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ALA
GETTING A HANDLE ON THE NEW RDA TOOLKIT
MAY 10, 2019

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>> DAN FREEMAN: Hi everybody, this is Dan Freeman from ALA
Publishing. We are 20 minutes from the start of our event, this
is an audio check. We will be broadcasting silence between
these audio checks, and we want to encourage you to use the chat
space to say hello, introduce yourself, let us know where you
are and where you are from, and anything you want to share. We
will begin in about 20 minutes. Thanks.

Hi everybody, this is Dan Freeman from ALA Publishing. We are
15 minutes away from our event start time. Just coming in,
doing an audio check and letting you know we will be doing these
audio checks about every five minutes until we begin. In the
meantime, we want to encourage everybody here to use the chat
space to introduce yourself. Let us know who you are, where you
are, and anything else you want to share. We will begin soon.
Thanks, goodbye.

Hi everyone, this is Dan Freeman from ALA Publishing just coming
in with a sound check. We are about 10 minutes from our event
start time, so we will be doing a couple more sound checks
before we begin. We've got a big audience today so hopefully we
can make this event as interactive as possible. We want to
encourage everyone to do what many of you have already done, use
the chat space to say hello, introduce yourself, let us know who
you are and where you are from and anything else you want to
share. We will be starting in about 10 minutes. Thanks.

Hi everybody, this is Dan Freeman from ALA Publishing. Just
coming in to do a quick audio check. We are about five minutes

away from our event start time. I will do one more audio check
before we officially begin. In the meantime, I just want to
encourage all of you to use the chat space to introduce
yourself, let us know who you are, where you are, anything else
you want to share. And we will begin soon. Thanks.

Hi everyone, this is Dan Freeman from ALA Publishing. This is
our final audio check. We will begin in about two minutes. In
the meantime, if you haven't already introduced yourself, please
feel free to use the chat space to share who you are and
anything about yourself you would like to share. Thanks.

Hi everybody, welcome. This is Dan Freeman from ALA Publishing
and I'm happy to welcome you to Getting a Handle on the New RDA
Toolkit with Kathy Glennan and James Hennelly. We have a great
workshop lined up for you today and I know you are eager for us
to get to the content. I'm just going to do a very quick
technical overview; I promise I will keep it quite short. This
will help things run more smoothly today.

The first thing I want to point out is that the chat spaces on
the lower right-hand corner of your screen. We encourage you to
use that chat space to the maximum extent possible. These
events are always better when they are more interactive. So if
you want to start by introducing yourself, a lot of you already
have, that would be fantastic. There is no question or comment
too big or too small for the chat space.

We are also providing captions today. If you need caption they
are available in the lower right-hand corner, you may see a
message warning you about an external site. It is a safe site
so you can go ahead and click 'continue button.

If you need help please click on the tool pulldown window above
the chat space and the private chat user house. Our host will
be able to provide you troubleshooting. Do better with us
because it looks like we are going to have more than 800 people
today.

We will be doing a Q&A session at the end, but you do not need
to hold your questions for the end of the event. You can type
them into the chat space, and we will do our best to relay them
to our presenters after the presentation.

Keep in mind with a number of people we've got here today we
will probably not get to every single question that gets asked.
We will certainly do our best though.

If you are having problems with the audio you can usually resolve those by mousing over the top of your screen and clicking communicate and audio connection. That is where you will find the option to call in with your phone if you would like to do that. Or to disconnect and reconnect your audio broadcast.

If you were streaming the audio through your commuter and you find your audio decreasing usually disconnecting and reconnecting will take care of that, and you can do that by pulling up that communicate audio window, disconnecting and reconnecting.

If you hear an echo you've probably got two broadcast windows open simultaneously. If you close one of those it should go away right away.

We are recording today's event, we will send you an email within the next 24 hours which gives you full access to the recording in the slides, so if you have to leave early or you miss something you will get access to the recording.

I would like to introduce Kathy Glennan it was the chair of the RDA Steering Committee, and James Hennelly who is the director of RDA Toolkit. And with that I am going to turn things over to them. Jamie, Kathy, welcome.

>> KATHY GLENNAN: Thank you.

>> JAMES HENNELLY: Hello. Kathy is going to start us off I think.

>> KATHY GLENNAN: There we are. I want to thank all of you for your interest in today's webinar. I am Kathy Glennan, chair of the RDA Steering Committee and head of the collections and cataloging at the University of Maryland.

This is a broad outline of what James Hennelly and I are going to be talking about today. First of all, stabilization of the English text in the Toolkit, and then an overview of new concepts, all concepts rethought, and a summary of what is the same or similar.

And then I get off the hot seat and James will take over from there.

Let's dive right into stabilization. What are we talking about here? This is a new phase of the 3R project, something we have been doing for many years now, the RDA restructuring and redesign project. This new phase was effective April 30 with the rollout of the latest update to the Toolkit.

The beta site now is no longer under continuous revision, and that means we will start documenting and publicizing changes again as opposed to doing it as part of a project with the Toolkit.

However, the way we will document and publicize changes will be in a somewhat different form than what you are used to in the original Toolkit, and that is partly because we are not going to keep entire snapshots of old versions of the instructions.

The English language text is stable for value vocabularies, element sets, entity and element chapters, guidance and resource chapters. So not just the Toolkit but actually things in the RDA registry.

Ultimately this will serve as a baseline text for the next phase which has to do with getting the translations done, policy statements written, application profiles developed, and anyone who wants to develop supplementary monographs or other guidance to RDA. The text is now considered stable enough for these people to start doing their work.

While it's stable it is not unchanging. The RSC may still decide to modify RDA in the following categories. Minor editorial changes. You will be delighted to know that if we reported paper to us we will be happy to fix it and other obvious errors. We will also continue to do edits to improve consistency, and some of those actually come out from the translators who suddenly have a couple of choices about how to translate a word and what did we really mean. So we will continue to make changes like that.

We also may consider additional changes if -- and this is a gift -- they will not have a significant impact on the translators, policy statement writers, and so forth. If we promise a stable text it needs to be stable enough for them to move forward with confidence. So the additional changes we will make need to also not affect the outcome of the instructions and applying the instruction.

We will continue to add and revise examples including for the translations progress, and of course we will be continuing to improve and add to the Toolkit interface and gentle talk about that later.

I have to emphasize that this phase does not start the promised countdown clock on the original Toolkit. This is just a phase, the 3R project is not officially ended at this point.

So you will be able to suggest changes now. Depending on what kind of changes you are suggesting, we may or may not be able to act on them. For now we are still keeping the feedback form available that has been available through the beta Toolkit site, and we encourage you to continue to use that to report errors and ask questions.

We also encourage you where you have regional representation on the RSC to work within your regions to identify areas for additions, corrections, or expansions.

Within Europe that is EURIG, North America is NARDAC, and Oceania is ORDAC. Each one of these regional organizations has presence on the RDA-RSC website.

And if you are not represented by a region you should feel free to contact me by my RSC Chair email and we will try to accommodate your concerns.

I also expect to be charging new RSC working groups in the next few months, and these groups will have international representation. If you find that a call comes out and you are interested, I encourage you to apply.

But again the bottom line is that any major changes that don't fall into that previous description of minor changes will have to wait until the beta site becomes the official version of the RDA.

I would like to jump in now into what has changed from the original RDA. And we have grouped this by think separate influenced by the development and the publication of the IFLA library reference model or LRM

First of all there are more relationships and fewer attributes in the beta Toolkit than in the original Toolkit. A relationship is a specific association between two RDA entities, and you have commonly called these relationships designators.

That's how they were presented originally. However these are now elements in their own right, and each one of them has their own element page.

As does its reciprocal because these are inherently reciprocal, those are also elements and they also have their own element pages.

You can see these mentioned that Jeff Bezos is the chief executive of Amazon and inherently Amazon has the chief executive Jeff Bezos.

An attribute is somewhat more limited, a characteristic of an RDA entity, and it does not have a relationship with another one. So for example, content type or dimensions, they are about the thing you are describing, and they don't have a relationship to any other element.

RDA has implemented the new entities from LRM in the beta site and these are agent. I have to emphasize that this is a person or two or more persons capable of acting as a unit, so it's not just a group of Sam or poetry lovers. And they must be real human beings. This is a change from the FRAD model, the functional requirements for authority data.

It is also implemented collective agent which is a higher level than corporate body and family but encompasses those. RDA has retained the sub-elements of the corporate body -- sub-entity, sorry, of corporate body and family.

Nomen. This is one of the stranger things and a little hard to wrap your head around. It associates a combination of signs or symbols or another words and appellation with an RDA entity. As we well know identical strings may refer to different entities and O'Connor can be one of many different people or one entity may have many nomens, Charles Dickens had a couple of pseudonyms that he used.

Places given an extensive space, although there is a recognition in the model that the boundaries may change over time.

And timespan is a duration of time which can be very specific and entirely tiny, or it can be a broad range. So anything from a nanosecond to something like the Bronze Age.

There are new concepts coming out of LRM as well. Representative expression elements are characteristics that

according to the model really lived at the expression level, but because they are inherent to the intention of the creator, they can become identified as work attributes. These things include, and this is just a sampling on the slide, original language, intended audience, date, duration, medium of performance, and for one work different attributes can come from different expressions, that does not have to be a single expression for all of these canonical expression elements come from.

So for example if you are dealing with a colorized film, the color content of the representative expression is monochrome or black-and-white.

Another new concept is manifestation statements. These are transcribed from the manifestation using the unstructured description recording method and I'll have a separate slide about recording methods later. This is really about how the resource represents itself. And the use of the manifestation supports machine transcription and digitized and born digital manifestations. There are 13 subtypes including one that encompasses both title and responsibility on the manifestation.

These really are designed more for data exchange or from -- from rudimentary cataloging rather than something that you would craft on your own as a catalog or if you are doing individual records, and therefore the more traditional individual elements remain in the Toolkit such as title proper, other title information, and statement of responsibility relating to title proper.

Another new concept from LRM, and I alluded to this when I mentioned appellations in nomen, are the appellation elements. This now includes existing elements such as preferred name, preferred title, and new elements that have been added to the beta site for access point, authorized access point and variant access point. These now are all elements. There is a total of 96 appellation elements on the beta site and they have undergone review and updating for consistency.

Principles were applied to place instructions in the appropriate elements because now we have more granularity. You can see a sample here of what relates to person, an appellation, a person, a name, a preferred name, a variant name, an access point, an authorized access point, a variant access point, and am identifier.

One of the challenges there was trying to figure out preferred name for example is really about getting ready to construct -- is not about getting ready to construct an access point. In my case I have used this example for some of you before, my presentations I give as Kathy Glennan but my publications I give as Kathryn P. Glennan, so if you are going to figure out my preferred name you are going to have to make a choice about that. But in neither case does my preferred name start with my last name and a comma. That is about building an access point. So we have broken up the instructions to try to clarify what goes where and apply them consistently throughout the Toolkit in these appellation elements.

A little different from LRM but still somewhat inspired by LRM is the category called RDA entity. This is an abstract class of conceptual objects which are of interest for research discovery. This is the top entity in RDA's model, as opposed to what is the top level in LRM which is *res*. This is a little bit narrower and it encompasses all of the RDA entities.

However we have created a related entity of a related entity of agent, of nomen, and so forth. This allows to referring from an RDA entity to a model that is outside of RDA. So it points out and there are no assumptions about what you are pointing out of RDA to.

There also changes because of LRM. I alluded to this. Person now must be a real human being, so unlike in the original Toolkit we don't have that category encompassing fictitious or legendary characters or real nonhuman entities. And because of the way LRM and RDA are structured, this characteristic of being a real human being has to also apply for agent, collective agent, and family.

Now this doesn't change the fact that we still have represented in our things that we are cataloging fictitious and legendary persons and real nonhuman entities. So how do we deal with that in the new model?

Well, fictitious personages named in manifestation title and responsibility statements are really pseudonyms of a person or a collective agent, and so they can actually be accommodated the way we deal pseudonyms all the time.

The more sticky part was trying to figure out about animals and other nonhuman performers because when these are in credits in films or something like that, what are we going to do with them.

This is where that non-RDA entity diagram that I just had on the previous slide comes into play. This is how we can accommodate those and not break the model.

So what has changed from the original RDA in terms of positioning RDA for linked data. This is one of the goals during the 3R project. We recognize that RDA needs to be used in several different implementation models, but we wanted to make sure it was well-positioned to use the data. Some linked data principles and terminology have come into play in the new Toolkit.

First is the vocabulary and coding scheme. This is really just controlled values for elements. Some are available in RDA on an element page, as well as via the resources tab if you drop down and you can click on the established vocabulary and encoding schemes that are maintained within RDA.

But the vocabulary encoding schemes can also come from outside of the RDA such as language codes from an ISO list or authority control system terms or codes or entries from other standardized lists.

The string and coding scheme is somewhat related to that. It's really specifying how to construct a particular string. And any of you who have ever constructed an access point but not created a corresponding authority record, you have actually applied a string encoding scheme that tells you for a personal name to put the surname first followed by the given name separating those with a comma and so forth. That is how you construct something in a string encoding scheme.

There is a new concept of data provenance which is broadly speaking where the information came from. And this can be whatever information and wherever it came from. It's not limited. It encompasses the sources of information from the original Toolkit, a statement like title from cover is actually a data provenance type of statement. You can include information from a reference source. I found when I am creating a collection of metadata about a particular author, I found in the reference source the author's birth and death dates.

It can also be who created the record or what we are now thinking of as a metadata work. I have created a bunch of statements about this thing that I am describing, I am the creator or my agency is the creator. Some of that we do right now in the North American LC NACO authority file. Our library

agency symbols are added to the 040 in MARC saying that we have responsibility for the latest version of that content.

So it's not quite as foreign as it sounds.

Another new concept is adding and being explicit in the Toolkit about domain and range. This is available under the element reference button that all of the element pages have. If you just click on that little eye icon you will get an opening of that entire display. And included in that are the domain, which is the entity that is described by an element, and the range, the entity that is the value of the relationship element.

So date of capture, the domain is expression and the range is timespan. And as we mentioned before, attributes are not the same as relationships. They are characteristics and therefore they don't have a range. So carrier type is only about manifestation, there's nothing else for it to relate to.

Other changes of note that I thought you might want to know about from what you have been used to in RDA.

Well, there are some new concepts of diachronic works. These are works that are issued over time and they can be monographs, serials like Le Monde, or integrating resources. And they include aggregates, compilations, multipart monographs issued over time and single works. So this example of Homer, the Iliad in Greek, Latin, and English is an aggregate. The Green Mile by Stephen King as originally published as a multipart monograph issued over time, it was issued over a several month period in 1996 originally. These are all examples of diachronic works.

There is also a new concept of alternative labels. These are also available under element reference for each element. These include verbalized terms which I find especially helpful in understanding the direction of relationship elements. The element name is employer, the alternative labels is as employer. And this helps me not get the relationship exactly backwards which some of you who have worked with me to help me understand which way I am really going at various times, so I am grateful for that.

Another thing that is there are retired labels from the original Toolkit where applicable. For example earlier title proper and later title proper are not elements in their own right anymore. They are actually just different types of title proper that are associated with a particular point in time. They are here as

alternate labels, so when you search that phrase you will end up with the right element, title proper. And if you can't figure out why you ended up with it, open element reference and see what you find.

There is also a new concept here of condition and option boxes which replace the original Toolkit's four different approaches to provide some sort of alternative or expansion on the instruction. Optional addition, optional omission, exception, and alternative. These apply when the instruction has at least one condition, and the option is to actually apply the instruction. The same set of conditions may lead to different options and I will be showing you some screenshots from the data site so that you can see what I'm talking about.

The first is a single condition and option. This is from authorized access point for work, and the condition is a work is created by an unknown or unnamed agent. And the option is to record a value that is based on the preferred title of the work. And you can see in this option box we have an example that if I were alive I could open that and see an actual example from the examples editor about how to apply this or how it would work in a particular situation.

The second is a single condition with multiple options. So this is the name of a person in more than one language. My condition is a value of a name appears in more than one language and manifestations. My first option is to record a value that is in the language that appears most frequently in manifestations. My second option is to record a value that appears most frequently in reference sources in a language that my agency prefers. So in most cases you are going to be applying one or the other of these options but not both. And this is where policy statements or application profiles come into play. You might use cataloger judgment; you might have an application profile or policy statement to help you figure out what to do.

You could have multiple conditions with a single option. Everything in the condition box is "and-ed" together, not "or-ed", so both of these conditions have to apply before this option can be applied. So if I have a date of work after 1500, and the title proper of manifestations that embody expressions in an original language of a work appear frequently in sources of information, then I record a value of manifestation in the original language. So although the if/then language is not set up explicitly in the data site, that is how these really work together. This makes it more of -- a more machine friendly way

of doing it. It's not language dependent in the same way that
the if/then or the and/or set up in the original Toolkit.

Finally you can even find yourself in a situation with multiple
conditions and multiple options. Here is named of family
consisting of a given name or a word or phrase. So there are
two conditions, name of a family consists of a value of person
with a given name, and a value of a name appears in more than
one language in manifestations.

My first option is to record a value that appears most
frequently in reference sources in a language that is preferred
by my agency, and another one is in case of doubt recorded value
in a native or adopted language of a person or the Latin form.
So again this may be something that your cataloging agency or
your region, however you are deciding to get guidance about how
to apply RDA, may have an application profile or policy
statement addressing this. Or perhaps they just trust you to
make the right decision, cataloger's judgment.

We can also have options with no conditions. So for title
proper there are two options for recording an unstructured
description. One is to record a value of manifestation title
manifestation, basically transcribed the title. The second
option is to essentially make a note if you feel that you need
to do so. So record a manifestation note on manifestation on
the source or basis for the value of the title proper.

There are some enhanced concepts. So you are someone familiar
with these, but we have taken them a little further. The first
is transcription guidelines. One of them is take what you see
which is very literal. And then there is modified transcription
which is essentially what catalogers do now when they adjust
catalog records, adjusting capitalization, adding diacritical,
and so forth.

The choice will be up to the cataloging agency and it may depend
on the source of cataloging. If you are ingesting vendor data
you were almost only going to say that is basic transcription,
take what you see, I'm not going to manipulate things, things
can be in all caps because that's how it is in the title, that's
fine. But original catalogers are still very likely to do the
modified transcription. Both are valid. Neither version of
transcription should prevent our end users from being able to
identify and select the resource that they are looking for.

Another enhanced concept is aggregates. This is a new approach
grounded in LRM. There are three types. There is a collection
aggregate, such as a collection of short stories. An
augmentation aggregate which is pretty much everything you see
is a monograph, a book with a preface, index, illustrations,
anything else that goes beyond the text that the author wrote.
And then there is the parallel aggregates such as that Iliad
example we saw earlier in the original Greek plus Latin plus
English. There will be another separate webinar specifically
about aggregates and so I won't go into detail on that.

As I mentioned there are four recording methods. There are four
different means of capturing data. They are not mutually
exclusive. And this represents what was already in RDA in the
original version of the Toolkit in part. It's just been applied
consistently to the element pages now on the beta site. There
is an unstructured description which includes transcribed
information and notes from the cataloger. There is a structured
description which includes access points and controlled
vocabulary terms. There are identifiers that are not actionable
such as ISBN and ISNI, and then there are IRI which is used for
linked data implementations. These are essentially actionable
identifiers which are globally unique. The choice among these
is also an option in many cases, and as I have mentioned before
with those options comes the cataloger interest in an
aggregation profile, policy statements, and/or best practices to
help choose unless you always want to use cataloger judgments.

Recently the RSC decided to implement what we call the agent
breakout. Now we have separate elements for relationships that
apply to all types of agents. These are explicitly declared
rather than what we initially hoped we could rely on the
hierarchy from agent down to selective agent and then to person
and corporate body and family.

The problem was that if you look for a single relationship, say
I know I have an individual person as an author without the
agent breakout and I went looking under author, or under person
in the relationship matrix and was not finding it because it
only lived at the agent level.

Instead we have declared these explicitly. So for something
like editor of text, we now have editor agent of text, editor
collective agent of text, editor corporate body of text, editor
family of text, and editor person of text.

I grant you some of these element names are odd or awkward.
They are clear but they are not necessarily what we want to
display out to our users. And I want to emphasize that you do
not have to do that. So for all of these on this slide you
could decide to display as all of these editors of text rather
than editor agent of text, editor collective agent of text, etc.
That's something you can manage in your application profile. And
you will definitely want to work with your vendors in terms of
the capability of doing that.

In terms of what has changed we have also left some old concepts
behind. First and foremost, as I'm sure many of you know,
instruction numbers. The way we have created element pages they
simply did not make sense to do that. But we recognize that
there are reasons to want to have some sort of shorthand to
refer to some particular parts of the Toolkit, beta site, so we
are going to implement citation number instead. This is truly
designed for use with print materials and other nondigital
communications. The links that are available to you through the
pop-up button that you see the screenshot on this slide, that
little chain-link, is a much better way to refer to a precise
part of the RDA text if you are corresponding in any kind of
electronic form. People can click on that to get exactly to
where they need to be.

But as I said we recognize this is not always how all of us
work. So the citation numbering will actually be in the format
that you see here. Two numbers separated by a period for a
total of eight numbers. The numbers will be random, permanent,
and searchable. So if you are looking in a single element page,
say name of person, there will not be a unique two number
element citation for everything on that page. It's going to be
totally random. It's all about being able to reference the
text, not to have number predictability.

The RSC issued a whitepaper explanation about this earlier, one
of the biggest challenges in the original numbering Toolkit was
trying to keep it current.

The numbers will be accessible from the pop-up toolbar. They
are not there yet, but there will be a new thing added to that
three-element pop-up bar so you will actually be able to view
the numbers.

Another thing that is missing is a PDF of the index. This is
not sustainable with the new Toolkit. So you're going to need
to rely on searching functions to get to where you need to go.

And finally actionable links between the AACR2 and RDA, AACR2 is now up on the beta site but too much has changed between the AACR2, the original Toolkit, and the beta site to maintain those links. We will be able to get to AACR2, that may still direct you to where you want to go in RDA, but you will need to use more traditional searching methods. There will not be hotlinked mapping between one and the other.

So with all of that change what is the same or similar? Many of the instructions are actually similar especially when you start delving into the meaning of the words. Some of the wording has changed, but a lot of the outcomes are the same. This is because there was commitment by the RDA Steering Committee that the 3R restructuring process would have minimal impact on current practice wherever possible.

So of course we did have to make some changes in limiting person to real human beings, but for the most part there are ways for you to keep doing what you have been doing.

The outcome of doing and applying the instruction should be similar even if the wording is slightly change. And right now we have what we are calling soft deprecated elements. All of the details of elements in the original Toolkit such as details of file type are present in the beta Toolkit, but when you go to that page it makes it clear that it's better to record this as an unstructured description of file type or whatever else your details of element was.

Why is that? It's because there is now we have made all of these recording methods explicit, and it really is technically no different between the details of file type instruction in the original Toolkit and an unstructured description of file type in the new Toolkit. Over time we anticipate pulling out these soft deprecated elements and making it hard to deprecated, but in terms of easing your transition into using the new RDA, we wanted to make those available to you.

I will note with more options about how to record data you can keep recording data the same way, but you can also try something different if it works better for your users or the new environment you are working in.

We wanted to show you a few things that were similar. And the original Toolkit this if/then for parallel title proper says 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 title proper. For the most
part this instruction is unchanged, but now there are two
conditions just as they were in the original Toolkit. An
original title is in a language different from that of a title
proper, and an original title is presented as an equivalent
parallel title proper. The option is the then clause, record
the original title as a parallel title proper. A little bit
different wording, same outcome.

For names of titles, this is an excerpt to show you how
somethings are similar and how they are different. Names of
agents under the recording title, if a title consist solely of
the name of an agent record the name of the title. That is and
if/then statement that is not presented as such in the original
Toolkit. Now this is clear in the beta site. Under titles
consisting of a name of an agent from a title of manifestation,
you have the condition clearly labeled, a value of manifestation
title and responsibility statement consists only of the name of
an agent, and you have a clear option, record the name is a
title.

Some glossary definitions that are similar but a little
different. In the original Toolkit, date of birth was a year a
person was born and it included a scope note that said the date
of birth may also include the month for month and day of the
person's birth. In the beta Toolkit is the same name, but the
definition has changed. As timespan during which a person was
born. And remember I told you that a timespan could be a
nanosecond, so don't freak out over the beginning and ending
kind of concept for a date of birth.

The inverse is explicitly declared in this case.

And then in the original Toolkit, form of work, a class or genre
to which a work belongs, the terminology has changed to category
of work, yet it is very clearly still the same thing. It's a
type to which a work belongs and includes a class or genre.
And you get the glossary use for form of work, so if you come
into the Toolkit knowing the old label you will be directed to
the new element for this category of work.

The MARC mappings are somewhat different and we do know they are
not complete at this time. In the original Toolkit you have a
separate page with a couple of different tables. So for the
MARC mappings for the 337 field for media type, you would get
the displays in the top half of the slide. Now in the beta

Toolkit you can search 337 in the search box and get back to media type here. And that information, that mapping is in that famous element reference box that if you click on it you can see it and you can see I have given you an excerpt embedded maps MARC 21 bibliographic 337 and subfield a and subfield b to this, so that is how the MARC mappings work now and they will continue to be developed and updated.

For more information, I strongly encourage you to visit these following websites. The RDA Steering Committee website as a whole, as I mentioned the individual regions have pages off of this website. There was also a presentations page from 2019 and earlier as well. Most of our current presentations of interest are there or will soon be there.

There's also a 3R project of frequently asked questions site.

The RDA Toolkit has its own website where you can get information about what's going on from the publisher's perspective, and it includes 3R project updates.

Of course there is the beta Toolkit site, and just a reminder that you have to have a log into the original Toolkit or otherwise make arrangements with ALA Publishing to have access on a trial basis.

And finally there is an RDA YouTube channel, and presentations such as this one will be sent to you, but I also anticipate that they will be available on the YouTube website as we move forward.

So I will pass this on to Jamie now.

>> JAMES HENNELLY: Okay. Can everyone hear me?

Hello, I am James Hennelly, director of RDA Toolkit. I will kind of pick up where Kathy had left off.

Typically I do a demo at this point. I usually do a live demo. But I'm not going to do that today. I'm going to kind of focus on what changes we have made in the April 30 release and what is coming up soon. And then also talk about our plans for further down the road with the continuation of the 3R project.

I wanted to start off by just encouraging folks to subscribe to the RDA Toolkit YouTube channel where we have already posted some videos that get into a little more detail about certain

aspects of this. And I also want to encourage you to subscribe so you can come back to it, because we will be adding updated material. I will actually live demo on the site recordings of certain aspects of this as they come up. And certainly new developments as they come up I will add demos there. And we will of course add some more presentations, etc., that folks are doing about 3R and the beta site will be added there as well.

So check out that YouTube site.

We had in April 30 release, Kathy already talked about the stabilization, I'm not going to really add anything to that.

There were some fixes to existing features. Most of them related to search and the HTML editor, but a couple of other different things. I will go over all of these.

Addition of new features. And we had a few -- we have several new features that we really wanted to have up for April 30, but the timing didn't work out. So we had some shifting of resources in the last month, etc., so they had been pushed back and they will be part of a May follow-up. I will talk about what the May follow-up is going to be.

So into this. Improved search. This is typically how such currently works on the Toolkit. Current search does not support Boolean terms. Rather it assumes an "And" relationship between search terms.

The reason for this was we were finding some difficulties with changes to certain -- searching on certain specific phrases in the catalog and things like that, and we wanted to make them available to people without having to necessarily use the phrase approach.

You can use phrases, you can use quotation marks around your search and it will search that entire phrase together. You can use the asterisk for the wildcard in the Toolkit.

We also support search on instruction numbers on the beta site. So you can search on the instruction numbers from the original Toolkit site and get some results in the beta site. I would warn you that, you know, that that kind of -- the metadata behind that is all entered manually, so it is somewhat limited. So if you go search for something that is maybe four digits deep or three digits deep, X.X.X or something like that, if you don't

get anything I would recommend you back off and do an X.X search or something like that, you are likely to have more success.

Other changes we have made to search, we have added highlighting. So on the left you can see a sample of the search results page, you can see the search terms are highlighted in the search results. But then you can also click through to the page and you can see your search terms are still highlighted when you click from the search results page into the new page. And if you are satisfied with where you are at and you don't want to see the highlighted terms anymore, you can just click the far right breadcrumb above the title and that will remove all of the highlights.

We have corrected one -- one of the fixes as we have corrected the filtering of search results. You can see you have the search results but I have filter them for glossary, I checked glossary, it defaults all display on searches has gone off, and you can just see the glossary entries now. So that was fixed.

We made a bunch of improvements to the HTML editor, and we can stabilize text now. You can feel comfortable to go in and start creating some documents if you like in the beta site. We have basically added as many of the macros as we could, so it's a pretty extensive toolbar up there at the top to work with. We also added a source view, so if you are comfortable working in HTML, you can switch to a source view and edit the HTML directly. This is an HTML editor, just to be clear. If you copy and paste your word document into it, it won't necessarily format exactly like you thought it was going to. And you may have to do some tweaking, etc., on that.

We are still also making a few little improvements on this HTML editor site, with gotten a lot of feedback from one of our heavy users of this tool. So we are making some further adjustments as well.

So one of the things we have added is this breadcrumb navigation. Right now it's a very simple navigation, it really gets beyond the entity element. If you get into the guidance chapters it might go a few levels deeper. The breadcrumbs of course are meant to provide more context for the instructions, and you had a little bit more of a navigation tool to hit. Breadcrumbs are all linked.

The breadcrumbs, one, we needed to add them for guidance chapters and resource chapters, but mostly it's because we had

an issue with the visual browser we had planned. And this is a
source of disappointment for us, that we have had to put the
planned visual browser kind of on hold and take it off the to do
list for 3R. The reason for this is when we originally
envisioned the visual browser as part of the 3R project, we did
not expect to have the level of the high number of elements that
we have right now. And we haven't looked -- we need to look at
the structure a little more deeply to figure out how this works
as a visual component. Right now it doesn't. We have pursued
this, we actually did a mockup of the visual browser, and what
we came up with was not very visual, it was more text. And we
need to think about how -- a little harder about how we display
the structure of RDA to the end-user in a way that is more
edifying. Because one of the goals of this, the visual browser,
was to instruct people about how he RDA elements and entities
relate to each other, how they are built, how they are
instructed, etc. And so we want that to be revealed and
clarified by this visual browser. And then of course it is a
navigation tool that is important, that's an important part of
this.

So again it's been a disappointment that this isn't working out
right now. We need to go back to the drawing board, as they
say, and think about this again. The costs of this visual
browser with the kind of structure we had been thinking of
before was extremely high and we want to be sure that if we are
going to spend a lot of money, we're going to get something out
of it that is really of benefit to the end-users. So we had to
back off of that and come back. And we want to come back to it.

So the breadcrumb navigation is an alternative to this lack of a
visual browser for now. It's not a long-term alternative. We
are going to continue exploring a better approach to meeting
these original goals of navigation and education for the beta
site, and that exploration may bring us back to the visual
browser approach in a different way. Or it may mean expanding
and enriching the breadcrumbs to make them more useful. And it
may mean kind of a combination of both, because I think the
breadcrumbs will ultimately be an important part of at least
guidance chapter navigation, etc. And the visual browser has
always been intended to address entity and element navigation.

These all tie into the relationship matrix as well that you find
on the site. And there are issues with the relationship matrix
as well, and the solution we currently have on the site is not a
good one and is not one that we are able to easily update. So
these are all a crucial technical problem that we are dealing

with now and really it's taking up the major focus of our
attention in these next few months, to try to figure out a
better solution for these things.

I added what I call some data document -- a little data document
at the bottom of each page. And these are meant to give people
just a quick -- one, give people a citable URL for each page,
and then also provide a date for when this was last updated. So
the document date that you see at the bottom -- and this is
something we had in the original Toolkit, this kind of statement
-- the document date at the bottom reflex when this page was
last updated.

We will only change that document date if the update is a
reported change. And I just want to be clear about this. So a
reported change would be if we added new examples, or if we
added a new option or condition option, or if we reworded an
entire instruction. Some significant change or change to
definition. Those would all be reported; they would be reported
out to you in release notes so that date will change.

If I went in and I fixed a broken link on the page or I
corrected a typo, you know, if there was an extra space or
something like that, that would not be a reported change and I
would not change that document date. So you would not know that
that page change, but I would have changed it. So anyway,
that's what that date means, and this is going to be important
in our documentation going forward because if you come to a page
and say I don't remember reading it that way, you need to go
look at that document date and say oh, this is when it changed
so I'm going to go back and find the release notes for that
date, and the PDFs that are archived from before that date so I
can compare and see exactly what changed and what happened.

The document URL is very long, it's reflective of the direction
of the work we were doing in development like that. And in the
May follow-up were going to try to clean up that URL and shorten
it up and make it a little more adjustable for folks.

I should also make clear that this document URL on the bottom
does not replace the ability to highlight anywhere in the text
and get a URL for linking purposes. That tool, that pop-up tool
that allows you to create a link is still there, and of course
it allows you to go to specific points within the page, to link
to specific points within the page.

Kathy already mentioned AACR2 has been added to the site, it's link at the bottom of the resources tab. You will see it says AACR2. It does require a Toolkit subscription to access it. The display of AACR2 includes an expandable collapsible browse structure which does not have a search feature. It includes cross-reference links within AACR2. It is not including any links to RDA. And there are no expected updates or enhancements, so this RDA AACR2 display -- if there is really an egregious problem, do let me know, but it's not something that we are going to be developing or looking to put too much resources into.

So the May follow-up. The May follow-up will likely occur on May 22. It will include these four significant developments. Citation numbering will be added, we'll add print PDFs, a new admin site will go up and we will add a help guide and model go to more detail on all of these things.

Kathy has already talked about the citation numbering and how it will be searchable, and you will be able to access it through the pop-up bar to get the number like that. I just want to add a couple more things. So we are adding citation numbering in entity and element pages and guidance pages and related resources which is the middle section of that resources tab. So these are kind of traditional RDA instruction areas. We aren't going to add citation numbering to the glossary or the vocabulary encoding schemes and stuff like that.

There will be numbers -- the numbers at the top of the pages, the citation numbers are obviously to discrete sections of the text on each page. The basic approach we have taken for this initial numbering of the text is to put numbers in at all points where there are headers, and also to put citation numbers for all condition statements and all option statements.

The only exceptions to these with the headers are definition and scope, element reference, and related elements. And those are all sections that are auto generated by our script that updates the Toolkit with information from the RDA registry, so we did not feel that is an appropriate place to put in citation numbers.

If you find the citation numbers aren't granular enough in the area where you think they should be, that's perfectly fine. That's a perfectly fine comment to submit to us. You can say just in general I think they need to be more citation numbers granular to every paragraph if that is your thought, and we will

take that under advisement. But if you think there is a specific passage that is particularly important that merits a citation number, you can also tell us of that and we can -- it's not difficult for us to go in and add a citation number to a specific passage or something like that if it is not currently covered by one we roll out and there was strong feeling that it needs to be.

Print PDFs will be added for each page. So this will work much like it does in the original Toolkit, you click on the print icon if you are on a page and it will open up a PDF that you can either print off or download.

The PDF full be only of the page you are viewing. So in the original Toolkit when you clicked on print, you got the whole chapter that was associated with it, the entirety of the chapter. In this case if you were on the carrier type page you will just get the carrier type file when you click print for the PDF. And this will be true of guidance chapters. If you are in a guidance chapter in the page you're looking at, that's the PDF you are going to get. You will get anything more than that. And I think I should bring up at this point just our general plan for print.

The print RDA as we have done it in the past is not feasible with the current Toolkit. It's not the same sort of resource and it would be much too big of a print size. So we will try to offer a range of print resources that we think effectively substitute and meet the needs of catalogers who prefer to rely on print. So we will have the entire print glossary, hopefully later this year that will be out. We will update RDA essentials hopefully in the next year. And we are also thinking we will develop a new product called a book of examples, I call it the big book of examples. I call it the big book of development, but we will try to pull together examples and organize them in a way that we think will be really constructive and helpful to our users. That's the plan we are working toward with that.

Next up, admin site and help. It's going to be a completely new admin site. It will have a different look and feel than the old one. I don't know how many of you actually used the old one, but we hope this will be a little more accessible. And is going to have more things you can do with the admin site. You can still get the reports that were available from the original admin site, but we will also be adding a couple new features including the ability to manage staff profiles. So if you have staff that has created a bunch of profiles or you have had staff

that created a profile and has left, you can go in and delete
those profiles if you don't need them anymore. And you can use
that management tool to also set who can have access to the HTML
editor and work on documents, etc., like that.

We are also going to add the ability to create institutional
views. And that means that it's kind of setting preferences for
your staff. So you can set an institutional view which means
when your staff comes into the Toolkit and they are logged in,
they will see the policy statement documents that you want them
to see. They will see the examples that you want them to see,
etc., like that. Any of the things that you can set in a view
preferences menu you can set for your staff and have that
control.

You will also be able to turn on certain things you don't want
your staff to use. If you don't want them locally sharing
bookmarks or notes, you can turn that function off so that
everything is just kept private.

So those are the kind of things that will be added to the admin
site.

The help guide will be coming. It will cover -- it's my
intention it will cover all of the features and functionality
through that May follow-up release, so it will have comments on
how to use the new admin site, on how citations numbers work,
etc., etc.

And then I also just again I want to plug the YouTube channel.
I will do little YouTube videos demoing all of these things for
the May follow-up on the YouTube channel so you can check them
out there.

How my doing for time? I need to get moving.

Accessibility. Accessibility remains a really core component of
what we are trying to do with the 3R project. We have taken
significant steps toward meeting the WCAG AA standard, keyboard
accessibility has been implemented. Screen reader accessibility
has been partially implemented, but we've got more work to do
there. After the May follow-up release we have signed a
contract with a firm that will do a full evaluation of the site
to test its compliance with the AA standard from WCAG, and they
will give us recommendations for remediation on that and we will
do our best to meet all of those recommendations. So full

compliance, compliance with AA WCAG standard remains our goal. That hasn't changed and we are still working on it.

This webinar is the start of what we call the orientation project, or at least that is what I call it. It's going to be a series of webinars, online courses, Toolkit demonstrations, the YouTube channel of course, other resources posted online and made available to people. Hopefully we get all of these things translated and made available to people in their preferred languages like that. But we know that there is a lot of demand out there for further explanation and assistance in understanding the new beta site. And changes to RDA. And we are going to do our best to facilitate that.

After the May release I will do a full live demo of the entire Toolkit site. It will be a free webinar, and we will probably have those once every two months for the next year or so. So we will continue to offer free live demos of the Toolkit and how to use the beta site Toolkit.

Following that we are going to have a series of what I call online orientations. They are going to be offered -- I should say these are the goals of the orientation project. I have talked about this in some other venues before. We want to assure that everyone is comfortable with the navigation and features of the redesigned Toolkit. Introduce users to core concepts including those changes related to the library reference model. And we also have heard a lot of feedback from LIS instructors and we want to make sure that we can facilitate or meet their needs for teaching with the Toolkit and teaching RDA. And also address the needs of trainers as they go out to train people on this themselves.

The next step is the online orientations, and these will include two series that will run in July and August and then LIS focused event in August. The first series is what we are calling new concepts listed here. This will be offered through ALA e-learning or e-resources, I always get confused by that, sorry Dan.

And these will be 60 to 90-minute webinars, I think we have a nice range of presenters involved. Bob Maxwell, Bill Walker, these names might be familiar to you. And these will help take a deeper dive into all of these topics that you see listed here and offer you some more insight into what is going on here and hopefully address more of the questions that you have.

What these will do, what we see these webinars doing is kind of
introducing you to what these concepts are, where they came
from, how they are being dealt with in RDA, and then at the end
also provide you with some practical examples of how to apply
these concepts.

The other series, special topic series, will begin with
application profiles. I know there's a lot of questions and
concerns about that. And some of these topics in online
orientations as we see how people react to them will also
develop into full-blown e-courses that we hope will go into even
greater depth and give people some real practical workshop type
experience with dealing with these topics and new approaches,
etc.

And then finally in mid-August there will be a teaching RDA
after 3R webinar led by Brian Dobreski, I think he's currently
at Syracuse, who will give us a template for how we can start
thinking about teaching RDA in this new environment and what are
some new approaches to take part and I really hope that this
might lead to an e-course, I hope it leads to a discussion and
exchange of ideas about how we can put together different
approaches to teaching this and training on the new Toolkit that
we can farm out to everyone after that.

And all of these online orientations will be recorded, and they
will be made available to folks in a variety of different ways.

So coming soon. The next major release to the Toolkit will
probably be in August. It will include release notes and
stabilized text, so if we have come back in August and we have
made changes to the text, they will be reported to the public.

I hope to add some sample policy statements during that time.
So with the stabilization, as Kathy mentioned, this is no one
policy statement starts getting to work. I don't expect the
sample policy statements to be real policy statements, but they
will reflect how policy statements will function and operate in
the Toolkit. So at least you can start getting a better sense
of that.

Wishful thinking that maybe we pop up a translation in that
timeframe. That's very wishful thinking on my part, although I
do feel the translation process will have its bumps, but it
won't be as difficult because of the way restructured things.
Hopefully it won't be as challenging a process as it has been in

the past on the original site. And I think policy statements
will take longer to write because there's a lot of work to do.

And of course we will continue to evaluate feedback that we get
from users. So that feedback button remains up, please use it.
We do take that information and we incorporate it, we have
incorporated it already and a lot of the things you see on the
new Toolkit and the changes we made in April are the result of
feedback we got from users, so if you have constructive and
specific feedback for us, we will take it into consideration.
And it might be something that we act on right away, it might be
something that takes us a while to get to. But we do read it
all and we kind of triage it and move it into different areas of
work that we will address when we can.

And finally just repeat also what Kathy said, the beta site will
be under continuous development. It's not officially sanctioned
for cataloging. We've had a lot of discussions within the RDA
administrative structure about determining what is suitable
Toolkit for official use, a suitable new Toolkit for official
use and how to evaluate that. And we will be sharing more of
that information with you as it comes.

But do know that our minimum expectations are that all of the
translations on the original Toolkit will be ready or close to
ready before we even start considering flipping the switch on
the new site. And also be expect policy statements, a
significant amount of policy statements to be published and
ready on the site before we flip the switch as well. So that
evaluation will be ongoing in the next nine months or more, and
any decision to flip the beta site to the official site will
come only after full approval by the RDA Steering Committee, the
RDA Board, and an announcement to the public that it is
imminent. So stay tuned on all of that stuff.

I think that's all I have. So we are open for questions now.

>> DAN FREEMAN: All right Jamie and Kathy, we are going to
unmute folks since we are not exactly sure -- some I prefer one
of you, some I prefer both of you, so we've got a ton of
questions and we will run through them and get to as many as
began.

First question, what exactly does RDA translation mean?

>> JAMES HENNELLY: RDA translation?

>> DAN FREEMAN: That is the question.

>> JAMES HENNELLY: Oh. I'm not sure I understand the question.
RDA translation is the translation of RDA, is the translation of
the instructions of RDA, the contents that you would find under
the entities and guidance tabs in the beta site. As well as the
middle portion of the resources tab. That means you have
translated all of that into a different language. There are
different levels of translation. Some people do what we call a
partial translation or a reference translation which means they
just translate the information that is on the registry, which is
effectively the glossary, if you will, of RDA.

We have different arrangements with different language
communities.

>> DAN FREEMAN: In the interest of getting to as many questions
as possible, why don't we wait and see if we can get a
clarification on that and if we do I will let you know. I will
move on to some of the other questions.

Is an aggregate work necessarily diachronic?

>> JAMES HENNELLY: I will let Kathy take that one.

>> DAN FREEMAN: Kathy, are you still with us?

>> KATHY GLENNAN: I was afraid of that.

>> JAMES HENNELLY: There you are.

>> DAN FREEMAN: We can hear you, Kathy. Kathy, I'm sorry, you
are really, really quiet, is it possible to move the microphone
closer?

>> KATHY GLENNAN: I don't think so. Is that any better?

>> DAN FREEMAN: There we go.

>> KATHY GLENNAN: I will practically swallow it for all of you.
I think that was answered in the chat, that aggregate works can
be static as a single issue such as a compact disc with multiple
musical recordings on it. That's an aggregate but it is not
diachronic.

>> DAN FREEMAN: Okay. Moving on. And sorry if that one was
answered in the chat already. We are trying to follow along,

there has been a lot. There's a concern that synchronic and diachronic maybe examples of the original RDA propensity toward inaccessible language. Are we starting to see more plain language description of rules in this iteration?

>> KATHY GLENNAN: Diachronic was introduced as a term to label a brand-new concept. I do not believe synchronic is used in RDA at all. The inverse of diachronic is static. And we are attempting to do our best to keep plain language. I know not everyone agrees that we have been successful, but part of what has driven some of the language terms is some of the automated translation capabilities that we are looking to implement to support all of the many translations that we are expecting either of the full Toolkit text or the registry entries.

>> DAN FREEMAN: Okay. Next question, what exactly is an application profile, who creates them?

>> KATHY GLENNAN: An application profile will tell you what elements are relevant in your setting, what things are repeatable, what things are core. And how you are going to approach it. It is almost an outline from your user community to find the most relevant aspects of RDA for your situation. We do not expect individuals to create application profiles. They should be community-based, either in your region or based on the formats you work with, and if you want more as Jamie mentioned there will be an orientation webinar specifically on application profiles.

>> DAN FREEMAN: All right, moving on, will there be an index?

>> JAMES HENNELLY: No. There will not be an index.

>> DAN FREEMAN: All right, I wish they could all have yes or no answers like that. When two conditions are in the same box they are logical and even though -- I'm not sure I understand this question myself -- if conditions are --

>> KATHY GLENNAN: I do. Yes, there is no explicit and connecting conditions in the condition box that is understood and explained in the relevant guidance chapter. It's something people are going to have to learn.

>> DAN FREEMAN: All right, and I think this one is for Jamie. When is the beta Toolkit going to be official and no longer beta?

>> JAMES HENNELLY: I tried to talk about that at the end.
There's not a hard date right now. You know, Kathy and I were
in the RDA Board meeting in the first part of this week and we
discussed this and what the processes to determine when the beta
site is official. One of the -- a high-level baseline that was
set in the meeting is that we believe it will be when we believe
the Toolkit is fit for use in training and in practice. So
that's an evaluation we have to make in coordination with the
Steering Committee and with our translation partners and our
policy statement partners and feedback from the community.

But we are entering into discussion now we are trying to set
some parameters for that. But I did mention at the very end
that we expect translations that are in the current Toolkit to
be done and published on the beta site before we make the
switch. We expect policy statements to be significantly present
in the beta site before we consider the switch.

So a timeframe for that, when people push me for a timeframe, if
you asked me this year ago I would have said December 2019.
Right now I would probably say, if I had to guess, February or
March 2020. But I'm guessing. You know, we have to see how
things move. There's a lot of new processes involved in all of
this. Policy statement writers have to grapple with what --
they are for the first time having to dig in deep and start
really thinking about what they want to do with this content.
So you know, it's going to take a little time.

>> DAN FREEMAN: All right. Will there be a crosswalk between
the old and new terminology?

>> KATHY GLENNAN: This is a little difficult to answer. I
certainly showed some examples of how the old terminology is
being mapped for navigation either when there is a 1 to 1 change
such as a form of work becoming category of work, that is clear
in the glossary through a use form. And also how those
alternate labels such as removing earlier title proper and later
title proper as elements to become just forms of title proper
associated with the timespan. Other changes are not being
mapped, they really have to be things that we are certain that
people would be looking for or we have actually changed an
element name or something like that and anticipate people would
need to have the mapping elsewhere.

>> DAN FREEMAN: If there are no core elements, how do we define
a minimum quality record please?

>> KATHY GLENNAN: Aspect of the application profile. A minimum
quality record in one community is not going to have the same
things as in another community. So RDA leave that open to
practitioners to collectively determine.

>> DAN FREEMAN: How much of all of these changes are based on
feedback or requests from the library community?

>> KATHY GLENNAN: It's been a mix. We based the original RDA
on the IFLA functional requirements models. The fact that those
were replaced by IFLA LRM drove a lot of the changes that you
see. Part of that was library community driven because it's an
IFLA standard. Also as we continue to develop we consulted with
specialists to make sure we were trying to address particular
gaps that they found in the original Toolkit, and we have the
feedback form open on the beta site since we made it publicly
available. So I don't think I can quantify what came from
where. It came from a number of different sources.

>> DAN FREEMAN: Okay. We still have a lot more questions and
to just let our audience know, I don't think we will get to all
of these questions in the time we've been allotted[Microphone
Noise] quickly as possible, and I know I am taking more time by
saying that.

Will application profiles be provided over we need to create
them on our own?

>> KATHY GLENNAN: For something specifically expect communities
to come together and create an application profile. But as
Jamie mentioned at the RDA Board meeting earlier this week, we
talked about having a general application profile provided in
the Toolkit for all users of the Toolkit.

>> DAN FREEMAN: Is there a plan to have the page URLs reflect
the citation in a means that would be useful.

>> JAMES HENNELLY: Sorry, can you say that again?

>> DAN FREEMAN: Sure. Is there a plan to have the page URLs
reflect the citation numbers, that seems like it would be
useful?

>> JAMES HENNELLY: No, there is not, and it wouldn't be.
Because the page URLs, there's a lot of structural process
things involved in all of this for us. The page URLs are
randomized IDs and the citation numbers need to be a little more

human digestible, etc., and they are also randomized in a
different way. So really they are two different needs and it's
not -- it's not something that would work for us from a
production and processing point of view.

>> KATHY GLENNAN: I should add that the page URL will have a
lot of different citation numbers on it.

>> JAMES HENNELLY: Yes.

>> DAN FREEMAN: Okay. And which format will be used for the
example, that's a very general question.

>> KATHY GLENNAN: I think if you are interested in examples, I
encourage you to explore the beta site. They are in a number of
different formats. They have included complete examples on
certain element pages with your element highlighted, but you can
see how that data element relates to the whole metadata
description set. So they will be in a variety of formats. But
they will not be tagged as say for MARC. They are textual
examples. We do have some modeling of how a linked data
visualization would look, however.

>> DAN FREEMAN: Will you be able to upload -- sorry -- will you
be able to upload local policies and procedures to your view to
create interactive and local views.

>> JAMES HENNELLY: Yes. There are several features you could
use. You could use the documents, the user contributor document
tool, the HTML editor I showed a little bit of to create your
own workflow type documents if you want. You can also take
advantage of bookmarks or notes that can be shared locally.
That means within your subscription, within your institution,
and those notes -- the notes are basically bookmarks with text.
So those can allow you to -- when you come to an option you can
have a note there that says apply this option or don't apply it,
stuff like that.

So there are several tools that can be used within the Toolkit
and will go over those when I do a full site demo, that can be
used to convey local policy practices.

>> DAN FREEMAN: Who can I contact about accessing the beta
site?

>> JAMES HENNELLY: Me. You know, if you go to the beta site,
if you go to the rdatoolkit.org you will see a big button there

in the left column to sign up for a free trial. We offer free
30-day trials, and if you are signed up for a free trial you can
get into the beta site or the original Toolkit site, you can
look at both.

>> DAN FREEMAN: Have you done usability testing on the Toolkit
and the phrasing of the text to see if they end up with a
catalog record that reflects the RDA implementer's intent.

>> KATHY GLENNAN: This is not possible to even think about
until we have a stabilized text. I've done a presentation about
how you might use RDA to catalog a simple monograph after
determining that there really was no such thing. And this
really still won't be possible without application profiles and
best practices among the catalogers. That's the next step and
that is the important part that we still need to work onin this
phase of 3R.

>> DAN FREEMAN: Will Maxwell's handbook be updated for the new
Toolkit?

>> JAMES HENNELLY: Yes. Bob Maxwell will be teaching three of
the online orientations. I talk regularly with Bob about things
that are going on with this, and he is eager to master all of
this himself so that he can update his book.

>> DAN FREEMAN: All right. Will fictitious character still be
established as personal names but not be allowed to be used as
authors of works?

>> KATHY GLENNAN: This is an implementation question and
different communities may have different answers. James
mentioned that there will be an entire webinar about fictitious
entities, and I would encourage you to hold that question until
that presentation.

>> DAN FREEMAN: Okay. Why are Boolean operators not supported?

>> JAMES HENNELLY: You know, we were just having some problems
with certain searches not coming up because of -- they use
Boolean terms, but they are not meant to be used as Boolean
terms. The alternative is to use phrasing to get around that,
but we wanted people to just type indirectly. It's, you know,
it's something we are really experimenting with. We can turn it
back on if people really feel strongly that they want Boolean
operators.

>> DAN FREEMAN: All right, we actually did get that to the last question on our list. Will be possible to have hyperlinking sections in the future if it's not possible now.

>> JAMES HENNELLY: Hyperlinking sections. I'm not sure I --

>> DAN FREEMAN: That's what the question says. I'm not sure who asked that but if anyone -- if they have --

>> JAMES HENNELLY: I don't know if that was in reference to the AACR2 display?

>> DAN FREEMAN: We can wait to see if there was a clarification bargain is another question that is probably a yes or no question, will Ed Jones be updating RDA cataloging?

>> JAMES HENNELLY: Yes, Ed is doing the aggregates and diachronic works webinar. He may be joined by another person, I haven't been able to reach that person yet to confirm that, but Ed is confirmed that he will be part of that webinar and we are excited to have them involved.

>> DAN FREEMAN: All right. Well, we are at the end of our time. So Jamie and Kathy, we want to thank you for your presentation. Any final thoughts before we wrap?

>> KATHY GLENNAN: Not from me. I thank all of you for attending.

>> JAMES HENNELLY: Yes, thank you very much. I know there are a lot of changes coming your way and there's lots of trepidation and concerns about them, and we are always happy to hear what you are thinking and know that we are working towards -- we are still working on this beta site and this Toolkit and we are working towards a better product for catalogers.

Look for information about the online orientations, it should be coming out within the next couple of weeks, okay? And the release on May 22.

>> DAN FREEMAN: Yes, and when the information about the orientations comes out, we will have more information about pricing. I saw there were some questions about that as well.

All right well thank you all so much. I hope everybody has a wonderful day or evening or morning depending on where you are

in the world, and we will look forward to seeing you soon at the orientations. Thanks everyone.