

# **Using the Beta RDA Toolkit**



**RDA Toolkit Redesign Workshop  
ALA Midwinter  
Seattle, Washington**

**January 25, 2019**

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## Unit 1: Getting Started

### Beta Toolkit Quick Facts

- has responsive design so it can be used on tablets
- is designed to meet World Wide Web Consortium (W3C) accessibility guidelines
- provides multiples ways of finding content
- will contain RDA, policy statements, supplemental resources, and user-created content

### Accessing the RDA Toolkit Beta Site

There are three ways to get to the beta site:

#### Use the URL

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

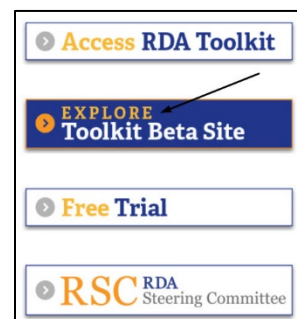
#### Link from the Original Toolkit (access.rdatoolkit.org)

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.



#### 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.



### Login and Authentication

#### Single Login

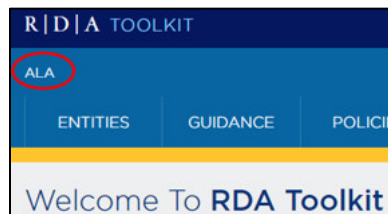
The single login method is the most efficient way to access the beta site if you are not IP authenticated. You must have a user profile to do this. Type your profile username and password in the boxes at the right. The Toolkit will automatically recognize your institution from your username.

After you enter your profile username and password, the welcome message will change from “Welcome to **RDA Toolkit**” to “Welcome back, [Your Name]” and the profile icon will show your name.

## Authenticating Subscriptions in the RDA Toolkit Beta Site

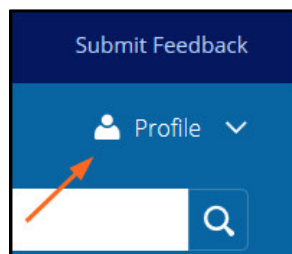
In the original Toolkit, you could either: a) be authenticated automatically through your IP address, or b) log in with your institution's account name and password to be authenticated. You knew you were authenticated if your institution's name appeared in the top-right corner of the Toolkit.

In the beta Toolkit, you can still be authenticated through your IP address or by logging in with your institution's account name and password. You know you are IP authenticated when your institution's name appears in the top-left medium blue bar, underneath the RDA Toolkit logo.



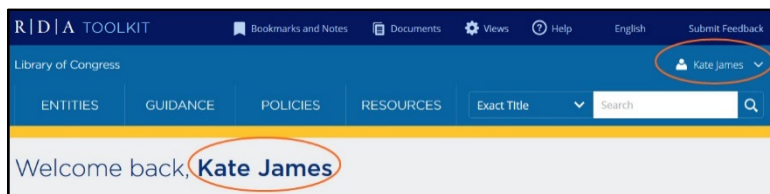
## Profile Username and Password

If you are IP authenticated, you will see a dark blue “Profile Login” box. At this point, you will also notice that the “Profile” icon in the right corner of the medium blue bar just says “Profile.” You can begin using the Toolkit, or enter your profile name and password to access your profile.



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 in “Full Name” 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.

### 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

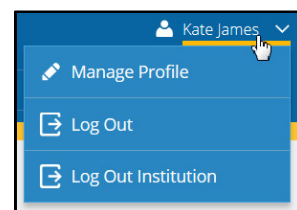
Currently, it is easier to change or create a user profile in the original Toolkit site then use that information to log into the beta site. If you need to create a profile or change your profile name, it is suggested that you use your email address as a profile name to avoid potential duplication with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

### Forgot Password?

If you forgot your profile password, click on “Forgot Password?” Currently, it takes you to the email reminder page in the original Toolkit; eventually. Follow the instructions to receive your password via email.

### Logging Out

To log out intentionally, click on the drop-down menu next to your profile name, and then on one of the two log out options.



### Logging Out with IP Authentication

If you **have** IP authentication, these options work differently. “Log Out” logs you out of your profile, but keeps you logged in through your institution. “Log Out Institution” overrides the IP authentication to completely log you out of the Toolkit.

### Logging Out without IP Authentication

If your **do not have** IP authentication, these options work the same way. Selecting either option logs you out completely.

After you have logged out, the page will change to say “Goodbye” and provides a hyperlink to return to the login page.

### 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.

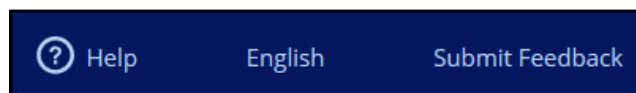
If you have timed out of the beta site, there is no obvious way to log in again. Instead of a “Goodbye” message with a hyperlink you will get a “Subscribe” message with no hyperlink. You must click on the RDA Toolkit logo in the upper left to return to the login page and start a new session.



## Unit 2: 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.

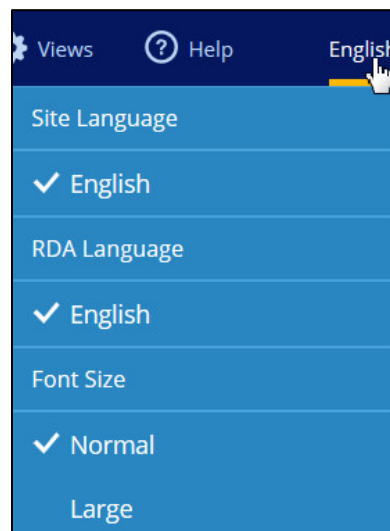
#### Help

This section does not contain any content yet.

#### English

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

- **Site Language** is the language of the *website*. 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

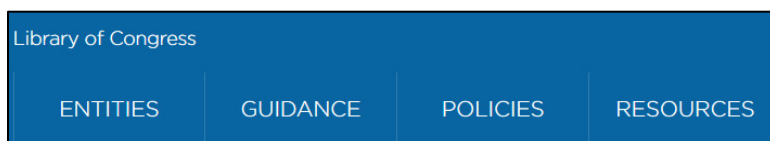
This section replaces the “Workflows” and “Maps” in the “Tools Tab” of the original Toolkit. From this section, you may view your current documents and create a new document. See “Documents” in Unit 4.

## Views

This section contains many of the stored personalizations that were in the “Profile” area of the original Toolkit. See “Manage Views” in Unit 4.

## Content Tabs

The four Content tabs are always present in the ‘medium blue’ menu bar. This bar will show your agency’s name and your username when you are logged in.



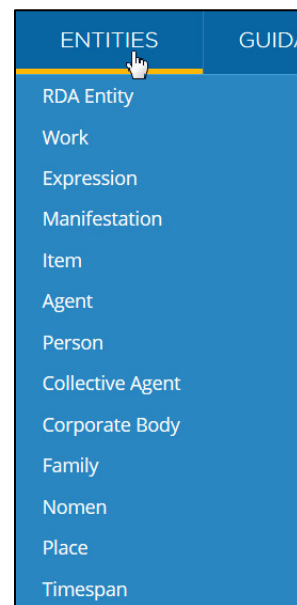
The Content tabs replace the “RDA” and “Resources” tabs of the original Toolkit Browse Tree. Each tab contains a drop-down menu, which you can view by hovering the cursor over the tab. Although you can *see* the menus when you are not logged in, you cannot *access* them unless the content is outside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

## Entities

This menu contains all the RDA entities.

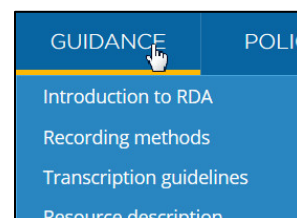
The first entity listed is RDA Entity. The other entities are listed in LRM order. To view an entity page, click on the entity name.

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.



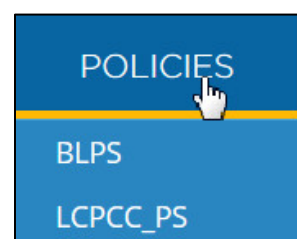
## Guidance

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

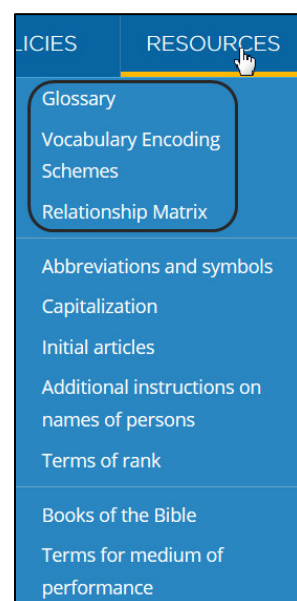
From this menu, all policy statements will be available for viewing in the Toolkit. Currently, only BLPS and LC-PCC PS are listed, and they do not contain real policy statements. There is some test content provided to give beta site users a feel for what the policy statements will look like.



## 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.



## Navigation Tips

### 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).

#### Recording an identifier

Record an identifier as Work: [identifier for work](#) 

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).

#### Recording an identifier

Record an identifier as Work: [identifier for work](#) 

### 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.

#### Elements

aut

[author of](#) 

[authorized access point for agent](#) 

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

### Collapse Boxes

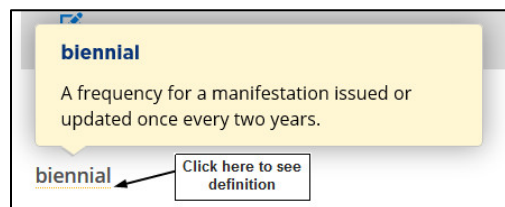
The buttons that contain an eyeball will expand and collapse by clicking on the button. Expand the box to see the data, and then collapse it to see more instruction text on the screen without scrolling. These can be found in association with Element Reference and Example sections.

 Element Reference

 Example

### 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

If you know the domain and range of a relationship element, the Relationship Matrix can be used to find the element name, definition, and inverse element. The Relationship Matrix is located in the Resources tab.

In the Relationship Matrix, entities are listed alphabetically (meaning Agent is first) with a grouping by domain and range. For example, “Agent to Expression” means the elements with a domain “Agent” and a range “Expression.” There is no preview icon feature in these lists so clicking on “Agent to Expression” replace the Relationship Matrix main page with the “Agent to Expression” page listing all those elements.

Clicking on the relationship element link will open up the element page. However, clicking on the link for the inverse element will NOT open up that element page. Instead, it will take you to the page within the relationship matrix for that element. For example, if you click on the inverse element “abridger” listed for “abridger of,” the “Expression to Agent” page will open up with the term “abridger” at the top of the screen. You must scroll up to see the “Expression to Agent” title, which indicates where you are in the Toolkit.

## Unit 3: Searching

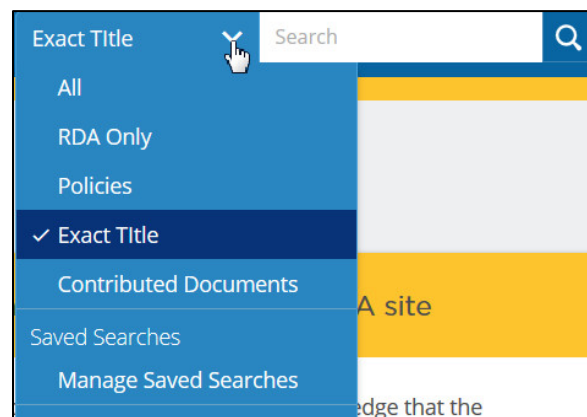
**Note:** There are currently some problems with the search features, so what follows is fairly rudimentary. Among the current problems is an issue with searches in quotation marks. For now, it is suggested that if you search in quotation marks for a known phrase in the Toolkit and get no hits, try again without the quotation marks.

### 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 a search for “Exact Title.” Click on the drop-down arrow to select a different search option.

#### **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.



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.

#### **All**

This searches all RDA Documents, Policies, and Contributed Documents to which you have access.

#### **RDA Only**

This searches RDA Documents.

#### **Policies**

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

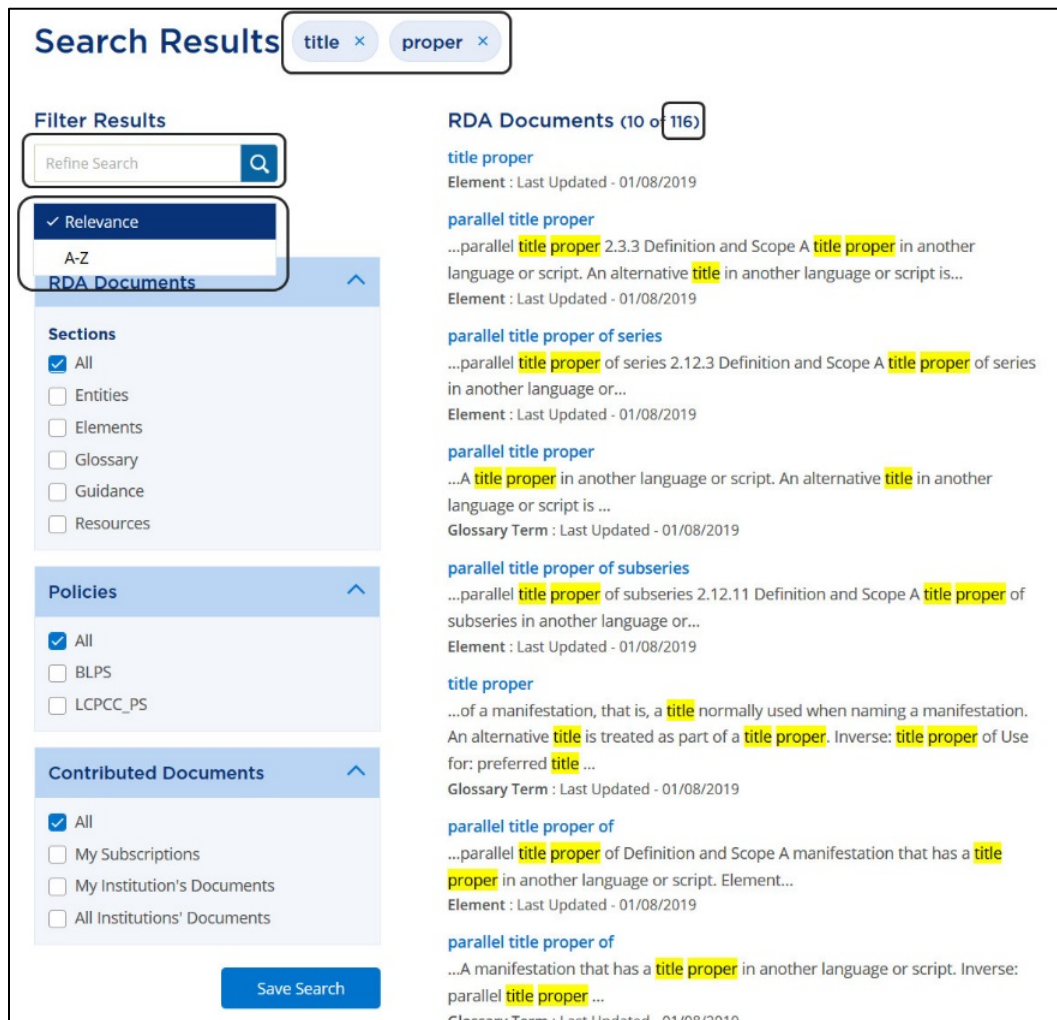
#### **Saved Searches**

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 “Bookmarks, Notes, and Links” in Unit 4).

## 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.



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 116 results for **title proper**; if you refine the search by adding **parallel**, there are 51)
- 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.

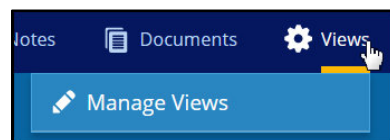
There is no way to exclude examples from search results, as in the original Toolkit.

## Unit 4: 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
- whether to display elements with the element reference always open

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

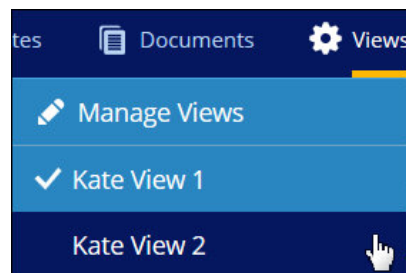
You can select which kind(s) of examples you want to see. You can always close an example box in an instruction, so it is recommended that you set this to “Show all.” If you do not select “Show all,” you will not know what kinds of examples are available for an instruction (this feature is not currently operational).

## 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 (this feature is not currently operational).

## Multiple Views

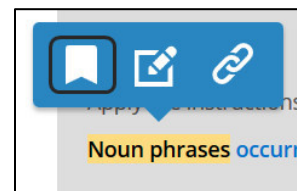
If you have multiple views, you can change which one you are using from the Views tool. Click on the view you want to change. The active view will be checked.



## Bookmarks, Notes, and Links

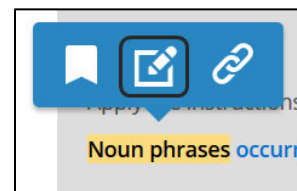
### Creating a Bookmark

Highlight the text you wish to bookmark. On the Link Bar, 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 Link Bar, 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 Local so do not forget to change it when creating private notes.

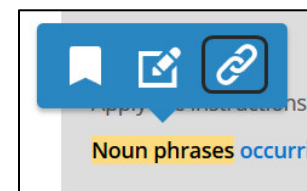
### **Creating a Link**

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 Link Bar, 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).

## 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 (set to 'Abkhazian'), License (set to 'CC BY'), Version, Author(s) (with a 'Category' dropdown set to 'Workflow' and a 'Date' field set to '01/11/2019'), Access (set to 'Private'), and abbreviated title. There are also buttons for '+ Add Author' and '+ Add URI'. Below these fields are sections for 'URIs' (with a '+ Add File' button) and 'Files'. At the bottom, there is a rich text editor for the document body, with a toolbar showing various formatting options like bold, italic, underline, and link.

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.