elements in LRM: e.g., intended audience of expression
- “Missing elements” now implied in RDA: e.g., thematic index number, fingerprint

More additional elements

- Elements for unmediated transcription (WYSIWYG) for machine processing: e.g., manifestation statement
 - New RDA basic transcription rules for these elements
- Relationships are elements and vice versa
- Possibility (not yet confirmed by RSC) of elements for access points, authorized access points, and variant access points
- Also not yet decided: whether to label some elements as core or leave that decision to cataloging agencies/communities

Likely structure of RDA content in the Toolkit

- Order of chapters
 - General chapters: e.g., Aggregates, Basis of description, 4-fold path
 - Entity chapters
- Two views of RDA content
 - Entity set view (in Toolkit now called “RDA: Element Set”) – with more graphical display
 - Instruction view: not in workflow order but more as a “data dictionary”

A “chunk” for each element’s instructions

- Some content supplied from OMR:
 - Definitions, scope statements, value vocabularies
 - Perhaps also user tasks and sources of information
- Consistent wording in “Recording” instructions, etc., to make editing and translating easier and more efficient
 - And you won’t have to wonder if slightly different wording means something different!
- New numbering system not yet determined

Possible structure of each “chunk”

- Definition and scope statement
- User tasks
- Sources
- 4-fold path
- Provenance
- Recording
- Links to related elements (both more general and more specific)
- Links to topics in general chapters

Changes for examples

- Each of the 4-fold paths as appropriate
- Showing the relationship
- More context for individual elements
- Improved display but specific style of display not yet decided
- Ability to set preferences
 - For seeing/not seeing examples
 - For types of examples

Possible example: view as any or all of the appropriate 4-fold paths

Element: language of person

- * As an unstructured description: “The author writes in English”
- * As a structured description: “English”
- * As an identifier: “eng”
- ^ As an IRI: <http://id.loc.gov/vocabulary/languages/eng>

* = a string; ^ = a thing

Possible example: view as relationship

Alice Munro *has language of person* **English**

<http://viaf.org/viaf/68944521>

<http://rdaregistry.info/Elements/a/P50102>

<http://id.loc.gov/vocabulary/languages/eng>

Possible example: view in context

Person

has identifier VIAF ID 68944521

has preferred name for person Munro, Alice

has date of birth 1931

has language of person English

has country associated with person Canada

is author of Lives of girls and women

is author of Runaway

For more info ...

- Open Metadata Registry: <http://metadataregistry.org/>
- RDA Vocabularies (GitHub): <https://github.com/RDARegistry/RDA-Vocabularies>
- RDA Registry: <http://www.rdaregistry.info/#>
- RDA Toolkit website: <http://www.rdatoolkit.org/>
- RDA Steering Committee website: <http://rda-rsc.org/>

jhennelly@rdatoolkit.org
3Reditor@rdatoolkit.org