



This handout offers tips for educators and trainers who plan to incorporate RDA into a course or training program on knowledge organization, metadata schemas, or resource description (including cataloguing).

For questions or comments about this handout, email the author at elisa@rdatoolkit.org.

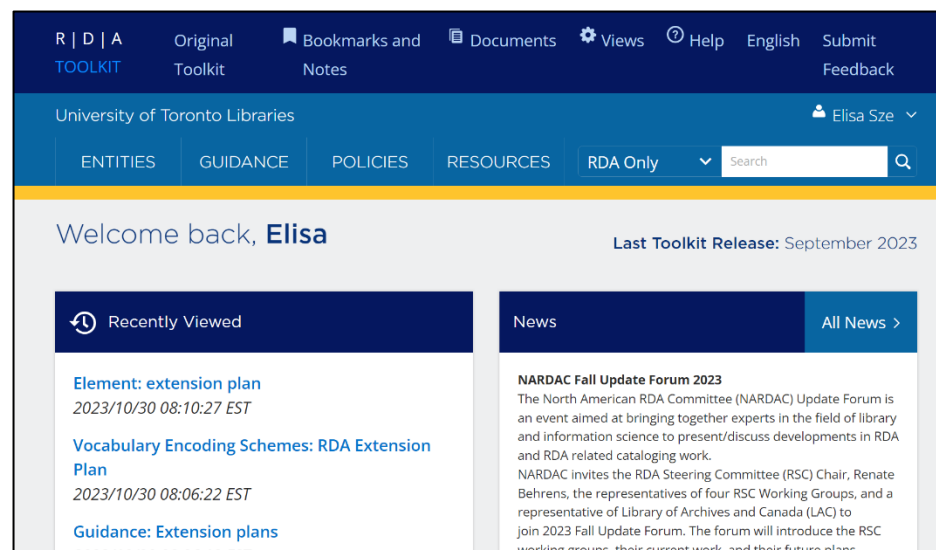
Contents

Why teach RDA?	1
Pedagogical approaches	2
Navigation.....	3
Citation	3
Elements.....	3
“Where did the rule go?”	3
Deciphering the hierarchy of entities and elements	4
“What will my data look like?”	4
Menu bars.....	5
Application profile	5
Terminology	6
Guidance menu	6
Helpful resources	6

RDA Teaching & Training Tips

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Why teach RDA?

RDA is a package of data elements, guidelines, and instructions for creating library and cultural heritage resource metadata that are well-formed according to international models for user-focused linked data applications. RDA is both backwards compatible and future facing because it can be used in many data environments to produce flat file data, bibliographic/authority data, data in relational/object-oriented databases, or linked open data. Since 2010, RDA has been adopted in 6 continents, and remains an important standard for libraries.

RDA is regularly updated and accessed through the official RDA Toolkit. Users of the original RDA Toolkit (2010-2020) will find that the architecture of the site has changed, but the resulting RDA data will look nearly the same. As Chris Oliver states in *Introducing RDA: A Guide to the Basics After 3R*, “**RDA in the original RDA Toolkit and in the new RDA Toolkit is fundamentally the same. It is developed following the same objectives and principles. There are new aspects, but it also continues to support the same ways of working as in the original RDA Toolkit**”.¹

The official RDA Toolkit complies with current web accessibility standards while improving maintenance of the standard. The alignment with IFLA’s Library Reference Model (LRM), which superseded the Functional Requirements models, and internationalization efforts have contributed new concepts and terminologies to RDA, but the essence of RDA is unchanged.

¹ Chris Oliver. *Introducing RDA: A Guide to the Basics After 3R* (Chicago: ALA Editions, 2021), vii.

Pedagogical approaches

Questions to consider: Are you teaching new or experienced cataloguers? What balance of theory and hands-on practice will you offer in the available timeframe? Will learners need advanced training customized for specific resource types and data environments?

Courses that emphasize theory: Introduce LRM, a conceptual entity-relationship model of bibliographic data that is available in multiple languages. Cite RDA as an example of a real-world implementation of LRM:

- Except for the top-level entity *Res*, all other LRM entities appear in RDA.
- LRM entities are described by attributes and relationships; in RDA, these properties are called elements. RDA has additional elements that expand upon LRM.
- LRM attributes or relationships are expressed as a literal or a URI; in RDA, elements can be recorded as unstructured description (a literal), structured description (a literal), identifier (a literal), or IRI (an extension of URI).

Courses on metadata schemas and systems: Introduce LRM. Show students the RDA Registry, the source of RDA Toolkit data for elements, controlled terminology labels, definitions, scope notes, translations, and mappings. RDA Registry provides:

- RDA element sets and vocabularies in Resource Description Framework (RDF)
- Alignments with Dublin Core, LRM, ISBD, MARC 21 formats, and RDA/ONIX Framework
- Development of an alignment with BIBFRAME is on the latest RSC Action Plan.

RDA Registry presents entities as “classes” and elements as “properties”. For an introduction to RDA data as linked data, watch “Building for the future: Linked Open Data and RDA”, by Damian Iseminger, RSC Technical Team Liaison Officer, on the RDA Toolkit YouTube channel. Note that the RDA Registry itself does not provide instructions or guidance on resource description.

Courses that offer hands-on practice in resource description and metadata creation: By using the RDA Toolkit, students engage with a real-life standard while simulating the decision-making processes that cultivate cataloguer’s judgment.

- If you plan to use the RDA Toolkit for less than a 30-day period, register for a free trial. If you teach in a formal Library and Information Science (LIS) education program and you plan to use RDA Toolkit for longer than a 30-day period, arrange for a classroom account with the publisher. LIS programs are eligible for deeply reduced classroom pricing.
- Teach students about LRM. It will help them understand the information architecture of the Toolkit and improve their ability to find instructions. Don’t overlook the Toolkit “Help” section or the Guidance menu either.
- Scaffold students’ learning: define the parameters that you want students to follow, and break instructions down into smaller steps. *See the rest of this handout for more tips.*

On-the-job training for cataloguing staff: Consider separate training plans for original cataloguers, copy cataloguers, and other staff users of bibliographic data.

- Try a “train the trainer” approach to distribute the workload and empower staff to become local experts.
- Situate training around a suitable application profile.
- Explain how to navigate the Toolkit, including when to look up supplementary documents to complement RDA instructions, be those policy statements, community resources, external metadata guidance documents, or local documentation.
- Demonstrate how to look up and apply recording instructions separately from the data environment, before incorporating examples within the data environment of your institution.

Navigation

There are benefits to teaching students how to navigate and maximize use of features in RDA Toolkit:

- Exploring features together helps students to visualize the placement of instructions and build muscle memory.
- For institutional account users, create “cheat sheets”, workflow documents, or other local notes within the Toolkit “Documents” area, with links to instructions. Students can refer to these documents when logged into the Toolkit.
- Refer students to these Help pages:
 - “Getting started”
 - “Navigating RDA Toolkit”
 - “Personalizing RDA Toolkit”. This page shows Toolkit users how to create bookmarks and notes.

Citation

There are several ways to cite specific instructions found on an entity or element page:

- Cite an element page by its element reference label.
- Link to a page by copying and pasting its unique URL.
- Link to specific passages within an entity or element page by highlighting a passage other than “Definition and scope”, then clicking the hyperlink button on the pop-up menu that appears. This link can be embedded into documents, learning management systems, emails, discussion boards, or online files.
- Create a citation number using the same pop-up menu. This feature helps instructors or trainers who create paper-based handouts or course packs. Students can find the passage by inputting the citation number into the Toolkit search box.
- Recorded demos can be found on the RDA Toolkit [YouTube channel](#).

Elements

Elements are properties of entities. Values of elements are recorded to describe a resource. Each element page in RDA Toolkit includes an “Element Reference” card that provides information about the domain of an element (that is, the entity described), the range entity (if the element is a relationship element), and mappings to other ontologies such as Dublin Core and MARC21.

Most recording instructions reside in the element pages. Instructions pertaining to an element supertype (that is, a broader element) apply “down” to its element subtypes (that is, its narrower elements).

“Where did the rule go?”

Access point construction

Communities have more flexibility to decide how access points should be constructed.

- RDA covers basic instructions on how to record elements that might appear as values within an access point.
- RDA does not impose string encoding schemes (that is, the exact sequence of values that make up an access point and how that sequence is to be formatted). Those are community decisions.
- Access point instructions originating from AACR2 are no longer part of RDA base text. The instructions have been preserved in the Community Resources area of the Toolkit.

Abbreviations

Communities have the flexibility to set their own instructions regarding the use of abbreviations. Abbreviations previously found in the original Toolkit have also moved to the Community Resources area of the Toolkit.

Relationship designators (Original Toolkit appendices I-J)

Element reference labels have superseded the need for separate relationship designators. Each RDA element uses a unique reference label. Nonetheless, when configuring the front-end/public display of a library catalogue, discovery layer, or search platform, some communities may choose to substitute the official element reference label with a term that is more familiar to their end users.

Deciphering the hierarchy of entities and elements

Agents

In RDA, the term “entity supertype” is synonymous with “superclass” and “broader entity”, and the term “entity subtype” is synonymous with “subclass” and “narrower entity”.

As with LRM, RDA introduces a hierarchical structure for the *Agent* entity, where *Agent* is a superclass, and *Person* and *Collective Agent* are subclasses. To maintain continuity with existing bibliographic practices, RDA further defines two subclasses of *Collective Agent*: *Corporate Body* and *Family*.

What this means: Attributes describing a superclass are generalizable to all subclasses under that superclass. However, the reverse is not true because attributes specific to a subclass do not necessarily apply to all the other subclasses under the same superclass.

For example, the element “language of agent” is used to describe the entity *Agent*. This element can be scoped more narrowly to *Collective Agent* (“language of collective agent”), *Corporate Body* (“language of corporate body”), *Family* (“language of family”), or *Person* (“language of person”). However, the element “category of government” is specifically scoped to *Corporate Body*, and cannot be generalized to describe *Agent*.

Choosing between broader or narrower elements

When presented with a choice of broader or narrower elements, cataloguing communities should choose the element to record based on how RDA is implemented within their data environment.

For example, when describing a *Work-Agent* relationship, a cataloguer may choose to record the element “creator agent of work” or be more specific about the role of the agent by choosing one of the element subtypes, such as “artist agent” or “author agent”, based on local policy. Communities that scope relationships to more specific entity subtypes may prefer to record the element subtypes “creator person of work” or “creator collective agent of work”. Some communities may simply ask cataloguers to record the element “related agent of work” without requiring more details.

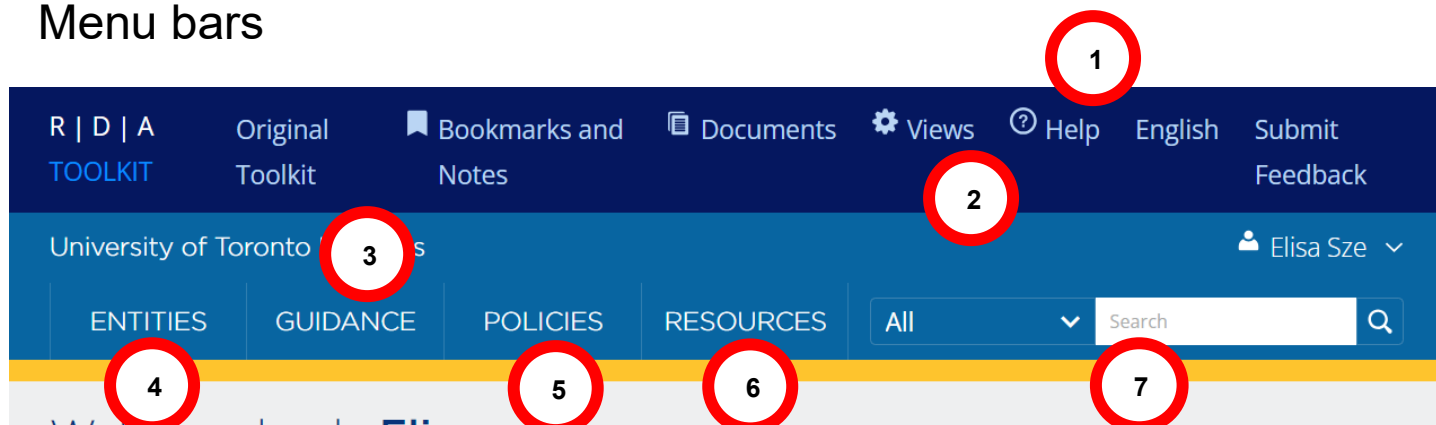
Elements that are subtypes of appellations (for example, elements containing the words “name of...”, “access point for...” or “title...”) can also have broader or narrower elements. When reviewing instructions for recording a narrower element within these hierarchies, RDA Toolkit will remind you to look up the broader element where more general instructions reside.

Note that in RDA, the term “element supertype” is synonymous with “broader element”, and the term “element subtype” is synonymous with “narrower element”.

“What will my data look like?”

How your RDA data looks will be determined by how the data is packaged, whether that be RDF, MARC21, or data encoded in another metadata scheme. Data produced with the official RDA Toolkit will not look dramatically different from data generated with the original Toolkit. However, the process of navigating for instructions will change. Communities are empowered to make decisions that are most appropriate to their needs while producing data that is compatible with RDA.

Menu bars



1. **Help.** Explains features of the Toolkit.
2. **Views.** Customize your view, choose which policies to display.
3. **Guidance.** Part of Official RDA base text. Explains theory. Offers “how to” instructions.
4. **Entities.** Part of Official RDA base text. Abstract classes used for talking about resources.
5. **Policies.** Look up British Library, LC-PCC, Music Library Association, or National Library of New Zealand policies. (More policies will be added when available.)
6. **Resources.** Access RDA Glossary, RDA Vocabulary Encoding Schemes (controlled vocabulary), and Community Resources (including legacy instructions that are no longer part of RDA base text)
7. **Search box.** Look up entities, elements, glossary terms, keywords, policies, community resources, even MARC21 tags and original RDA rule numbers.

Application profile

An application profile specifies the entities, elements, and vocabulary encoding schemes that are expected in a set of metadata. An application profile provides students with a structure or roadmap for resource description. An application profile can be as simple as a list of elements or as complex as a set of specifications for systems designer. It can also be adapted as a template for teaching purposes.

What can be included in an application profile:

- RDA elements to record
 - For each element listed, the recording method and transcription guidelines to follow
 - Vocabulary encoding scheme or string encoding scheme to apply for relevant elements
 - Whether an element is core
 - Whether an element is repeatable
- Policy statements to follow
- External guidance documents to consult in conjunction with RDA text.

Directing students to consult external guidance documents may offer pragmatic solutions to students' questions, but educators seeking to reduce cognitive load can also choose to create a supplementary document in the Toolkit “Documents” area for students. Choose elements that students are likely to encounter in a real data environment as a new professional.

Examples:

- Sample used in the ALA eCourse “A Practical Approach to New RDA” taught by May Chan & Elisa Sze, University of Toronto, Canada, in August 2022.
- Draft MLA Application Profile, Music Library Association, continuously updated.

- [Templates](#) from the OLA Super Conference 2023 pre-conference workshop. Although these are not application profiles, they set similar parameters for cataloguers.
- [Webinar example](#) provided by Melissa Parent, State Library of Victoria, Australia, October 2021.

RDA data can be visualized beyond the confines of an encoding scheme using the non-commercial third-party tool [RIMME](#) (RDA in Many Metadata Formats). A beta version, RIMMF6, implements RDA post-3R.

Terminology

RDA can be challenging to read because definitions and scope notes use precise technical language that is intended to facilitate unambiguous translation and communication across multiple languages. RDA uses terminology from LRM and RDF. RDA also preserves legacy terminology when it does not conflict with LRM. For example, “title proper”, “statement of responsibility”, and “identifier for manifestation” are among the terms used as element reference labels. The Guidance chapter “[Terminology](#)” is highly recommended for new official Toolkit users.

Guidance menu

An alternative “Orientation view” became available with the September 2023 update of the Toolkit. This view can be turned on to provide a thematic arrangement of the chapters under the Guidance menu. Guidance chapters fall into 3 main categories: those that explain critical information to help Toolkit users make sense of RDA text; those that provide instructions on how to examine and evaluate resources, make decisions about descriptions, and record values; and those that explain more complex concepts introduced by LRM or RDA. Consult Guidance chapters prior to teaching.

Guidance chapters **about RDA**:

- Introduction to RDA, and its subchapters
- Terminology
- User tasks
- Well-formed RDA
- RDA implementation scenarios
- Application profiles

Guidance chapters related to **implementation considerations**:

- Entity boundaries
- Recording methods
- Transcription guidelines, and its subchapters
- Data provenance
- Nomens and appellations
- Resource description, and its subchapters
- Content and carrier, and its subchapters
- Manifestation statements

Additional guidelines on complex topics:

- Aggregates
- Diachronic works
- Representative expressions
- Fictitious and non-human appellations

Helpful resources

[Introducing RDA: a guide to the basics after 3R](#) by Chris Oliver (ALA Editions, 2021)

[RDA Toolkit YouTube channel](#)

[RDA Steering Committee \(RSC\) Presentations](#)

[RDA-L](#) on ALA Connect

Connect with your [RDA regional representative](#) to learn more about recent RDA discussions and provide feedback to the RSC.

Contact [Elisa Sze](#), Education and Orientation Officer, for more ideas related to teaching RDA.