

**To:** ALA/ALCTS/CaMMS Committee on Cataloging: Description and Access  
**From:** Kathy Glennan, ALA Representative to the Joint Steering Committee  
**Subject:** Create new sub-instructions in RDA 2.17 for:  
Other Information Relating to Numbering of Serials (RDA 2.17.5.6) and  
Other Information Relating to a Series Statement (RDA 2.17.11.5)

### **Background:**

Several instructions in RDA 2.17 contain an ability to record “other information relating to” a particular element. These include title, statement of responsibility and edition statement. However, the scope is more restrictive for some of the other instructions in RDA 2.17.

The current scope for RDA 2.17.5, *Note on Numbering of Serials*, is limited to the actual numbering or the time period involved; this sub-instruction does not encompass making a note about any other details relating to the numbering, such as where it was found. Similarly, the current scope of RDA 2.17.11, *Note on Series Statement*, restricts the use of this element to “complex series statements, incorrect numbering within series, or changes in series statements.” Again, this does not cover providing information about the source of the series statement. In both cases, however, catalogers do make such notes, even though RDA does not contain supporting instructions.

This proposal addresses these problems by broadening 2.17.5 and 2.17.11 to include a sub-instruction for “other information relating to...”, modeled after 2.17.4.4, *Other Information Relating to an Edition Statement*. In the case of 2.17.11, this means inserting the new instruction at 2.17.11.5 and renumbering the final sub-instruction. To support these changes, two Glossary definitions need to be expanded: *note on numbering of serials* and *note on series statement*.

Finally, there are two additional Glossary definitions which would benefit from the addition of “on” before the final clause: *note on edition statement* and *note on title*.

### **Impact:**

The proposed changes should not affect cataloging practice.

The RDA references to the current 2.17.11.5 will need to be changed to 2.17.11.6.

### **Proposal:**

#### **Change #1 (2.17.5)**

- Update 2.17.5.1
- Create a new sub-instruction (2.17.5.6)

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## 2.17.5 Note on Numbering of Serials

### 2.17.5.1 Scope

A **note on numbering of serials** ▼ is a note providing information on:  
the numbering of the first and/or last issue or part  
complex or irregular numbering (including numbering errors)

**or**

the period covered by a volume, issue, part, etc.

**or**

other information relating to numbering of serials.

### 2.17.5.2 Sources of Information

[Unchanged]

### 2.17.5.3 Numbering of First Issue or Part and/or Last Issue or Part

[Unchanged]

### 2.17.5.4 Complex or Irregular Numbering

[Unchanged]

### 2.17.5.5 Period Covered

[Unchanged]

### 2.17.5.6 Other Information Relating Numbering of Serials

Make notes on other details relating to numbering of serials, if considered important for identification or access.

#### EXAMPLE

Serial numbering provided by cataloger

Serial numbering printed on page 4 of cover mistakenly as: vol. 9, no. 2

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## 2.17.5 Note on Numbering of Serials

### 2.17.5.1 Scope

A **note on numbering of serials** ▼ is a note providing information on:  
the numbering of the first and/or last issue or part  
complex or irregular numbering (including numbering errors)

the period covered by a volume, issue, part, etc.

**or**

other information relating to numbering of serials.

### 2.17.5.2 Sources of Information

[Unchanged]

### 2.17.5.3 Numbering of First Issue or Part and/or Last Issue or Part

[Unchanged]

### 2.17.5.4 Complex or Irregular Numbering

[Unchanged]

### 2.17.5.5 Period Covered

[Unchanged]

### 2.17.5.6 Other Information Relating Numbering of Serials

Make notes on other details relating to numbering of serials, if considered important for identification or access.

#### EXAMPLE

Serial numbering provided by cataloger

Serial numbering printed on page 4 of cover mistakenly as: vol. 9, no. 2

#### Change #2 (2.17.11)

- Update 2.17.11.1
- Create a new sub-instruction (2.17.11.5)
- Renumber existing 2.17.11.5 to 2.17.11.6

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## 2.17.11 Note on Series Statement

### 2.17.11.1 Scope

A **note on series statement** ▼ is a note providing information on:  
complex series statements  
incorrect numbering within series

**or**

changes in series statements-

**or**

other information relating to a series statement.

### 2.17.11.2 Sources of Information

[Unchanged]

### 2.17.11.3 Complex Series Statements

[Unchanged]

### 2.17.11.4 Incorrect Numbering within Series

[Unchanged]

### 2.17.11.5 Other Information Relating to a Series Statement

Make notes on other details relating to a series statement, if considered important for identification or access.

#### **EXAMPLE**

Series statement from dust jacket

Second series statement from publisher's website

## 2.17.11.65 Change in Series Statements

Make notes on changes in series statements as appropriate to the mode of issuance of the resource:

multipart monographs and serials (see [2.17.11.65.1](#))

integrating resources (see [2.17.11.65.2](#)).

### 2.17.11.65.1 Multipart Monographs and Serials

Make notes on changes in series information that occur after the first/earliest part of a multipart monograph or serial if:

the changes are not already recorded as part of the series statement (see [2.12.1.6.1](#))

**and**

the changes are considered important for identification or access.

#### *Alternative*

If the changes have been numerous, make a general note.

#### **EXAMPLE**

Subtitle of series varies

### 2.17.11.65.2 Integrating Resources

Make notes on series information no longer present on the current iteration of an integrating resource (see [2.12.1.6.2](#)), if the deletions are considered important for identification or access.

#### **EXAMPLE**

Series title, 1991-1996: Client representation workbooks

**Current iteration has series title:** Special tax topics workbooks

If a series statement is added on a later iteration, make a note about the publication date of that iteration.

#### **EXAMPLE**

Series title began 1997

Resource began in 1995 without a series title

#### *Alternative*

If the changes have been numerous, make a general note.

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## 2.17.11 Note on Series Statement

### 2.17.11.1 Scope

A **note on series statement** ▼ is a note providing information on:  
complex series statements

incorrect numbering within series  
changes in series statements

*or*

other information relating to a series statement.

## 2.17.11.2 Sources of Information

[Unchanged]

## 2.17.11.3 Complex Series Statements

[Unchanged]

## 2.17.11.4 Incorrect Numbering within Series

[Unchanged]

## 2.17.11.5 Other Information Relating to a Series Statement

Make notes on other details relating to a series statement, if considered important for identification or access.

### EXAMPLE

Series statement from dust jacket

Second series statement from publisher's website

## 2.17.11.6 Change in Series Statements

Make notes on changes in series statements as appropriate to the mode of issuance of the resource:

multipart monographs and serials (see [2.17.11.6.1](#))

integrating resources (see [2.17.11.6.2](#)).

### 2.17.11.6.1 Multipart Monographs and Serials

Make notes on changes in series information that occur after the first/earliest part of a multipart monograph or serial if:

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*and*

the changes are considered important for identification or access.

#### *Alternative*

If the changes have been numerous, make a general note.

### EXAMPLE

Subtitle of series varies

### 2.17.11.6.2 Integrating Resources

Make notes on series information no longer present on the current iteration of an integrating resource (see [2.12.1.6.2](#)), if the deletions are considered important for identification or access.

### EXAMPLE

Series title, 1991-1996: Client representation workbooks

**Current iteration has series title:** Special tax topics workbooks

If a series statement is added on a later iteration, make a note about the publication date of that iteration.

**EXAMPLE**

Series title began 1997

Resource began in 1995 without a series title

**Alternative**

If the changes have been numerous, make a general note.

**Change #3 (2.12.1.6)**

- Update reference to current 2.17.11.5.1 in the 1<sup>st</sup> paragraph of 2.12.1.6.1
- Update reference to current 2.17.11.5.2 in the 2<sup>nd</sup> paragraph of 2.12.1.6.2

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## 2.12.1.6 Recording Changes in Series Statements

Record a change in series statements as appropriate to the mode of issuance of the resource:  
multipart monographs and serials (see [2.12.1.6.1](#))  
integrating resources (see [2.12.1.6.2](#)).

For changes indicating that the resource belongs to more than one series, apply the instructions at [2.12.1.5](#).

### 2.12.1.6.1 Multipart Monographs and Serials

Make a note (see [2.17.11.65.1](#)) if:

a series statement is added, deleted, or changed on a subsequent issue or part of a multipart monograph or serial

**and**

this change cannot be stated clearly in the series statement

**and**

the change is considered important for identification or access.

### 2.12.1.6.2 Integrating Resources

Change the series statement to reflect the current iteration of an integrating resource if a series statement is added, deleted, or changed on a subsequent iteration.

Make a note if the change is considered important for identification or access (see [2.17.11.65.2](#)).

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## 2.12.1.6 Recording Changes in Series Statements

Record a change in series statements as appropriate to the mode of issuance of the resource:  
multipart monographs and serials (see [2.12.1.6.1](#))  
integrating resources (see [2.12.1.6.2](#)).

For changes indicating that the resource belongs to more than one series, apply the instructions at [2.12.1.5](#).

### 2.12.1.6.1 Multipart Monographs and Serials

Make a note (see [2.17.11.6.1](#)) if:

a series statement is added, deleted, or changed on a subsequent issue or part of a multipart monograph or serial

**and**

this change cannot be stated clearly in the series statement

**and**

the change is considered important for identification or access.

### 2.12.1.6.2 Integrating Resources

Change the series statement to reflect the current iteration of an integrating resource if a series statement is added, deleted, or changed on a subsequent iteration.

Make a note if the change is considered important for identification or access (see [2.17.11.6.2](#)).

## Change #4 (Glossary)

- Update definition for *note on numbering of serials* to address addition to 2.17.5.1
- Update definition for *note on series statement* to address addition to 2.17.11.1
  - Add “on” before each clause, to mirror the pattern in similar Glossary definitions

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#### **note on numbering of serials**

A note providing information on the numbering of the first and/or last issue or part, on complex or irregular numbering (including numbering errors), ~~or~~ on the period covered by a volume, issue, part, etc., or on other information relating to numbering of serials.

#### **note on series statement**

A note providing information on complex series statements, on incorrect numbering within series, ~~or~~ on changes in series statements, or on other information relating to a series statement.

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#### **note on numbering of serials**

A note providing information on the numbering of the first and/or last issue or part, on complex or irregular numbering (including numbering errors), on the period covered by a volume, issue, part, etc., or on other information relating to numbering of serials.

#### **note on series statement**

A note providing information on complex series statements, on incorrect numbering within series, on changes in series statements, or on other information relating to a series statement.

### **Change #5 (Glossary)**

- Add “on” before the final clause in the definitions for:
  - note on edition statement
  - note on title

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#### **note on edition statement**

A note providing information on the source of an edition statement, on edition statements relating to issues, parts, etc., on changes in edition statements, or on other information relating to an edition statement.

#### **note on title**

A note providing information on the source from which a title was taken, the date the title was viewed, variations in titles, inaccuracies, deletions, etc., or on other information relating to a title.