

Using the Beta RDA Toolkit



**RDA Toolkit Workshop: A Crash Course
ALA Midwinter
Philadelphia, PA**

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Getting Started

Accessing the RDA Toolkit Beta Site

There are three ways to get to the beta site:

1) Use the URL

In the address bar of your browser, type “beta.rdatoolkit.org.”

2) Link from the Original Toolkit (access.rdatoolkit.org)

In the original Toolkit, there is a link at the top of the page to the beta site. You do not need to be logged in to see or use the link.

Click on the underlined text to go to the beta site.



3) Link from the RDA Toolkit Home Page (www.rdatoolkit.org)

On the RDA Toolkit home page, the second of four links on the left-hand side is a link to the beta site. Click on “Explore Toolkit Beta Site” to go to the beta site.



Logging In and Out

*Note: These instructions are for using the beta site at the **RDA Toolkit Workshop**. There is not IP authentication for this event so you may notice some differences from using the Toolkit in your institution if it has IP Authentication.*

If you are an existing RDA Toolkit user and have your username and password, use the Single Login method. If you are not an existing RDA Toolkit User, use the guest username and password provided for the workshop. You will not be able to create a profile or do any of the personalizations such as creating bookmarks and notes.

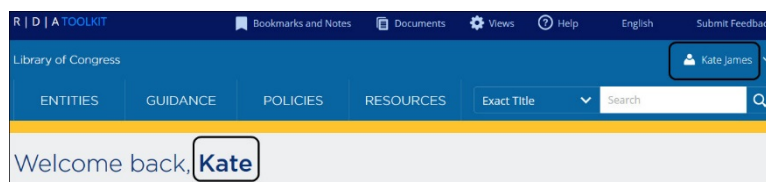
Single Login

If you have a user profile, the single login method is the most efficient way to access the beta site. Your username and password for the current RDA Toolkit should work in the beta site unless it is not unique. Type your profile username and password in the boxes at the right. The Toolkit will automatically recognize your institution from your username.

After you enter your profile username and password:

- the welcome message will change to “Welcome back, [Your Name]”
- the Profile icon will also show your name

The Toolkit picks up your name from what you entered when you created your profile. If you do not like the name you see, you can change it by clicking on your profile icon and then on “Manage Profile.”



There are some new requirements for profile usernames and passwords:

- usernames and passwords are case sensitive
- usernames must be unique.

Note: Usernames must be unique for *all* users, not just within an institution. If you created a profile in the original Toolkit, it will continue to work in the beta Toolkit unless it conflicts with another username. For example, if a Toolkit user at the Library of Congress has username “John” someone at the British Library cannot also have a username “John” because it is not unique. This is a change from the original Toolkit.

Unable to Log In with Profile Name and Password

There are two likely reasons you may be unable to log in with your profile name and password:

- your username and password are not unique
- you do not have a user profile in the original Toolkit.

Currently, it is easier to change or create a user profile in the original Toolkit site then use that information to log into the beta site. If you need to create a profile or change your profile name, it is suggested that you use your email address as a profile name to avoid potential duplication with other profile names.

Forgot Password?

There is a “Forgot Password?” link above the “Log In” button on the home page. Click on the link to be taken to the Forgot Password? page. Enter your username and select “Submit” to have a reset password link sent to the email address associated with your username.

Logging Out

To log out intentionally (i.e., not timed out), click on the drop-down menu next to your profile name. Select “Log Out” to end your session. After you have logged out, the page will change to say “Goodbye.” A hyperlink is provided that says, “Click here to return to the RDA Toolkit” is provided. However, this link will take you to the **original** Toolkit. To return to the **beta** Toolkit, click on the box that says “Explore Toolkit Beta Site.”

Outside of this workshop, you will see different options depending on whether you are IP authenticated.

Timing Out

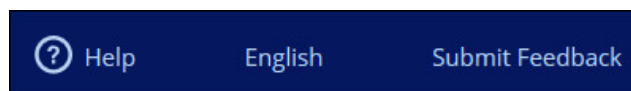
If you do nothing for 30 minutes, you will be automatically logged out. Currently, this time limit is independent of your subscription account settings.

When you are timed out, the page will change to say “Goodbye.” A hyperlink is provided that says, “Click here to return to the RDA Toolkit” is provided. However, this link will take you to the **original** Toolkit. To return to the **beta** Toolkit, click on the box that says “Explore Toolkit Beta Site.”

Interface and Navigation

Profile Toolbar

This is the dark blue bar at the very top of the Toolkit. The content of this bar varies, depending on whether you are logged in.



The “Help,” “English,” and “Submit Feedback” labels are always present as is the RDA Toolkit logo. See “Navigation Tips” for more information about the RDA Toolkit logo.

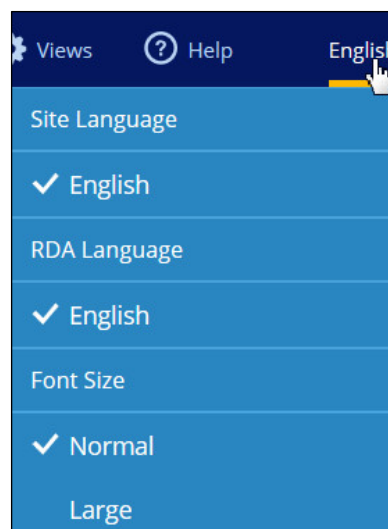
Help

This section contains help on using the beta RDA Toolkit. Some sections of Help are still being developed. Currently, help is only available if you are logged in to the Toolkit.

English

Hover your cursor over “English” to open a drop-down menu.

- **Site Language** is the language of the *website*, including RDA content. In the future, multiple languages will be listed.
- **RDA Language** is the language of the *RDA content*. After the new RDA is translated, there will be more language choices.
- **Font Size** allows you to easily increase the font size for the Toolkit. There are only two options; if you would like the font larger than “Large,” try the “Zoom” feature in the browser.



Submit Feedback

Click on this to open a form in a new window or tab to submit feedback on the 3R Project.

Once you are logged in, three additional icons appear in the Profile Toolbar. These features allow you to customize the Toolkit and access content you have created.



Bookmarks and Notes

Clicking on this icon opens your bookmarks and notes. A **bookmark** provides a link to a place in the RDA Toolkit and marks that place with the bookmark symbol. A **note** works similarly to a bookmark; it allows you to write a note that will appear when you hover over the note icon, and

to share a note with other Toolkit users. The original RDA Toolkit called both of these “bookmarks” but used different icons for them.

Documents

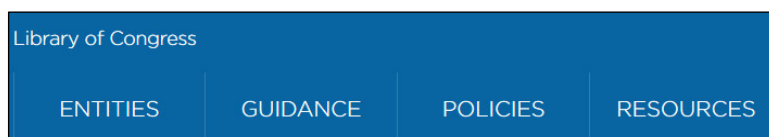
This section replaces the “Workflows” and “Maps” in the “Tools Tab” of the original Toolkit. From this section, you may view your current documents and create a new document. See “Documents” in Unit 4.

Views

This section contains many of the stored personalizations that were in the “Profile” area of the original Toolkit. See “Manage Views.”

Content Tabs

The four Content tabs are always present in the ‘medium blue’ banner below the Profile Toolbar. This banner will show your institution’s name and your profile name when you are logged in.



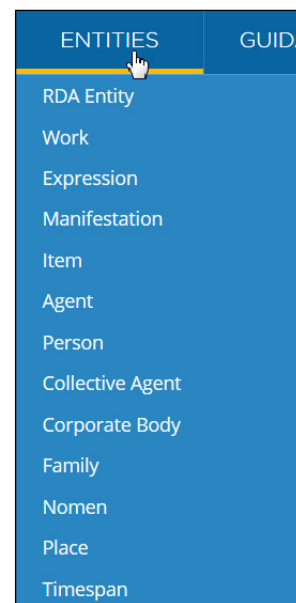
The Content tabs replace the “RDA” and “Resources” tabs of the original Toolkit Browse Tree. Each tab contains a drop-down menu, which you can view by hovering the cursor over the tab. Although you can *see* the menus when you are not logged in, you cannot *access* them unless the content is outside the paywall.

Entities

This menu contains all the RDA entities.

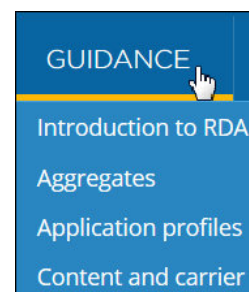
The first entity listed is RDA Entity. The other entities are listed in LRM order. To view an entity page, click on the entity name.

An entity page contains these sections for the entity: Definition and Scope, Prerecording, Recording, and Elements. Using a hyperlink in the Elements section is one way to access an element page. See “Navigation Tips” for more information about this section.



Guidance

This menu contains information and instructions that apply to all or several parts of RDA. General instructions about recording values for elements are located here. Instructions about a particular element are located in the recording section of that element.



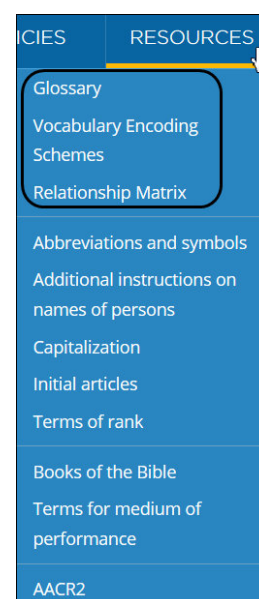
Policies

From this menu, all policy statements will be available for viewing in the Toolkit. Currently, only BLPS and LC-PCC PS are listed, and they do not contain real policy statements.

Resources

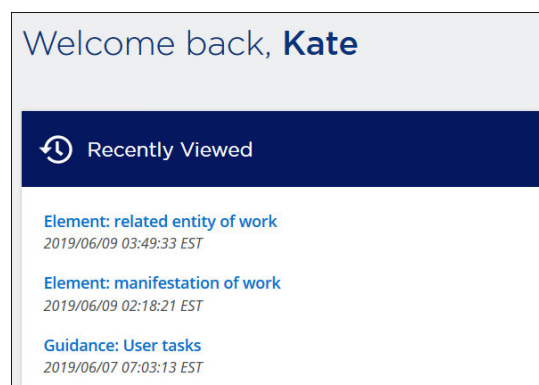
The content of the Resources tab is completely different from the content of the original Toolkit's Resources tab. This menu contains instructions that were in Appendixes, two items from the Tools tab, the Glossary, and two new items, (Vocabulary Encoding Schemes and Relationship Matrix)

- ***Glossary*** contains definitions for all entities, elements, RDA vocabulary terms, and other terms used in RDA (e.g., collective title)
- ***Vocabulary Encoding Schemes*** contains the terms and definitions for all RDA value vocabularies. The vocabularies are arranged by list, e.g., "RDA Media Type."
- ***Relationship Matrix*** contains the relationship elements and definitions organized by domain and range. *This is currently under development and may not provide accurate information.*



Recently Viewed

After you are logged into the Toolkit, a Recently Viewed box will appear below the "Welcome back" message. A hyperlinked list of pages you viewed in your last session or sessions appears here. Click on the hyperlink to return quickly to a page you recently viewed. The date and time you last viewed the page is listed below the page name.

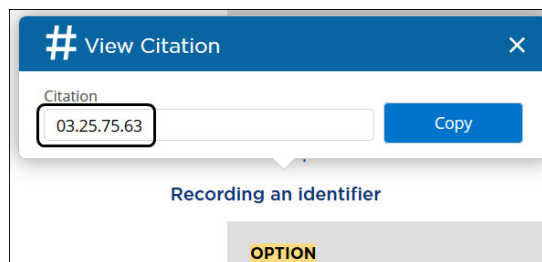


Citation Numbers

In May 2019, a new feature called “citation numbers” was added to the beta site in response to a user needs and feedback.

Citation numbers are

- permanent identifiers
- randomly generated in the format XX.XX.XX.XX
- searchable
- not instruction numbers
- a way to reference RDA instructions without using titles or hyperlinks.



Currently, the numbers appear only in Entity/Element and Guidance pages. Regardless of the type of search you select, searching for a citation number will take you to the section in RDA with that number, highlighting the section in yellow. See “Pop-Up Toolbar” for instructions on getting a citation number.

Navigation Tips

RDA Toolkit Logo

Clicking on the RDA Toolkit logo within the Profile Toolbar will return you to the Toolkit home page. This feature works regardless of whether you are logged in.



Breadcrumbs

For most Toolkit pages, a ‘breadcrumb’ will appear above the title, showing the hierarchy of the current page in relation to others. For example, if you are viewing the “Person” entity page, you will see only “Person” in the breadcrumb trail. If you view the page for the element “employer,” you will see “Person > employer” in the breadcrumbs above the element title because “employer” is an element of the entity “Person.” The breadcrumb labels are hyperlinked.



This breadcrumb trail does not provide a display for the order pages are viewed. Use the back button on your browser to return to the page you last viewed.

Up Arrow

You can click on this button to return quickly to the top of the page



Next Page and Previous Page Buttons

The RDA Toolkit is intended for use in a linear fashion. However, should you want to go to the next page of content, there are usually next page and/or previous page buttons at the bottom of the current page you are viewing.



Clicking on a Link

Click on a hyperlinked phrase to open the linked content in the main pane, replacing whatever page you were previously viewing (in this image, it is underlined for emphasis; in the Toolkit, it is not underlined, but appears in a blue font).



If you only want brief information and do not wish to navigate away from the current screen ...

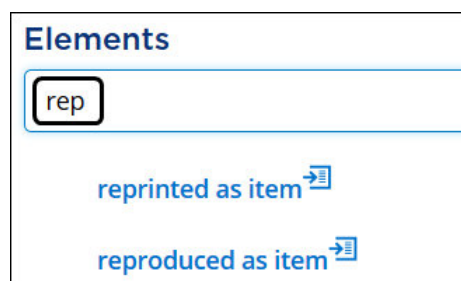
Preview Icon

Click on the Preview icon (outlined in this image) to open the initial part of the content in the preview pane (i.e., without replacing your current page).



Typeahead Searching for Elements

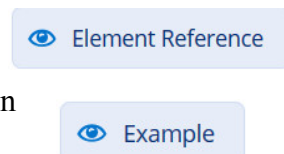
A ‘typeahead’ feature makes searching for elements on an entity page easier. Every entity page contains an alphabetical list of elements. As you start to type the name of an element, the Toolkit narrows the list to the terms that match. You can then click on the desired term without typing the rest of the term. Notice that the hyperlink and preview icon functions are available here.



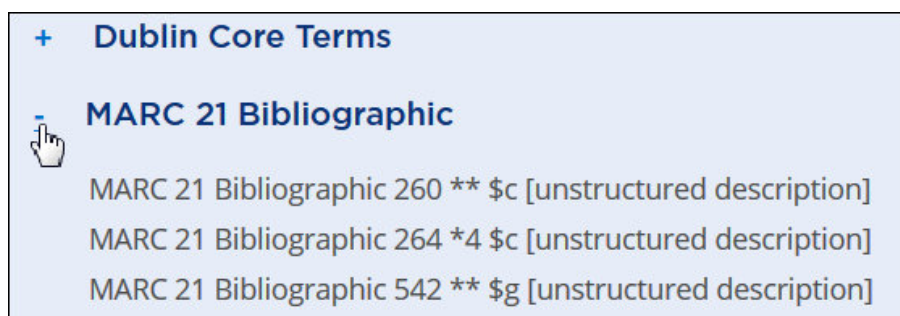
This search is left-anchored, so typing “access” will retrieve “access point for item,” but not “authorized access point for item.”

Collapse Boxes

The boxes that contain an eyeball will expand and collapse by clicking on the box. Expand the box to see the data, and then collapse it to see more instruction text on the screen without scrolling. These can be found in association with Element Reference and Example sections.

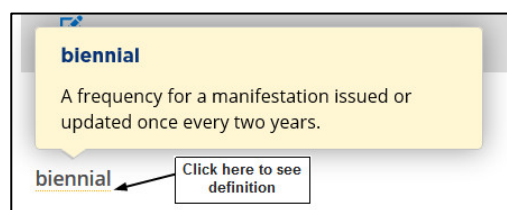


Within the Element Reference boxes, there may also be plus (+) signs indicating further data is available to view. Click on a plus sign to see the data and click on a minus (-) sign to collapse the data.



Pop-Up Definitions for RDA Terms

There are lists of RDA value vocabulary terms throughout the element pages (shown here is a portion of the list under “frequency”). These lists contain terms that have a dotted orange line (barely visible in this image). Click on the term to display the definition. Click again to close the definition.



The pop-up definition on an element page reproduces what you see in the Glossary entry, including *Use for*, *See*, and *See also* terms. Although these other terms have a dotted orange line, clicking on one will not open up another pop-up.

These terms and definitions are also available in the Glossary and Vocabulary Encoding Schemes sections, both located in the Resources tab. In these sections, the definition for the vocabulary term appears in-line with the term.

At the end of the Glossary entry’s definition, pop-up definitions are available for *See*, *See also*, and *Inverse* terms when provided.

There are no pop-up definitions in the Vocabulary Encoding Schemes section.

Relationship Matrix

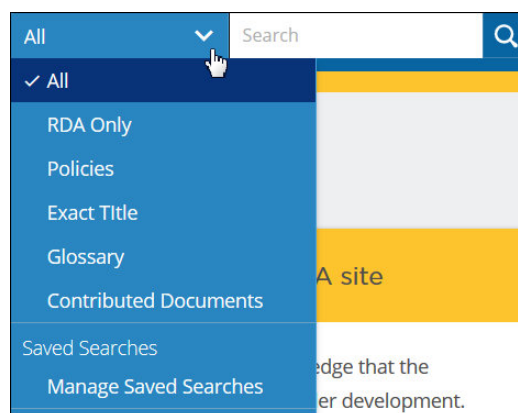
This part of the Toolkit is currently under development and should not be used now.

Searching

Note: Selecting a new search type and searching the same term does not currently work as expected. As a workaround, search for something else then try the previous term or log out and back in.

Search Box

The Search Box is located in the main menu bar, to the right of the Content tabs. The Search Box is always present, but you can only access search results if you are logged in. Shown in this image is an “All” search. Click on the drop-down arrow to select a different search option.



All

This searches all RDA Documents, Policies, and Contributed Documents to which you have access. Citation numbers are searchable using this search type.

RDA Only

This searches Entities (including elements), Guidance, and the top two sections of the Resources tab (Glossary through Terms of Rank). Citation numbers are searchable using this search type.

Policies

This feature is designed to search policy documents. Remember policy documents have not been added to the Toolkit yet!

Exact Title

This is a left-anchored search designed to take the place of the instruction number search. It will take you directly to an element, entity, or guidance page if you know the exact title. You can also use it to search an instruction number from the original Toolkit.

Note: Do not use quotation marks to perform an Exact Title search. If you search “access point for item” without quotation marks you will be taken directly to that page. If you search the same phrase with quotation marks, you will get the same results you would if you did an All search. This is because the quotation marks are

If there is no element or entity with the title you search, but the word does appear in the Toolkit, it will give you the search results you would have gotten with an All search. For example, if you do an Exact Title search for “Fotheringhay,” you get a list of eight search results because that word appears in an example eight times.

Glossary

This searches only the Glossary. Your search results will vary depending on the use of quotation marks. If you search “carrier type” with quotation marks, you get 52 hits and the term “carrier type” is the first hit. If you search “carrier type” without quotation marks, you get 54 hits and the first hit is “type of carrier.”

Contributed Documents

This feature is designed to search contributed documents to which you have access.

Saved Searches

Saved Searches are listed here. You can edit these by selecting “Manage Saved Searches.” You can save a search from the Search Results screen after you have performed a search. Because the Exact Title search is designed to bypasses the Search Results screen, this means you should not use “Save Search” for quick access to the “date of birth” page. Use a bookmark instead (see “Pop-Up Toolbar”).

Search Tips

- The Toolkit search does not use Boolean operators so adding them will not improve your search results.
- Searching is not case sensitive, e.g., “rda entity” and “RDA entity” return the same results.
- Do not use a wildcard as the first character in a search term.
- RDA Toolkit does not use the question mark (?) as a wildcard.
- *Searching with wildcard operators asterisk (*) and percentage sign (%) is currently under development and may not work as expected.*

Search Filters and Results Display

There is no “Advanced Search” feature that allows you to select a particular Content area of RDA in which to search.

The screenshot displays the RDA Search Results interface. At the top, the search results are for the query "title proper", showing 95 results. The left sidebar contains several filter sections: "Filter Results" with a "Refine Search" box, "Display Results" with a "Sort By" dropdown menu (currently set to "Relevance"), "RDA Documents" with a "Sections" list (All, Entities, Elements, Glossary, Guidance, Resources, Relationship Matrix), "Policies" (All, BLPS, LCPCCS_PS), and "Contributed Documents" (All, My Subscriptions, My Institution's Documents, All Institutions' Documents). The main results area lists several RDA documents, including "title proper", "parallel title proper", "title proper", "parallel title proper", "parallel title proper of", "later title proper", "earlier title proper", "parallel title proper of", "statement of responsibility relating to title proper", and "statement of responsibility relating to title proper". Each result includes a brief description and the date it was last updated.

But *after* you have search results, you can:

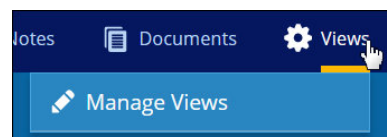
- Refine your results by adding an additional term in the “Refine Search” (for example, here we have 95 results for **title proper**; if you refine the search by inputting **parallel** in the filter results box, there are 39)
- Filter to search in particular sections of RDA
 - This filter is not as granular as you might wish. For example, you can only filter for “Entities,” not a particular entity, such as “Timespan”
- Display the search results by “Relevance” or “A-Z”
 - **Relevance** sorts results based on a combination of how many times a search term appears on a page and whether it appears in the title; there is a good chance that the results will not be listed in the order a cataloger would consider most relevant.
 - **A-Z** sorts results alphabetically by title.

Personalizing the Toolkit

Note: These features are still under development, so only a brief overview is provided.

Manage Views

Hover the cursor over “Views” in the Profile Toolbar, and then click on “Manage Views.” A page called “Saved Views” will open.



You can create multiple views associated with your profile, each with a title of your choosing.

You can create a view to choose:

- language
- which policies to display, including a primary policy
- which examples to show as open
- whether to display elements with the element reference always open.

 A screenshot of the 'Saved Views' configuration page. At the top, there's a 'View' dropdown set to 'My View'. Below this are three main sections: 'Settings', 'Policies', and 'Examples'.
 - 'Settings' includes 'RDA Template' (set to 'RDA Standard'), 'Language' (set to 'English'), and 'Access' (set to 'Private').
 - 'Policies' includes checkboxes for 'BLPS' and 'LCPCC_PS', a 'Primary Policy' dropdown set to 'LCPCC_PS', and a checked checkbox for 'Always open related policies with instruction'.
 - 'Examples' includes a checked checkbox for 'Show all' and several unchecked checkboxes: 'Basic', 'View as Relationship', 'View in Context', 'Recording Method', 'Unstructured', 'Structured', 'Identifier', and 'IRI'.
 At the bottom right, there's a 'Display' section with a checked checkbox for 'Always open element reference'. At the very bottom are 'Clone', 'Delete', and 'Save' buttons.

The most important settings in Saved Views are:

Language

English is the only choice now available, but this setting will be important when multiple translations of RDA are available in the beta Toolkit.

Access

For a personal profile, this will be set to “Private.” A later enhancement will allow institutions to create a view for their employees.

Policies

This allows you to select which policies you can view. The “Primary Policy” is the one that will automatically open if you select “Always open related policies with instruction.” For example, Library of Congress employees would select “LC-PCC PS” as their Primary Policy, but might also choose others, such as MLA BP.

Note: You can only have one primary policy, so you will have to switch back and forth in the preview pane to see policies of multiple agencies.

Examples

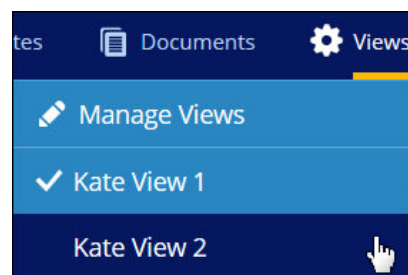
You can select which kind(s) of examples you want to see open when viewing a page. You can always close an example box in an instruction, so it is recommended that you set this to “Show all” while familiarizing yourself with the beta Toolkit.

Display

Checking the box allows you to have the Element Reference box always open when you view an element page. You can easily open and close the Element Reference box by clicking on the eye, so this setting is not that important.

Multiple Views

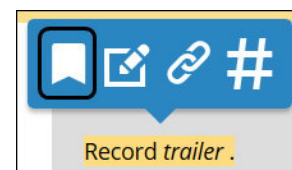
If you have multiple views, you can change which one you are using from the Views tool. Click on the view you want to change. The active view will be checked.



Pop-Up Toolbar

Creating a Bookmark

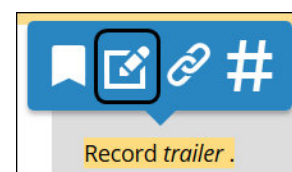
Highlight the text you wish to bookmark. On the Pop-up Toolbar, click on the bookmark icon on the left to open the “Add New Bookmark” dialog. Assign a good title to the bookmark so you will know what it is in the list of saved bookmarks. The title will display when you click on the bookmark icon in an instruction.



You can add a bookmark in a folder and select “Yes” to receive a notification when the *page* with the bookmark is updated (not the *text* where the bookmark is located – just the *page*).

Creating a Note

Highlight the text you wish to note. On the Pop-Up Toolbar, click on the note icon in the middle to open the “Add New Note” dialog. Assign a good title to the note so you will know what it is in the list of saved notes. The title will display when you click on the note icon in an instruction.



You can add a note in a folder, and select “Yes” to receive a notification when the *page* is updated (again, not the *text*, just the *page*).

The note has two features that the bookmark lacks:

Body

This box contains the note. The message you type in this box will show up when you click on the note icon when you see it in the instruction.

Access

This can be set to Local or Private. Local will share it with all Toolkit users in your institution. Private means only you can see the note. The default is Private.

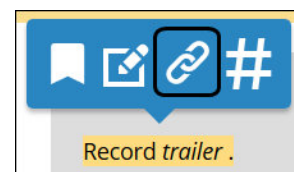
Creating a Link

Use this feature to

- email a link to a colleague
- add a link in a note
- add a link in a user-created document in the Toolkit
- add a link in a training document

For the hyperlink to work, the person clicking on the link must be authenticated in the beta Toolkit. This means they must be logged into their profile or via their institution. If they are not, they will go to the beta Toolkit homepage and **will not be redirected** to the link after they log in. So if someone sends you a link to the beta Toolkit, make sure you are logged in before clicking on it.

Highlight the text you wish to hyperlink. On the Pop-Up Toolbar, click on the hyperlink icon (resembles a chain link) on the right to open the “Create Link” dialog.



A URL is supplied for you.

Click on “Copy” to copy it to your clipboard.

Paste the URL into the email, document, etc., using the mouse or keyboard shortcut (Ctrl+V for PC and Command-V for Mac).

View Citation

To get a citation number, highlight the text for which you want a number. Then select the hashtag (#) in the Pop-Up Toolbar. If a citation number is available, a number will appear in the Citation box within View Citation. If a number is not available, the Citation box will say “no citation available.”

Accessing Bookmarks and Notes

Access your saved bookmarks and notes by clicking on “Bookmarks and Notes” in the Profile Toolbar. You can organize your bookmarks and notes in folders, if you wish. From the “Bookmarks and Notes” page, you can

- add a new a folder
- change the title of a folder, bookmark or note
- edit a bookmark or note, including changing the folder
- delete a folder, bookmark, or note

Deleting a folder deletes all it is contents!

Documents

You can create a document that you can use privately or share locally or globally.

The document Categories are Workflow, Map, Local Policy (not the same as Policies), Training Material, and Quick Reference.

This feature uses a simple HTML Editor, which also allows you to create links within the document and to add links to RDA content.

The screenshot shows the 'Create New Document' interface. It features several input fields and dropdown menus for document metadata: Title, Language (Abkhazian), License (CC BY), Version, Author(s), Category (Workflow), Date (01/11/2019), and Access (Private). There are also buttons for '+ Add Author', '+ Add URI', and '+ Add File'. The main content area is a 'Body' text editor with a rich text toolbar. A red box highlights the toolbar, which includes options for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and other formatting tools.

You can subscribe to a document created by someone else if it is shared with you. If you subscribe to a document, you will see notifications about it in the Documents menu.

If you want to allow someone else in your agency to edit a document you created, you may add that person by choosing their name from the drop down menu, clicking on “Add Author,” and then clicking on the “Save” button. Only one person shows up as an author in the document list, but their name will show up in the document editing pane.