# RDA Toolkit Demonstration (Text version).

**Note: This is a text version of the Powerpoint presentation available at** <http://www.nla.gov.au/lis/stndrds/grps/acoc/trainmaterials.html>, **and can be used while viewing the live version of the Toolkit.**

## Overview

As you all know, RDA is the new standard that will replace AACR2 in 2013. However, unlike AACR2, which was published as a standalone print, and later, online set of instructions, RDA has been published primarily online as part of an integrated browser-based Toolkit that includes not only the text of RDA but also a variety of tools and resources that help you use and interpret and make use of RDA.

The RDA Toolkit was released in June 2010, and subscriptions are now available for institutions and individuals.

The aim of this presentation is to briefly demonstrate the Toolkit. You will learn how to access the Toolkit, learn how it works and how to navigate around it, and learn how to personalise the Toolkit and make use of advanced features.

This session will **not** teach you the structure of RDA or how to catalogue using it. Other training resources that cover these topics are available on the ACOC Website at: <http://www.nla.gov.au/acoc/rda-training-for-australia>. There is more information about these at the end of these notes.

## Access to the Toolkit

As with most of our cataloguing Tools, RDA is available by subscription. You can arrange subscription and get access to it via the RDA website, [www.rdatoolkit.org](http://www.rdatoolkit.org/).

(There are lots of things available on this website, and we will look at it in more detail later on. But for now, let’s look at subscription and access)

If you already have a subscription, you simply click on “Access the RDA Toolkit” to get started using the Toolkit. This button is present on every page on the RDA website, so you can access the Toolkit from wherever you happen to be on the site. Even if you don’t have a subscription, this “Access” link will still take you to the Toolkit, but you can only see a very limited view (Table Of Contents, MARC/RDA Mapping tools and a few of the “extra” resources)

### Subscriptions

To arrange a subscription, Click on “Subscribe” from the menu on the left. This is the subscription page and straight away you can see that there are two main types of subscription – Institutional, and Solo User. You can purchase them online from this page by clicking on the “buy” buttons for the one you want. You can also purchase offline, and instructions for this are available via the menu on the left.

Just a bit more information about what you get with each type of subscription.

**Solo user** subscriptions allow for one user at a time, and only one profile can be set up. (More about profiles later in the presentation). You will also have to manually login to your subscription each time.

**Institutional subscriptions** allow for multiple concurrent users (you buy however many you need), and within that subscription, unlimited individual profiles. With institutional subscriptions you can set them up to be manual login, IP authenticated, or authenticated via a referring URL. Ask your IT area which is the most appropriate for your institution. The National Library, for example, uses IP authentication, which means we don’t have to ask our staff to manually login every time they wish to use the Toolkit, unless they wish to set up their own profile, which I will explain about later.

There are also some other types of subscription, such as consortia/group subscriptions, and subscriptions for certain types of institutions/groups. Information about this can be accessed via the menu on the left.

### Consortia and group subscription

For groups of libraries wanting to band together, they are also open to consortia/group subscriptions, for which you can contact them directly and discuss your needs.

### Training and classroom access

Finally, once you have your permanent subscription set up, you can negotiate with the publishers for extra users for a short period to allow for training and classroom access.

Access via Catalogers’ Desktop

### You can also access RDA via Catalogers’ Desktop. But you can only do this if you already separately subscribe the RDA.

### Also, in Catalogers’ Desk you do have access to the full Toolkit. You can only access the text of RDA, and link from it to the LC-PCC PS, which are also in Catalogers’ Desktop. The full functionality of the Toolkit, such as its search functions, other tools and resources and user-generated content are not accessible via Catalogers’ Desktop.

### Also, from April 2013, AACR2 will no longer be in Catalogers’ Desktop, so you will need a subscription to the Toolkit to see AACR2.

### Print RDA

There is also a print version of the text of RDA. This full-text print version of RDA offers an offline access point to help solo and part-time cataloguers evaluate and use RDA. It can also support training and classroom use in any size institution. An index is included.

The online RDA Toolkit is the preferred option for using the Toolkit as it will always be the most up to date, and also offers access to companion tools such as LC-PCC Policy Decisions, the full text of AACR2, Mapping to MARC and ISBD, and workflow tools. However, purchasing the print version offers an alternative for those unable to access the online version.

For Australian users, RDA in print can be purchased from Facet Publishing in the UK, and the details, including price, can be found at <http://www.facetpublishing.co.uk/title.php?id=7494&category_code=910>

Updates to the print version will be issued irregularly

### Once you’ve subscribed

Once you have a subscription, you simply click on the “Access the RDA Toolkit” button, which is present on every page on the RDA website.

You can also access your subscription directly by going to [http://access.rdatoolkit.org](http://access.rdatoolkit.org/). If you have an IP authenticated login, you will already be logged into your institution’s subscription. If not, or if you are accessing your institutional subscription externally, you will need to login manually.

### Welcome screen

Here is the welcome screen of the Toolkit, which you are taken to when you use the links above. If you have IP authentication, the user name of the subscription holder will come up in the top right of the screen. If not, you will have to log in, using the boxes that say “Account ID” and “Password”.

Now that we’re logged in, let’s have a quick look at the screen.

On the left hand side of the screen is the **Contents** pane, where there are three tabs giving you access to the **RDA** instructions themselves, as well as a range of **Tools** and **Resources** that both help you navigate RDA, and link RDA into other tools that you are using.

On the right of the screen is the document pane, where the information you have selected from the contents pane will be displayed. For now, we’re just seeing the “Home page”.

At the top of the document pane is what’s called the “User menu”. Here you will find the search buttons, and log-in boxes. The blank space on the left is used by the Toolkit as a sort of status bar, either when pages are loading, or to remind you of any changes you’ve made to the view of the text (more about this later)

I mentioned the log-in boxes. But wait a second – why are they still there? Aren’t we already logged in? Well, yes and no. You see, RDA is a customizable tool. If you are logging in using your institution’s login and profile, as I have done here, you can ALSO create an **individual** profile for yourself **within** that subscription, so that you can customise it for yourself. I’ll show you later on what you can do with your personal profile.

**NB** If you have a solo user subscription, you still need to create your “profile” separately, after you have logged into your subscription.

## RDA Tab

The RDA Tab contains the full text of RDA and is fully searchable and interactive. The RDA Toolkit is not meant to be read linearly, as was AACR2. As an online resource, it is designed to facilitate various means of finding the desired instructions: ‘jumping in’ via keyword searches, using the TOC to go directly to a known instruction, looking in the index or following internal links to related instructions.

**Using the Table of Contents**

Accessing RDA via the **Contents pane** is one way to get into RDA.

We are not going to talk in detail here about the Structure of RDA and how it is different from AACR2, but it will be useful as part of this demonstration to understand how the contents are structured at a broad level, so that you can navigate around the TOC. There are:

10 Sections, which contain

37 Chapters

Appendix, Glossary and Index

Each chapter is divided up into numbered parts and these are numbered subordinately to the Chapter.

Eg. 2.3.1 – Basic instructions for recording title

The “2” above, refers to Chapter 2, and not Section 2. This is because the Chapters are continuously numbered throughout RDA, so when quoting an instruction number, we don’t include the broader Section. They are just there to help you find your way around a bit better.

You can expand and contract the Table of Contents to see and navigate through the contents of RDA. Just click on “+” [arrow] to open up a section, and keep clicking on “+” until you come to the subsection you want. You can also click on “–” signs to close a section you no longer want to see in the **contents** **pane**.

When you mouse over a section, it becomes underlined, and if you click on it, the Toolkit will open that section in the **Document pane** to the right.

For example, under Section 1: Manifestations and items, click on **2: Identifying manifestations and items**, then **2.3: Title**.Instruction **2.3 Title** will come up in the Document Pane.

**A note about page loading**

Please be aware that when the text of RDA is loading, its background process is to go to the beginning of the section your destination page is in, before loading the page you have requested. Most of the time you won’t see this, but if the Toolkit is running a bit slow, you may see the beginning of the section pop up. Always check the blank space in the user menu, where it will say “Loading...” if it hasn’t finished yet.

### Finding your way around the Document pane

So now that we’ve found some of the RDA text, let’s have a closer look at the document pane.

**Menus**

Up the top of the screen you see can now see **two** menus. The top one is still the **“User menu”** I mentioned before, but now there’s one below it – called the “**Document menu**”. These are things you can do **within** the document now that you have it open in the screen.

Let’s just have a quick look at those menu icons. Some of the icons are self-explanatory, but some are not so. So here’s a quick reference for what the icons mean. I won’t go into each one in detail right now.

**User Menu Document Menu**

** **

Next Hit

RDA Quick Search “Go”

** **

Synch TOC (align Contents Pane with Document Pane)

Previous Hit

Advanced Search

** **

Log in to Personal Profile

** **

Return to Search Results

Create personal profile

** **

View Text

Email password for profile

** **

Print

Bookmarks

Support\*\*

Log out\*

** **

****

My profile\*\*

\*The “Log out” option is available whether or not you are logged into a personal profile, because it logs you out of the Toolkit, not just your personal profile. If you are on an institutional subscription, you should always log out if you plan to be away from your work for a while, so that your institution’s “concurrent user” numbers are freed up for other users.

\*\*Available only when you are logged into your personal profile

**“Page” numbers**

Next to the Document Menu on the left of the screen, there are series of numbers, with the number “2” in square brackets. The larger chapters of RDA load in sections, to allow for quicker loading. These number therefore indicate how many sections there are, and which section you are in (indicated by the square brackets). Click on the **red** **arrow** (previous page)at the left or the **green** **arrow** (Next page) at the right to navigate between the sections. This can be a quick way around, but you probably won’t know exactly which section the instruction you are looking for is in, so it is better to go through the Table of Contents if you are looking for a specific instruction. However, if you are reading through the text and come to the end of a section, you might wish to keep reading. In this case, click on the “next page” arrow at the top.

**Text area**

In the text area, you can see under the heading “Title” it says “Core element” in light blue. All RDA elements that are considered to be core parts of a description are indicated this way in the Toolkit. If there are special instructions relating to that core status, they will be included here, also in light blue. You should always take note of these when you see them.

You can also see that certain terms are highlighted in maroon, with a little arrow next to them. This indicates that this term is listed in the RDA Glossary, and by clicking on the link, you can go to the Glossary to see the definition.

And lastly, every time an RDA instruction is referred to, it is hyperlinked, so that you can go straight to that instruction if you need to.

**Examples**

If you go to the instruction at 2.3.1.6 (either by scrolling in the document window, or selecting it from the TOC), you can see how examples are displayed. **Note:** If the examples need explanation, the explanatory text is in slightly different font, below the example.

**Options, alternatives**

On this screen you can also see that RDA, like AACR2, has “options” where libraries, or cataloguers, can do some different things with the instructions, if it suits their situation. These are always marked in green, and provide either an alternative to the instruction, or the option to add or omit information the instruction would otherwise require you to record.

Note also the little green box with “LC-PCC PS” written in it, next to 2.3.1.7. This is a link to a “Library of Congress-Program for Cooperative Cataloging Policy Statement”. These statements are the equivalent of the current LCRI’s, and if you click on them, you will be taken to the Resources Tab, where you will see the LC-PCC PS on this option.

In the future, other policy statement sets may be loaded to RDA Toolkit, with a similar linking facility available. As other national libraries, and related groups, develop their own policy statements, the Co‐Publishers will work with them to embed their policy statements in addition to the LC-PCC PS. As more of these types of links become available, showing them all to all users would clutter the user interface. Therefore, it will hopefully also be possible to allow users to control which policy statements will be visible in their subscriptions, but for now everyone sees LC-PCC PS.

To return to where you were in the RDA text, simply click on the **RDA tab** in the **Contents pane** (**Note**: do not use your Browser’s “Back” button to do this. It will not work)

Back in the RDA Tab, there’s a few things you can do to change the view of the text.

**View text**

If you go to instruction 2.3.1.4, you will see a very long list of examples, which run off the bottom of the screen. Sometimes it would be nice to see past the examples to the next part of the instruction. The “View Text” menu icon (a page with a magnifying glass over it), allows you to change the view of your text, to hide the examples. So click on “Hide Examples” on this menu, and you’re still at the same instruction, 2.3.1.4, but the examples are gone.

[Note: sometimes the text of RDA does not properly re-adjust itself and you’ll find you’re no longer at the same instruction. Just use TOC to find your way back]

Note that when you do this, the word “Filtered” appears in purple in the “Status” area to the left of the User Menu, to warn you that you are not seeing a complete view of the text. To change it back to a full view, simply go back to the view text icon and choose either “show examples”, or “Unfiltered”. Note also that you can you change to abridged views of the text itself, such as only the Core elements, or a “Basic” view of RDA (similar to what we now know as the “Abridged” version of AACR2). If you are signed into your own profile and have set up “Bookmarks”, you can also hide these if you are a section of the text that contains them.

**Print text** 

You will be able to print RDA text chapter by chapter. You do this by clicking on “print text” in the document menu and a pdf of the chapter you are in will load in a new browser tab. Note, however, it is the whole chapter, not just the part of the chapter you are looking at. If you want to print a selection within a particular chapter, you have to find that section within the pdf and select the relevant page(s) to print, using normal printing functions.

It is also possible to use “Print selection” from your Web Browser’s Print functions, to print a highlighted selection of the text. Note, however, that because the instruction number is in a different frame from the text, it won’t be included in your highlighted text.

**Synch TOC** 

If you’ve been moving around RDA as we’ve just been doing, or come into the text from a set of search results, the text in the document pane may not correspond to where you started when you were browsing the TOC in the Contents pane. But don’t worry, the Toolkit automatically synchronises TOC to the text as you go, so that you can always see the instruction you have arrived at in its broader context.

However, if you have a personal profile, you can turn this function off. (I will show you how to do this later). If you have done this, you can manually synchronise the two by clicking on the “Synch TOC” icon.

The “Synch TOC” function works in other parts of the Toolkit too, but it is of most use with the RDA text.

[You may also need to use the manual Synch TOC if you have simply been scrolling through the text, rather than clicking on internal links or changing sections]

## Tools Tab

Now that we’ve had a look at the text of RDA itself, let’s see what else the RDA Toolkit has to offer. First let’s look at the **Tools tab.**

When you click on the **Tools tab** you get a different Table of Contents in the **Contents pane,** and the **Document Pane** will reset to the “Home page”

The tools on this Tab are here to help you interpret and understand the RDA instructions, as well as relate RDA to other cataloguing tools and systems. Let’s have a look at some of them.

### RDA Element set view

The Element Set View is a different view of the RDA instructions, according to element, and arranged under the FRBR and FRAD entities, with subgroups for Attributes and Relationships under each element. Throughout this arrangement there are links to the relevant RDA instruction number and clicking on these links takes you to the RDA content on the RDA Tab.

The Element Set view can help you relate RDA more directly to its FRBR/FRAD foundations.

### RDA Mappings

The RDA Mappings is one part of the Tools tab that will be very useful to cataloguers during the transition to RDA.

**RDA Mappings** map MARC21 fields to their corresponding RDA instructions, and vice versa. This will be a very handy tool while you are getting used to RDA. If you don’t know where to find something in RDA, you can look up the MARC field in this Map, and link across to the RDA instruction from there. Let’s have a go at this.

Again, using the “+” sign under **RDA mappings**, find and click on “MARC bibliographic to RDA mapping”. These documents don’t have detailed contents linking like RDA does, so when it comes up in the **Document pane**, scroll down until you get to **245** for **title**. You will see a blue RDA link there. Just click on the RDA link, and it will take you to the text of RDA at 2.3.2, which is the corresponding instruction.

**Helpful hint:** you can also use the Browser’s “Find” function to get around in the mappings.

Click on the Tools tab to get back to the Mappings. Now if you go to the “RDA to MARC Bibliographic Mapping”, you can do the reverse. Find the instruction you’ve just been looking at in RDA, and see what MARC field you can put the data in. You can even click on the MARC tag, and link from there to the MARC21 Website.

You will notice that you can do the same for MARC Authority Data.

**Warning:** While these mapping tools are very useful during the transition to RDA, be wary of becoming too dependent on them. The aim is to become used to RDA, so try just to use them as part of the learning process.

### RDA Examples

The Toolkit also now contains a set of examples that were created by JSC to show what RDA records look like. If you click on “MARC encoding” under “Examples of RDA records (JSC)”, a new browser tab will open to the RDA Website, which will link you to these example records.

The examples are for different formats of material, and types of authority records, and are displayed in RDA element format, and MARC coding format.

### Workflows

Workflows have the potential to be one of the most powerful tools in the RDA Toolkit. Workflows give Toolkit users the ability to create workflows to assist with cataloguing certain types of materials, and share this cataloguing knowledge and experience with others in a collaborative way. It also allows institutions to incorporate their own local policies and practices into workflows that all their staff can see and use.

To create and share your own workflows, you need have an individual profile set up and be logged into it. We will look at this later.

However, if someone has created a workflow which they have allowed to be shared “publicly” (that is, to every Toolkit user), or “locally” (that is, within your institutional subscription) these can be viewed without needing a personal profile. Click the “+” sign, go to “Global” or “Local” “workflows” to see the shared ones currently in the Toolkit.

They can be quite simple like the “LC Staff: Adding Attributes for Persons with Surnames and Given Names” example, which is just designed to highlight the key things to be kept in mind, including changes from AACR2. Here you can see how they have provided working links to RDA instructions.

There are also more complex or more detailed workflows, such as “LC Staff: Simple Book” (which is anything but a simple workflow!). This workflow was put together and shared by the staff at the Library of Congress during the testing of RDA. The creators made use of many of the tools available in the workflow editor, such as a linked Table of Contents (to help you navigate through the long workflow) and links to RDA instructions, other resources in the Toolkit, and even external resources such as websites.

### Maps

The Maps tools are a bit like the workflows. However, instead of being a workflow they are a bit more like the RDA Mappings we just looked at earlier, but are ones that libraries can create for themselves to map anything they use in their cataloguing tasks, to RDA instructions. As with workflows, you need to set up a personal profile to be able to create mappings, but any that have been shared publicly or within your institutional subscription are viewable without a personal profile.

Let’s look at a quick look at an example. Click on “DRAFT CONSER MARC TO CORE RDA ELEMENTS” to see a mapping from CONSER to RDA.

We will see how to create mappings in the “Personalising the Toolkit” section below

### Entity Relationship Diagram

If you’re into flow charts, **Entity relationship diagram** shows, in a flow chart, the entity-relationship modelling that is Toolkit is using “behind the scenes”.

### Schemas

The **Schemas** section is a place where schemas such as Dublin Core, Universal, or specialised schema, can be added to the Toolkit, then downloaded by users of the Toolkit. The main audience for these are likely to include database developers and IT staff.

## Resources

The **third** tab in the RDA Toolkit is the **Resources Tab.** This tab contains other resources that are useful to have to hand when using RDA. This is where the LC-PCC policy statements, that I showed you earlier, are placed.

You can also see listed here, under “Other resources” such tools as FRBR and FRAD, Dublin Core Metadata as well as MARC Standards and Cataloger’s Desktop. These are links to the websites containing these resources, or access to them.

The other resource here is AACR2. The full text of AACR2 has been loaded to the Toolkit, and has links to corresponding RDA instructions. This will be of great help cataloguers familiar with AACR2, during the transition to RDA. Let’s just have a closer look at this.

Again, using the “+” sign in the **Contents pane,** open up to the beginning of Chapter 3 of AACR2 in the **Document pane**. Under **3.0B2 Chief source of Information,** the blue “RDA” icon allows you to quickly jump to the corresponding place in RDA. So if you click on the link, the toolkit takes you into RDA where the relevant RDA instruction number **2.2.2.4** is highlighted in yellow to help you recognize which RDA instruction is related to the AACR2 instruction number we linked from.

Sometimes an AACR2 instruction is related to multiple RDA instructions. Go back to the Resources tab, and this time look up **4.1B2 Title proper.** In this example, when you click on the RDA link at 4.1B2, you are taken to a search results style page which displays the *multiple* relevant RDA instructions. Just click on the one that looks most relevant, and you will go to the RDA instructions.

## Searching

Now that we’ve seen what’s in the Toolkit, let’s have a look at how you can search the Toolkit.

### RDA Quick Search

You can do a quick search using “RDA quick search”. This Quick Search option is visible on the Document Menu, wherever you are in RDA. However, it is important to understand that **although** you can access the “Quick Search” function from any part of the Toolkit, it is only going to search the text of RDA in the RDA Tab. If you want to search other parts of the Toolkit, you need to use “Advanced Search”, which we will get to in a moment.

There’s a couple of ways you can use the Quick Search.

First, if you know the number of an RDA instruction, type it into Quick Search to go straight to it. Eg. Type 3.2 (the instruction for Media Type)

Next, we’ll try a Quick Search for “title proper”. **Note**: for phrase searches like this you should put the phrase in quotation marks to get the best results. This time there are lots of hits, so we get a results screen. Let’s just have a look at the results screen.

In the top of the screen you can see the total number of items found, and the number that are showing on the first page. It also tells you that the results have been sorted by relevance. You can change this to sort the results by “Document order” to see the results in the order in which they appear in RDA.

Just below that is a link that will take you directly to the results that were found in the Glossary and Index. Normally, these will file at the end of your set of results, so if you have a big results set, as we do here, this is a way to jump quickly to them.

In the results set itself, you will see little coloured icons appearing next to many of the results. The red “Basic” icon is for results from the “Basic version” of RDA (like the “Abridged editions” of AACR2). The blue icon appears next to results relating to RDA core elements. This is one way of directing your eyes to the most relevant results. On this page, they nearly all say “Core”, because the results set has been automatically sorted by relevance.

In the bottom right of the screen you can navigate to the next page, or to any page in the result set.

You can now click on the hyperlinked text of the result that looks relevant to you, (eg 2.3.2 Title proper) to go to that section of RDA.

The term/phrase you searched for will be highlighted in yellow wherever it appears. You can navigate through the results from here, by clicking on the Next and Previous hit ****icons that have now become active in the Document Menu. If you want to go back to your results list, click on “Return to results” icon ****

**Important:** If you were previously viewing a filtered version of RDA, you will still get a full set of results, but you will not be able to see the results that have been filtered out. RDA gives you a warning message when you try to look at these results, and your Status bar will also be showing that you are still seeing only a filtered view.

### Advanced Search

You can also do **advanced searching** by clicking on “Advanced search” icon in the **User Menu**. When the Advanced Search box comes, you will notice that the Status area on the User menu now says “Advanced Search”. Advanced search allows you to

* search the entire Toolkit, or selected parts of it.
* **limit** your search by type, or exclude examples.
* Search the text of RDA using an AACR2 instruction number
* Save searches (if you have a personal profile, which we’ll look at in a moment)

Let’s try a few different searches. First let’s try and search the **whole Toolkit** for the word “Scale” (as in the scale of a map or object). Type “scale” in the big box at the top. **Note:** if you have already been using “RDA Quick Search”, as we just did, your search string may appear in the search box here. To clear it, just overtype it or click on the “Clear previous search” icon 

Advanced Search defaults to only search RDA, so to search the whole Toolkit, we need to click on “Select all”  at the bottom of the list of documents. Then click on “Search” at the bottom of the screen.

You’ll notice that the result set not only contains RDA instructions, but also results from **AACR2** (from the **Resources** Tab) and the **RDA Element Set View** that’s in the **Tools** tab

Back in the **advanced search** screen, let’s try searching just RDA, and limiting the search to the “Core” instructions. Note that the term “Scale” is still visible in the search box at the top, so we don’t have to re-enter it.

1. Click the button under the “Select Documents” box to clear the tick boxes, and then select just “RDA”
2. Under “RDA instruction types”, choose “Core element instructions” from the first drop down list
3. Click Search

Notice that this time, our results are just from RDA, and they all have the little blue “Core” icon next to them.

I showed you just now how to access the text of AACR2 in the Resources Tab, and link from there to corresponding RDA instructions. But, in “advanced search”, you can also search the text of RDA using an AACR2 instruction number, because AACR2 instruction numbers have been embedded into the metadata behind the RDA instructions.

Type 1.4F1 in the “AACR rule number” box. This is the AACR instruction for recording date of publication.

**Note:** Make sure that the search box at the top is cleared from your previous search before you do this search.

Results show three instructions relating to recording imprint information. The second of these, 2.8.6.3 looks like the match you are looking for, so you can click through to the text from there.

Note that the AACR2 instruction number does not appear anywhere. It has been embedded in the metadata behind the RDA instruction, so is not visible. However, the yellow highlighting shows where the embedded AACR2 information is.

## Personalising the Toolkit

So now let’s have a look at how you can personalise the Toolkit and use some of its more advanced features. Throughout this demonstration I have often mentioned “personal” or “individual” profiles. So far we’ve seen the basic features of the Toolkit, and how to search it,when you are logged into your subscription account. But as I have indicated, you can set up personal profiles within this subscription account, in order to get access to some other features.

Creating your own profile****

To create your own profile, click on the “Create” icon in the **User menu** [circle], and simply enter your details in the box that comes up, under “Or you may create a new profile” and click “Create”.

The “profile name” is effectively your “user name” and is what you will use to login to your profile later. The reason you are asked for your email address is so that if you later forget your password, you can ask the Toolkit to email it to you.

Once you have a profile set up, you can simply log in to it anytime by typing your username and password in the boxes provided on the User menu. [arrow].

**Note:** This box will also come up if at any time you try to use advanced functions that require a log-in, and you haven’t logged in. That’s why you are given the option of simply logging in as if you already have a profile.

But for now, we are creating a new one, so fill in the boxes next to “Create”. The “profile name” is effectively your “user name” and is what you will use to login to your profile later. The reason you are asked for your email address is so that if you later forget your password, you can ask the Toolkit to email it to you.

Once you have a profile set up, you can simply log in to it anytime by typing your username and password in the boxes provided on the User menu.

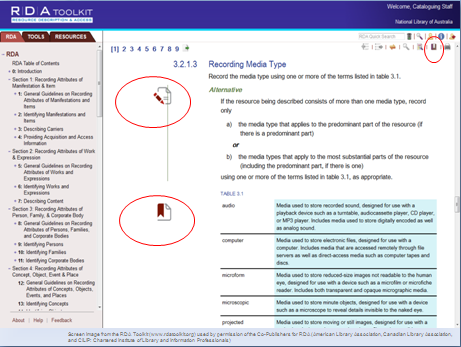
Now that you’re logged in, the username you specified should be appearing in the blue section at the top of the screen, above the institutional name. So now let’s look at one of the key advanced features we can now access.

Saved searches

First, let’s go back to advanced search for a moment. If you want to save a commonly used search, you can now do so, under your personal profile. **Before** you execute your search, type a name for it in the “Save search as...” box, and **then** simply execute your search. This will then save this search for later on so you can redo it. I’ll show you in a minute how to get to your saved searches.

Bookmarks ****

Another advanced feature is bookmarks. On the page shown below, you can see some little symbols that look like a piece of paper. These are “Bookmarks”.



When logged in to your personal profile, if you find a section you want to be able to get back to later, you can bookmark it, using the “bookmark” link in the **Document menu**. You’ll notice one of them has a pencil, and the other has a little ribbon.

You can either use bookmarks as just a place-marker, to make it easy to find this spot later on. These will show up with a symbol that looks like this:

****

Or you can use bookmarks to write “margin notes” for yourself. These bookmarks look slightly different:

****

The pencil indicates that there is text associated with this bookmark, and if you hover your mouse over this type of bookmark, the textual note will appear.

So let’s look at how to create and use these bookmarks. First, you need to find the section of RDA you want to bookmark. For the purposes of this exercise, let’s go to **2.12 Series Statement.** Now click on the “Bookmark” icon in the **Document menu**

You’ll get a “Manage bookmarks” window, which allows you to either add a new bookmark, go to an existing bookmark, or select a bookmark to edit.

Firstly, to create bookmark, click on the “Add” button

It takes you back to the **Document Pane,** and asks you to click in the document at the spot where you want the bookmark to be. Make sure you click near the text and not over in the very left margin. This area on the far left is outside the text frame, so it will not work.

When you’ve selected the spot, you get a box to fill in with the name of the bookmark (Required) and any annotation you might want to put with it (Optional). When you’re finished, click “Set”.You will be taken back to the document pane where your bookmark should now be appearing. If you hover over it, any text you entered in the “annotation” area will pop up.

And if you are somewhere else in RDA and want to find your way back to this spot, simply click on the **Bookmarks** in the menu, and from the window, select the name of the bookmark from the list under “Go to Bookmark...” and click “Go”

If you want to either move or delete a bookmark, select it from the list under “Select bookmark to edit...” and choose either “Reset” or “Delete Bookmark(s)”

**NOTE:** If you wish to change the title of your bookmark, or amend the note you have attached to it, you can’t do this at present. You need to delete the bookmark and re-enter it with the desired title and text.

This window can be a bit clunky to use to find your bookmarks. The “edit” box in particular, is not a drop down box, and it is very narrow, so if you have a lot of bookmarks, scrolling through this list is not very easy. So I’m going to show you another way to get to the bookmarks you’ve already created.

### Manage your profile

Up in the user menu, click on the yellow person icon, which is “My profile”

This window allows you to manage your profile and get access to all your saved searches, and any bookmarks and workflows you have created. You can also do things here like change your password and manage your Toolkit settings.

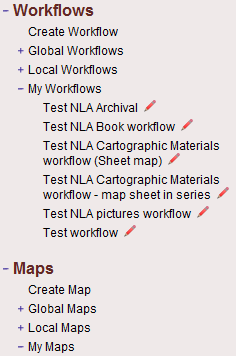
It is much easier to access your bookmarks and workflows from here, because it is a much bigger screen that is easier to move around than the one we just looked at. All the functions to Rename, edit, delete are available here too.

### Workflows/Maps

We had a quick look at user generated workflows and maps before when we were browsing the contents of the Toolkit. However, now that you have a personal profile and are signed into it, you have the ability to create and share your own workflows and maps. For the purposes of demonstration, we will focus on workflows, but the process works the same for Maps.

If you go to the Tools Tab and click on the “+” sign next to workflows, you will see that the “Create Workflow” and “My workflows” options are now active. The same is true under the “Maps” menu.

Under “My workflows” are all the workflows that were created in that profile. In the screen shot below is an example of how this looks.



The little pencils mean that these workflows were created under my profile, so I am able to edit them. By clicking on a pencil, I can get into the Workflow editor to edit the workflow.

**Creating and editing workflows/Maps**

We are not going to look at creating workflows and maps in detail today, but I’ll just show you the workflow editor and point out a few things.

When you first click on “Create workflow”, you will get this initial setup screen. Here you record the name of your profile, its author, and some other information about the workflow. You are also required to assign a Creative Commons license to your workflow. Note that you can either create one from scratch or copy an existing one.

It’s a good idea to put lots of information here, especially if you intend to share the workflow, because it will help others to identify who wrote it when.

Workflows are written using an HTML editor style “workflow editor”, which gives you some basic functions of MS Word (like fonts, highlighting, underlining, etc), as well linking functions so that you can link to other parts of the Toolkit (such as RDA instructions) and external resources like websites.

You can set whether or not you share your workflow and who you will share it with, by using the “Share mode” drop down box shown here at the top. “Share locally” means that only people within your subscription group can see it, and “Share globally” means it will be visible to all users of the Toolkit.

Using the linking tool, you can link to parts of RDA using the series of dropdown boxes provided to drill down to the exact instruction. You can also link to other parts of the Toolkit in a similar way, as well as externally to the web. If you look at one of the LC workflows in the Global list, you can see what all of these these links look.

More information about using the workflow editor is available in the Toolkit’s “Help” Section.

## Help, Feedback and other resources

Which brings me neatly to the final part of our Demonstration – how to get help and support when using the Toolkit.

In the bottom left corner of the RDA Toolkit, you can see three links. These links are visible in all parts of the Toolkit, and are your access point to information, help and support in the Toolkit

**About the Toolkit**

If you click on “About”, you will get a screen which tells you a bit about RDA. The reason I mainly wanted to point this screen out to you is because of the “RDA Toolkit Copyright Statement”. If you are planning to give training presentations using screen shots from the Toolkit, you need to read this section, to find out how you should acknowledge that usage.

**Help**

The Toolkit has its own help documentation, which is now quite extensive, and more is planned.

**Feedback**

Thirdly, there is also a mechanism for providing feedback or reporting issues with the Toolkit. Here you can also check the status of any previous “tickets” you have submitted.

### Other resources

All you need to know about subscribing to and using the RDA Toolkit is on the RDA Toolkit Website. Here you can get access to:

* Subscription information
* training resources, including Toolkit demonstrations created by the publishers, and short tutorial videos
* Information on developments and enhancements to the Toolkit.
* Blogs – general and development
* Virtual User Group

**RDA Toolkit Development**

The RDA Toolkit development page provides information about specific development proposals have planned for the Toolkit, and follow the progress of them. If you sign up to the Development Blog, you can also leave your comments against any of the development posts, to let them know what you think.

Information about when updates are released and what is in them will also be posted here. Update “Releases” will take place roughly monthly, and will usually consist of:

* Changes to RDA text
* Enhancements to the Toolkit
* Bug fixes

Note that you can also “follow” RDA on Facebook and Twitter.

**Virtual User Group**

Finally, there is an RDA Virtual User Group, which is an online interactive webinar focusing on development planning for RDA Toolkit. Meetings are held 3 to 4 times each year and at different times of day in order to facilitate live participation from users around the world. These sessions are free and open to everyone.

Notification of upcoming meetings will be posted on this site, as well as recordings of past meetings.

This Virtual User Group is focussed purely on the development of the Toolkit.

**ACOC Website**

The main information point about RDA in Australia is the website of the Australian Committee on Cataloguing (<http://www.nla.gov.au/acoc/resource-description-and-access-rda-in-australia>). This is where you will find all the most current information about implementation and training in Australia.

All training documentation created by the National Library of Australia will be made available on this website, including this presentation.

The ACOC website is also the place to go for information on how to suggest changes to the **text** of RDA. What you’ve seen up until now are all the mechanisms for proposing and keeping up to date with changes to the Toolkit product, but the responsibility for changes to the text of RDA remains with the Joint Steering Committee (JSC).

Australia is represented on the JSC by ACOC, so all proposals for change that come from Australia need to go through ACOC. Please visit <http://www.nla.gov.au/acoc/proposals-for-revision-of-rda> to find out more about how to do this.

## Acknowledgements

[http://www.rdatoolkit.org](http://www.rdatoolkit.org/)

Screen images from the RDA Toolkit([www.rdatoolkit.org](http://www.rdatoolkit.org/)) used by permission of the Co-Publishers for RDA (American Library Association, Canadian Library Association, and CILIP: Chartered Institute of Library and Information Professionals)

Also consulted:

*Library of Congress Training for RDA: Resource Description & Access : Using the RDA Toolkit : Revised for the Toolkit release of May 8, 2012 For use by non-LC staff* Prepared by Tim Carlton, Cooperative and Instructional Programs Division with the assistance of Kate James and Judith Kuhagen, Policy and Standards Division, Cooperative and Instructional Programs Division Library of Congress. June 2012 <http://www.loc.gov/aba/rda/>

*RDA Toolkit Essentials* Presented by James Hennelly, ALA Digital Reference American Library Association, May 16, 2012 (<http://www.rdatoolkit.org/essentials>)