

To: Joint Steering Committee for Development of RDA
From: Kathy Glennan, ALA Representative
Subject: Referential relationships: RDA Chapter 24-28 and Appendix J

Related documents:

[6JSC/TechnicalWG/3](#) Recommendation 2

6JSC/ALA/41, Additional instructions in Chapter 27 for Structured Descriptions of the “Contained in” and “Container of” Relationships

Abstract

Revise Chapters 24-28 and add new relationship designators to Appendix J to accommodate referential relationships between a resource and a description or enumeration of that resource contained in another resource such as a bibliography or catalog.

Justification

At its meeting in November 2014, the JSC accepted [6JSC/TechnicalWG/3](#) and [6JSC/ALA/31](#) to establish subject relationships in RDA in alignment with FRSAD and the anticipated consolidation of the FR models. As a result, the descriptive relationships among WEMI entities previously given in RDA Appendix J.2.3, J.3.3, J.4.3, and J.5.3, and examples thereof in Chapters 25-28, have been deprecated in favor of subject relationships in Chapter 23 and Appendix M.

However, [6JSC/TechnicalWG/3](#) Recommendation 2 acknowledged the potential complication these changes posed for the long-standing practice in rare materials cataloging of making references to published descriptions or enumerations such as those found in bibliographies or catalogs. *AACR2* 2.18C, *DCRM(B)* 7B14, and the other published *DCRM* manuals all give instructions for recording such references. The MARC to RDA bibliographic mapping connects RDA 25.1 (Related Work) with MARC Field 510 (Citation/References Note).

ALA agreed to develop a follow-up proposal to address this complication, relying on the expertise of its Rare Book and Manuscripts Section (RBMS). In anticipation of this proposal to add designators for referential work relationships, the JSC agreed to add placeholders to RDA Appendix J.2.3, J.3.3, J.4.3, and J.5.3 in April 2015.

In evaluating [6JSC/TechnicalWG/3](#), the ALA rare materials cataloging community expressed substantial resistance to characterizing the relationship between a resource such as a bibliography

or catalog and the WEMI it describes as a subject relationship.¹ While there may or may not also be a descriptive or subject aspect to the relationship, the rare materials community emphasized distinct functions and user tasks supported by the referential relationship, including identification, justification of data elsewhere in the description, and user convenience. A typical rare materials reference precisely relates the described manifestation or item to a specific entry or location in the referential resource, frequently identified by a citation number, identifier, or designation of volume, part, and/or page.

Library catalogs, auction and dealer advertisements, specialist and scholarly literature, and reproduction services have long relied on these standardized references or citations as a form of identifier for manifestations and items for a variety of reasons. Early printed materials generally lack other standard identifiers such as ISBNs. Due to variations in production and subsequent treatment of early printed materials, it can be especially challenging to identify distinct manifestations, and to assess the completeness of copies of that manifestation. Users interested in these material aspects may be further challenged by limited access to copies or reliable surrogates. Additionally, descriptions of these resources may vary widely in descriptive standard, format, mode of issuance, language of cataloging, level of detail, and audience. References to standard descriptions can help overcome these ambiguities and assist with a variety of user tasks.

While subject relationships as defined in RDA are restricted to the domain of Work, the numbering or sequencing of entries within a bibliography or catalog—and the information contained in those entries—may change significantly in new editions or in translation. For this reason, expressions are generally the fundamental unit of reference in *Standard Citation Forms for Rare Materials Cataloging* (SCF).² Further, references may also point to a page number or URL in a specific manifestation. Though unlikely, it is conceivable that a reference could even point to an item (e.g., an annotated copy of a catalog, a hand-written inventory, etc.). While rare materials cataloging focuses on manifestations and items, works and expressions certainly have referential relationships to other resources as well. However, RDA 24-28 and Appendix J only accommodate descriptive relationships between two entities at the same WEMI level. Currently, the only possible cross-entity WEMI-WEMI relationships are the “primary” WEMI relationships (Chapter 17) and Work-to-WEMI subject relationships (Chapter 23). ALA notes that a similar limitation is not present for agent-to-agent relationships (see Chapter 29).

Current practice in the U.S. rare materials cataloging community conveys references in notes. The source being cited is identified by a standard abbreviation or a citation form as established and maintained by SCF. Because of the emphasis on identifying manifestations and items, ALA considered pursuing revisions to accommodate references as attributes in RDA Chapter 2, but we believe that such referential attributes would represent “hidden relationships,” as explored in

¹ See [6JSC/TechnicalWG/3/ALA response](#), under recommendation 2.

² *Standard Citation Forms for Rare Materials Cataloging* (<http://rbms.info/scf/>)

[6JSC/DNB/Discussion/3](#). We believe modeling these references instead as relationships between resources will have many potential benefits in a linked data environment. Such a shift would likely emphasize identifiers or authorized access points over standard abbreviations or citation forms, but in so doing would allow for enhanced controlling, updating, searching, and display of references to suit specialized applications. One example of such an application would be to redirect searches or toggle displays between abbreviated and expanded forms (e.g. “VD 16” and *Verzeichnis der im deutschen Sprachbereich erschienenen Drucke des XVI. Jahrhunderts*).

Issues to be resolved

RDA chapters 24-28 already provide a general framework for recording WEMI-WEMI relationships, using relationship designators provided in Appendix J, along with identifiers, authorized access points, and/or structured or unstructured descriptions. ALA initially anticipated that the relationship exemplified in references could be readily accommodated within this framework, and that any further refinement or guidance on application of the options within this framework (e.g., the use of SCF) would instead be addressed in national and specialist policy statements.

As noted above, however, most references used in descriptive cataloging of rare materials are manifestation-to-expression or item-to-expression relationships. These relationships represent a more substantial departure, as RDA chapters 24-28 and Appendix J currently provide for relationships only between two entities at the same WEMI level.

A designation of the numbering or location of the description within the bibliography or catalog is almost always important for identification and access. Location is typically expressed as a citation number, volume, part, chapter, section, page number, and/or a sufficiently unique combination thereof. ALA thus proposes new instructions for Location within resource.

There is also substantial precedent for noting details on references in unstructured notes, especially when referenced descriptions contradict each other, or when the reference exhibits some other complexity (e.g., “Wing does not distinguish the variants.”). For related works and expressions, such notes are readily accommodated in existing instructions for Explanation of Relationship via RDA 25.2 and 26.2, respectively; ALA proposes parallel instructions for explanation of relationship to manifestations and items at 27.2 and 28.2, respectively.

Such a note on explanation of relationship is distinct from the use of reference sources to justify information supplied in other elements or to substantiate relationships; in these cases, the reference source is typically mentioned or quoted in existing notes on those elements or relationships, such as RDA 2.17.4 (Note on edition statement), RDA 24.7 (Source consulted), etc.

When a resource is notably absent from a source of appropriate coverage and scope, this has traditionally been conveyed in a note (e.g., “Not in Gesamtkatalog der Wiegendrucke”). This practice assists with user tasks of identification and differentiation. If, however, there is no relationship recorded, the instructions at 25.2, 26.2, and the proposed 27.2 and 28.2 for explaining a relationship do not apply. A negatively-defined relationship (“not referenced in”) would support this practice, though this would appear to be a substantial departure from the positively-construed relationships accommodated in RDA. Alternatively, an expansion of the scope of 25.2, 26.2, and the proposed 27.2 and 28.2 may accomplish the same goal, potentially with fewer implications.

Finally, we note that descriptions of microfilm/digital reproductions of rare books often contain the same references as those of the original, in many cases because in the MARC environment these bibliographic records are generated based on the record for the print version. Also, many online bibliographies and catalogs link to these digital reproductions. While it has often been pragmatic to include the same references in descriptions of reproductions, the relationship formally expressed in such a reference exists between only the original resource and the describing resource. Presumably, the relationship between the print and the digital reproduction would be recorded separately.

RDA cannot currently accommodate a revision of Chapters 24-28 and Appendix J (WEMI-to-WEMI relationships) to parallel Chapters 29-32 and ALA’s proposed revision of Appendix K (see 6JSC/ALA/43) without substantial restructuring. Taking such an approach seems impractical at this time in light of the changes anticipated with the FR model consolidation. Thus, we have proposed changes to RDA that generally mesh with the existing structure. However, we note that our proposal for Appendix J reciprocal terms does not conform to the current standard of having a one-to-one correspondence between designators and their inverses.

Summary of proposed changes

Note: Existing examples are unchanged and have been omitted from the proposal text.

Change #1: Chapter 24.0-24.4 revisions:

- Update 24.0, Scope, to accommodate new 24.7, *Location within Resource*
- Expand definition of “related [WEMI]” to allow for relationships at any WEMI level.
- Update 24.4, *Recording Relationships between Works, Expressions, Manifestations, and Items*, to add a reference to new 24.7

Change #2: Add 24.7, *Location within Resource*

- Add new instruction at 24.7
- Renumber subsequent instructions (current 24.7 and 24.8)
- Update references to renumbered instructions

Change #3: Chapter 25 revisions

- Expand scope so that a related work may be related to any WEMI level
- Add example to support new relationship designators (see Change #7)

Change #4: Chapter 26 revisions

- Expand scope so that a related expression may be related to any WEMI level
- Add examples to support new relationship designators (see Change #7)

Change #5: Chapter 27 revisions

- Expand scope so that a related manifestation may be related to any WEMI level
- Add new instruction 27.2, *Explanation of Relationship*, to parallel similar section in 25.2
- Add examples to support new relationship designators (see Change #7)

Change #6: Chapter 28 revisions

- Expand scope so that a related item may be related to any WEMI level
- Add new instruction 28.2, *Explanation of Relationship*, to parallel similar section in 25.2

Change #7: Appendix J revisions

- Add new relationship designators for referential relationships in J.2.3, J.3.3, J.4.3, and J.5.3, to replace the placeholder text

Change #8: Glossary

- Add new definition, *location within resource*
- Revise definitions for *related [WEMI]*

Impact

The structure ALA proposes to accommodate referential relationships in Appendix J and the details of the reciprocal relationships are strikingly different from the current approach in RDA. We believe that the changes proposed to the definitions of Related Work, Related Expression, Related Manifestation, and Related Item correct a major unintended error in RDA. It was only with the provision of reciprocal relationships in Appendix J that these relationships became limited to the same WEMI entity level. The impact of the inclusion of cross-entity relationships will be dramatic, because every “Reciprocal relationship” statement in Appendix J will need to be rewritten in the form that is being proposed here for the new relationship designators. However, such additional work is beyond the scope of this proposal and dovetails into the tasks assigned to the JSC Relationship Designators Working Group.

Similarly, other cross-entity WEMI-WEMI relationships may be considered in light of this proposal. For example, the manifestation-to-item relationship between a microfilm reproduction and a specific copy of a book is already given as an example in Chapter 28.1.1.1. It is also likely that “negative” relationships like those proposed here might have other useful implementations, such as: not the author; not successor; not sequel.

As noted above, the ALA proposal promotes a “relationship” approach rather than a “notes” approach for referential relationships, which represents a change in practice. However, ALA anticipates that attention to descriptive and referential relationships will have secondary benefits. Relating WEMI entities across catalogs and databases better aligns RDA with the linked data environment. The ability to identify related descriptions also supports RDA’s stated goals of internationalization and alignment with other specialist communities, who maintain descriptions of the same resources and entities in different languages and according to different standards. These relationships and their reciprocals may also support reuse of data in other applications, and new functionality in web-based reference sources, as well as linking and clustering of parallel records within and across databases.

The changes proposed below will impact both the RDA text and the RDA Registry and would likely prompt additional work on cross-entity relationships in RDA.

Proposals

Change #1: Chapter 24.0-24.4 Revisions

- Update 24.0, Scope, to accommodate new 24.7, *Location within Resource*
- Expand definition of “related [WEMI]” to allow for relationships at any WEMI level.
- Update 24.4, *Recording Relationships between Works, Expressions, Manifestations, and Items*, to add a reference to new 24.7

Marked-up copy:

24 GENERAL GUIDELINES ON RECORDING RELATIONSHIPS BETWEEN WORKS, EXPRESSIONS, MANIFESTATIONS, AND ITEMS

24.0 Scope

This chapter provides background information to support the application of guidelines and instructions in chapters 25–28 on recording relationships between works, expressions, manifestations, or items. It includes:

- a) an explanation of key terms (see 24.1)
- b) the functional objectives and principles underlying the guidelines and instructions in chapters 25–28 (see 24.2)
- c) the core elements for recording relationships between works, expressions, manifestations, and items (see 24.3)
- d) the use of identifiers, authorized access points, and/or descriptions to record those relationships (see 24.4)
- e) the use of relationship designators to indicate the specific nature of the relationship (see 24.5)

- f) instructions on recording the numbering of a part or parts within a larger work (see [24.6](#))
- g) instructions on recording the location within a larger resource (see [24.7](#))
- gh) instructions on recording elements that provide clarification or justification for the data recorded about relationships:
 - i) source consulted to cite sources used in determining the relationships between works, expressions, manifestations, or items (see [24.78](#))
 - ii) cataloguer's note to assist in the use or revision of the relationship data (see [24.89](#)).

[Instructions 24.1.1-24.1.2 unchanged]

24.1.3 Related Work, Expression, Manifestation, and Item

The terms *related work*, *related expression*, *related manifestation*, and *related item* are used as follows:

The term **related work**▼ is a work, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., an adaptation, commentary, supplement, sequel, part of a larger work).

The term **related expression**▼ is an expression, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., a revised version, a translation).

The term **related manifestation**▼ is a manifestation, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., a manifestation in a different format).

The term **related item**▼ is an item, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., an item used as the basis for a microform reproduction).

[Instructions 24.1.4-24.3 unchanged]

24.4 Recording Relationships between Works, Expressions, Manifestations, and Items

Record the relationship between a work, expression, manifestation, or item and a related work, expression, manifestation, or item by using one or more of these techniques, as applicable:

- a) identifier for the related work, expression, manifestation, or item (see [24.4.1](#))
- b) authorized access point representing the related work or expression (see [24.4.2](#))

and/or

- c) description of the related work, expression, manifestation, or item (see [24.4.3](#)).

Record an appropriate relationship designator to specify the nature of the relationship (see [24.5](#)).

Record the numbering of a part within a larger work (see [24.6](#)) if applicable and if considered important for identification or access.

Record the location within a resource (see [24.7](#)) if applicable and if considered important for identification or access.

For guidelines on using the authorized access point representing a related work or expression to generate a *see also* reference, see appendix E ([E.1.3.3](#)).

Clean copy:

24 GENERAL GUIDELINES ON RECORDING RELATIONSHIPS BETWEEN WORKS, EXPRESSIONS, MANIFESTATIONS, AND ITEMS

24.0 Scope

This chapter provides background information to support the application of guidelines and instructions in chapters [25–28](#) on recording relationships between works, expressions, manifestations, or items. It includes:

- a) an explanation of key terms (see [24.1](#))
- b) the functional objectives and principles underlying the guidelines and instructions in chapters [25–28](#) (see [24.2](#))
- c) the core elements for recording relationships between works, expressions, manifestations, and items (see [24.3](#))
- d) the use of identifiers, authorized access points, and/or descriptions to record those relationships (see [24.4](#))
- e) the use of relationship designators to indicate the specific nature of the relationship (see [24.5](#))
- f) instructions on recording the numbering of a part or parts within a larger work (see [24.6](#))
- g) instructions on recording the location within a larger resource (see [24.7](#))
- h) instructions on recording elements that provide clarification or justification for the data recorded about relationships:
 - i) source consulted to cite sources used in determining the relationships between works, expressions, manifestations, or items (see [24.8](#))
 - ii) cataloguer's note to assist in the use or revision of the relationship data (see [24.9](#)).

[Instructions 24.1.1-24.1.2 unchanged]

24.1.3 Related Work, Expression, Manifestation, and Item

The terms *related work*, *related expression*, *related manifestation*, and *related item* are used as follows:

The term **related work**▼ is a work, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., an adaptation, commentary, supplement, sequel, part of a larger work).

The term **related expression**▼ is an expression, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., a revised version, a translation).

The term **related manifestation**▼ is a manifestation, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., a manifestation in a different format).

The term **related item**▼ is an item, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., an item used as the basis for a microform reproduction).

[Instructions 24.1.4-24.3 unchanged]

24.4 Recording Relationships between Works, Expressions, Manifestations, and Items

Record the relationship between a work, expression, manifestation, or item and a related work, expression, manifestation, or item by using one or more of these techniques, as applicable:

- a) identifier for the related work, expression, manifestation, or item (see [24.4.1](#))
- b) authorized access point representing the related work or expression (see [24.4.2](#))

and/or

- c) description of the related work, expression, manifestation, or item (see [24.4.3](#)).

Record an appropriate relationship designator to specify the nature of the relationship (see [24.5](#)).

Record the numbering of a part within a larger work (see [24.6](#)) if applicable and if considered important for identification or access.

Record the location within a resource (see [24.7](#)) if applicable and if considered important for identification or access.

For guidelines on using the authorized access point representing a related work or expression to generate a *see also* reference, see appendix E ([E.1.3.3](#)).

Change #2: Add 24.7, *Location within Resource*

- Add new instruction at 24.7
- Renumber subsequent instructions (24.7–24.8 to 24.8–24.9); no markup provided
- Update references to renumbered instructions (no markup provided)
 - Change 24.7 to 24.8:
 - 5.8.1.1, Scope: 4th paragraph
 - 8.12.1.1, Scope: 4th paragraph
 - 29.6.1.1, Scope: 5th paragraph

- Change 24.8 to 24.9:
 - 5.9.1.1, Scope: 4th paragraph
 - 8.13.1.1, Scope: 4th paragraph
 - 29.7.1.1, Scope: 5th paragraph
 - A.8, Notes: 1st paragraph

24.7 Location within Resource *[new]*

24.7.1 Basic Instructions on Recording Location within Resource

24.7.1.1 Scope

Location within resource▼ is a designation of the position and/or sequencing of a specific component within a larger resource.

Location within resource may include:

- a) a unique identifier (e.g., a record number, citation number)
- b) a numeral, a letter, any other character, or a combination of these (with or without a caption (volume, number, chapter, page, etc.))

and/or

- c) an alphabetical or chronological designation.

24.7.1.2 Sources of Information

Take information on location within the resource from any source.

24.7.1.3 Recording Location within Resource

Record the location within the resource as it appears on the source of information. Apply the general guidelines on numbers expressed as numerals or as words at **1.8**. Abbreviate terms used as part of the numbering as instructed in appendix B (**B.5.5**).

EXAMPLE

T21891

Numbering of part within the work: Central Institute of Indian Languages. CIIL linguistic atlas

V, 578

Numbering of volume and page of entry within the work: Catalogue of books printed in the XVth century now in the British Museum [British Library]

Change #3: Chapter 25 revisions

- Expand scope so that a related work may be related to any WEMI level
- Add example to support new relationship designators (see Change #7)

Marked-up copy:

25 RELATED WORKS

25.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item and a related works.

25.1 Related Work

25.1.1 Basic Instructions on Recording Relationships to Related Works

25.1.1.1 Scope

A **related work**▼ is a work, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., an adaptation, commentary, supplement, sequel, part of a larger work).

25.1.1.2 Sources of Information

Take information on related works from any source.

25.1.1.3 Recording Relationships to Related Works

Record a relationship to a related work by applying the general guidelines at **24.4**.

[Add the following example to the 2nd example box]

EXAMPLE

Authorized Access Point Representing the Related Work

Not referenced in: Gesamtkatalog der Wiegendrucke

25.2 Explanation of Relationship

25.2.1 Basic Instructions on Recording Explanations of Relationships

25.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item and the related works.

25.2.1.2 Sources of Information

Take information explaining a relationship from any source.

25.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship ~~between related~~ to a related works if considered important for identification or clarification.

[Examples unchanged]

For guidelines on presenting an explanation of a relationship as part of an explanatory reference, see appendix E (E.1.3.4).

Clean copy:

25 RELATED WORKS

25.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item and a related work.

25.1 Related Work

25.1.1 Basic Instructions on Recording Relationships to Related Works

25.1.1.1 Scope

A **related work**▼ is a work, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., an adaptation, commentary, supplement, sequel, part of a larger work).

25.1.1.2 Sources of Information

Take information on related works from any source.

25.1.1.3 Recording Relationships to Related Works

Record a relationship to a related work by applying the general guidelines at 24.4.

[Add the following example to the 2nd example box]

EXAMPLE

Authorized Access Point Representing the Related Work

Not referenced in: Gesamtkatalog der Wiegendrucke

25.2 Explanation of Relationship

25.2.1 Basic Instructions on Recording Explanations of Relationships

25.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item and the related work.

25.2.1.2 Sources of Information

Take information explaining a relationship from any source.

25.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship to a related work if considered important for identification or clarification.

[Examples unchanged]

For guidelines on presenting an explanation of a relationship as part of an explanatory reference, see appendix E ([E.1.3.4](#)).

Change #4: Chapter 26 revisions

- Expand scope so that a related expression may be related to any WEMI level
- Add examples to support new relationship designators (see Change #7)

Marked-up copy:

26 RELATED EXPRESSIONS

26.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item and a related expressions.

26.1 Related Expression

26.1.1 Basic Instructions on Recording Relationships to Related Expressions

26.1.1.1 Scope

A **related expression**▼ is an expression, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., a revised version, a translation).

26.1.1.2 Sources of Information

Take information on related expressions from any source.

26.1.1.3 Recording Relationships to Related Expressions

Record a relationship to a related expression by applying the general guidelines at [24.4](#)

[Add the following example to the 3rd example box]

EXAMPLE

Structured Description of the Related Expression

Referenced in: Mormon bibliography, 1830-1930 / edited by Chad J. Flake and Larry W. Draper. – Second edition, revised and enlarged. 10023

Resource described: Lays of the lakes / by John C. Wright. Boston : Gorham Press, ©1911

[Add the following example to the 4th example box]

EXAMPLE

Unstructured Description of the Related Expression

Identified as Wing B3300

26.2 Explanation of Relationship

26.2.1 Basic Instructions on Recording Explanations of Relationships

26.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item, and a related expressions.

26.2.1.2 Sources of Information

Take information explaining a relationship from any source.

26.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship ~~between related to an~~ expressions if considered important for identification or clarification.

[Add the following example to the end of the example box]

EXAMPLE

Wing does not distinguish between editions

For guidelines on presenting an explanation of a relationship as part of an explanatory reference, see appendix E ([E.1.3.4](#)).

Clean copy:

26 RELATED EXPRESSIONS

26.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item and a related expression.

26.1 Related Expression

26.1.1 Basic Instructions on Recording Relationships to Related Expressions

26.1.1.1 Scope

A **related expression** is an expression, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., a revised version, a translation).

26.1.1.2 Sources of Information

Take information on related expressions from any source.

26.1.1.3 Recording Relationships to Related Expressions

Record a relationship to a related expression by applying the general guidelines at [24.4](#)

[Add the following example to the 3rd example box]

EXAMPLE

Structured Description of the Related Expression

Referenced in: Mormon bibliography, 1830-1930 / edited by Chad J. Flake and Larry W. Draper. – Second edition, revised and enlarged. 10023

Resource described: Lays of the lakes / by John C. Wright. Boston : Gorham Press, ©1911

[Add the following example to the 4th example box]

EXAMPLE

Unstructured Description of the Related Expression

Identified as Wing B3300

26.2 Explanation of Relationship

26.2.1 Basic Instructions on Recording Explanations of Relationships

26.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item, and a related expression.

26.2.1.2 Sources of Information

Take information explaining a relationship from any source.

26.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship to an expression if considered important for identification or clarification.

[Add the following example to the end of the example box]

EXAMPLE

Wing does not distinguish between editions

For guidelines on presenting an explanation of a relationship as part of an explanatory reference, see appendix E (E.1.3.4).

Change #5: Chapter 27 revisions

- Expand scope so that a related manifestation may be related to any WEMI level
- Add new instruction 27.2, *Explanation of Relationship*, to parallel similar section in 25.2
- Add examples to support new relationship designators (see Change #7)

Marked-up copy:

27 RELATED MANIFESTATIONS

27.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item, and a related manifestations.

27.1 Related Manifestation

27.1.1 Basic Instructions on Recording Relationships to Related Manifestations

27.1.1.1 Scope

A **related manifestation**▼ is a manifestation, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., a manifestation in a different format).

27.1.1.2 Sources of Information

Take information on related manifestations from any source.

27.1.1.3 Recording Relationships to Related Manifestations

Record a relationship to a related manifestation by applying the general guidelines at **24.4**.

[Add the following example to the 1st example box]

EXAMPLE

Identifier for the Related Manifestation

Referenced in: <http://estc.bl.uk/S112409>

[Add the following example to the 3rd example box]

EXAMPLE

Structured Description of the Related Manifestation

Referenced in: [Short--title catalogue of books printed in England, Scotland, & Ireland and of English books printed abroad, 1475-1640 / A. W. Pollard. — Second edition, revised and enlarged. — London : Bibliographical Society, 1976-1991. 17615](#)

27.2 Explanation of Relationship

27.2.1 Basic Instructions on Recording Explanations of Relationships

27.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item and a related manifestation.

27.2.1.2 Sources of Information

Take information explaining a relationship from any source.

27.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship to a manifestation if considered important for identification or clarification.

Clean copy:

27 RELATED MANIFESTATIONS

27.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item, and a related manifestation.

27.1 Related Manifestation

27.1.1 Basic Instructions on Recording Relationships to Related Manifestations

27.1.1.1 Scope

A **related manifestation**▼ is a manifestation, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., a manifestation in a different format).

27.1.1.2 Sources of Information

Take information on related manifestations from any source.

27.1.1.3 Recording Relationships to Related Manifestations

Record a relationship to a related manifestation by applying the general guidelines at **24.4**.

[Add the following example to the 1st example box]

EXAMPLE

Identifier for the Related Manifestation

Referenced in: <http://estc.bl.uk/S112409>

[Add the following example to the 3rd example box]

EXAMPLE

Structured Description of the Related Manifestation

Referenced in: Short--title catalogue of books printed in England, Scotland, & Ireland and of English books printed abroad, 1475-1640 / A. W. Pollard. — Second edition, revised and enlarged. — London : Bibliographical Society, 1976-1991. 17615

27.2 Explanation of Relationship

27.2.1 Basic Instructions on Recording Explanations of Relationships

27.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item and a related manifestation.

27.2.1.2 Sources of Information

Take information explaining a relationship from any source.

27.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship to a manifestation if considered important for identification or clarification.

Change #6: Chapter 28 revisions

- Expand scope so that a related item may be related to any WEMI level
- Add new instruction 28.2, *Explanation of Relationship*, to parallel similar section in 25.2

Marked-up copy:

28 RELATED ITEMS

28.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item and a related items.

28.1 Related Item

28.1.1 Basic Instructions on Recording Relationships to Related Items

28.1.1.1 Scope

A **related item**▼ is an item, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., an item used as the basis for a microform reproduction).

28.1.1.2 Sources of Information

Take information on related items from any source.

28.1.1.3 Recording Relationships to Related Items

Record a relationship to a related item by applying the general guidelines at **24.4**.

[Examples unchanged]

28.2 Explanation of Relationship

28.2.1 Basic Instructions on Recording Explanations of Relationships

28.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item and a related item.

28.2.1.2 Sources of Information

Take information explaining a relationship from any source.

28.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship to an item if considered important for identification or clarification.

Clean copy:

28 RELATED ITEMS

28.0 Purpose and Scope

This chapter provides general guidelines and instructions on recording relationships between a work, expression, manifestation, or item and a related item.

28.1 Related Item

28.1.1 Basic Instructions on Recording Relationships to Related Items

28.1.1.1 Scope

A **related item**▼ is an item, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., an item used as the basis for a microform reproduction).

28.1.1.2 Sources of Information

Take information on related items from any source.

28.1.1.3 Recording Relationships to Related Items

Record a relationship to a related item by applying the general guidelines at **24.4**.

[Examples unchanged]

28.2 Explanation of Relationship

28.2.1 Basic Instructions on Recording Explanations of Relationships

28.2.1.1 Scope

An **explanation of relationship**▼ is information elaborating on or clarifying the relationship between a work, expression, manifestation, or item and a related item.

28.2.1.2 Sources of Information

Take information explaining a relationship from any source.

28.2.1.3 Recording Explanations of Relationships

Record an explanation of the relationship to an item if considered important for identification or clarification.

Change #7: Appendix J revisions

- Add new relationship designators for referential relationships in J.2.3, J.3.3, J.4.3, and J.5.3, to replace the placeholder text.

Marked-up copy:

J.2.3 Referential Work Relationships

~~Designators for referential work relationships will be added in a future release of RDA.~~

referenced in (work) A work that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (work) A work that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (work) A work that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (work) A work that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

J.3.3 Referential Expression Relationships

~~Designators for referential expression relationships will be added in a future release of RDA.~~

referenced in (expression) An expression that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships*: reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (expression) An expression that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships*: referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (expression) An expression that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships*: not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (expression) An expression that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships*: not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

J.4.3 Referential Manifestation Relationships

~~Designators for referential manifestation relationships will be added in a future release of RDA.~~

referenced in (manifestation) A manifestation that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships*: reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (manifestation) A manifestation that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships*: referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (manifestation) A manifestation that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships*: not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (manifestation) A manifestation that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships*: not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

J.5.3 Referential Item Relationships

~~Designators for referential item relationships will be added in a future release of RDA.~~

referenced in (item) An item that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships*: reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (item) An item that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships*: referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (item) An item that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships*: not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (item) An item that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

Clean copy:

J.2.3 Referential Work Relationships

referenced in (work) A work that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (work) A work that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (work) A work that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (work) A work that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

J.3.3 Referential Expression Relationships

referenced in (expression) An expression that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (expression) An expression that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (expression) An expression that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (expression) An expression that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

J.4.3 Referential Manifestation Relationships

referenced in (manifestation) A manifestation that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (manifestation) A manifestation that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (manifestation) A manifestation that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (manifestation) A manifestation that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

J.5.3 Referential Item Relationships

referenced in (item) An item that contains a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* reference to (work), reference to (expression), reference to (manifestation), or reference to (item)

reference to (item) An item that is referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* referenced in (work), referenced in (expression), referenced in (manifestation), or referenced in (item)

not referenced in (item) An item that does not contain a reference to the described work, expression, manifestation, or item. *Reciprocal relationships:* not reference to (work), not reference to (expression), not reference to (manifestation), or not reference to (item)

not reference to (item) An item that is not referenced in the described work, expression, manifestation, or item. *Reciprocal relationships:* not referenced in (work), not referenced in (expression), not referenced in (manifestation), or not referenced in (item)

Change #8: Glossary

- Add new definition, *location within resource*
- Revise definitions for *related [WEMI]*

Marked-up copy:

location within resource A designation of the position and/or sequencing of a specific component within a larger resource.

related expression An expression, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., a revised version, a translation).

related item An item, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., an item used as the basis for a microform reproduction).

related manifestation A manifestation, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., a manifestation in a different format).

related work A work, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., an adaptation, commentary, supplement, sequel, part of a larger work).

Clean copy:

location within resource A designation of the position and/or sequencing of a specific component within a larger resource.

related expression An expression, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., a revised version, a translation).

related item An item, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., an item used as the basis for a microform reproduction).

related manifestation A manifestation, represented by an identifier or a description, that is related to the work, expression, manifestation, or item being described (e.g., a manifestation in a different format).

related work A work, represented by an identifier, an authorized access point, or a description, that is related to the work, expression, manifestation, or item being described (e.g., an adaptation, commentary, supplement, sequel, part of a larger work).

Addendum: Relationship to other standards

MARC:

MARC Bibliographic 510: Citations or references to published bibliographic descriptions, reviews, abstracts, or indexes of the content of the described item.

<http://www.loc.gov/marc/bibliographic/concise/bd510.html>

References to descriptions have generally been recorded in MARC Bibliographic 510, with a display constant “References.” Thus far, this has functioned as a structured note. Conceived as relationships, these could continue to be expressed as a structured note and/or URI in 510, with the display constant serving as the relationship designator. Alternatively, such relationships could be expressed via 7XX access points or linking entries with relationship designators generated or supplied by the cataloger. For references to published descriptions of items (for example, a particular annotated copy of a book described in the catalog of a former owner) it may be useful to define bibliographic 510 \$5 (institution to which field applies). Additional changes to MARC 510 may be needed to enable control and linking of authorized access points, identifiers, etc.

In authority records for works and expressions, references to published descriptions can also be expressed as a note in MARC Authority 672 (Title related to the entity) and/or by means of a relationship to another work or expression in MARC Authority 5xx fields, paired with appropriate relationship designators.

Schema.org:

schema:citation <http://schema.org/citation>

A citation or reference to another creative work, such as another publication, web page, scholarly article, etc.

Bibframe:

Bf:descriptionOf <http://bibframe.org/vocab-list/#descriptionOf>

Related resource that is analyzed, commented upon, critiqued, evaluated, reviewed, or otherwise described by the resource.

Citation Typing Ontology (CiTO):

cito:cites <http://purl.org/spar/cito/cites>

The citing entity cites the cited entity, either directly and explicitly (as in the reference list of a journal article), indirectly (e.g. by citing a more recent paper by the same group on the same topic), or implicitly (e.g. as in artistic quotations or parodies, or in cases of plagiarism).

cito:isCitedBy <http://purl.org/spar/cito/isCitedBy>

The cited entity (the subject of the RDF triple) is cited by the citing entity (the object of the triple).