

**To: Dominique Bourassa, Chair**  
**ALA/ALCTS/CaMMS/Committee on Cataloging: Description and Access**

**From: Matthew Haugen, Representative to CC:DA**  
**ALA/ACRL/Rare Books and Manuscripts Section**

**RE: Referential Relationships: RDA Chapters 24-28 and Appendix J**

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## **Summary:**

This proposal revises Chapters 24-28, and 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.

## **Background:**

At its meeting in November 2014, the Joint Steering Committee accepted the changes proposed by 6JSC/TechnicalWG/3 and 6JSC/ALA/31 to establish subject relationships in RDA in alignment with the FRSAD model and the anticipated consolidation of the FR models. The subject relationship is restricted to the domain of Work, including Works which describe other Works, Expressions, Manifestations, and Items (WEMI). Some refinement of this relationship may be possible for particular modes of description, including analysis, commentary, review, summary, evaluation, or critique. 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.

In doing so, the 6JSC/TechnicalWG/3 proposal 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. IAACR2 2.18C, DCRM(B) 7B14, and the other published DCRM manuals all give instructions for recording such references. RDA 25.1 (Related work) maps to MARC bibliographic field 510 which is used to encode these references, but there is no explicit parallel for these instructions within RDA.

ALA was charged with a follow-up proposal to address this complication, and RBMS agreed to coordinate the proposal. In the meantime, placeholders were added to RDA Appendix J.2.3, J.3.3, J.4.3, and J.5.3.

## **General comments:**

In evaluating the outcomes of 6JSC/TechnicalWG/3, the 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.<sup>1</sup> While there may or may not also be a descriptive or subject aspect to the relationship, the rare materials community

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<sup>1</sup> See comments on 6JSC/TechnicalWG/3 at <<http://alcts.ala.org/ccdablog/?p=1399#comments>>

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).<sup>2</sup> 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.). And while rare materials cataloging focuses on manifestations and items, works and expressions certainly have referential relationships to other resources as well. However, before the changes brought about by 6JSC/TechnicalWG/3 and 6JSC/ALA/31, RDA Chapters 24-28 and the relationship designators in Appendix J accommodated descriptive relationships only between two resources 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-as-subject relationships (Chapter 23).

Current community practice conveys references in notes, traditionally recorded in MARC bibliographic field 510. The source being cited has traditionally been identified by a standard abbreviation or a citation form as established and maintained by SCF. Because of the emphasis on identifying manifestations and items, we considered pursuing revisions to accommodate references as attributes in RDA Chapter 2, but felt that such referential attributes would represent “hidden relationships,” as explored by 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*).

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

## Outcomes of proposal:

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. We 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. We thus propose 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.”). These notes are readily accommodated in instructions for Explanation of Relationship, via RDA 26.2.

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 Note on edition statement (RDA 2.17.4), Source consulted (RDA 24.7), 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 26.2 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 26.2 may accomplish the same goal, potentially with fewer implications.

Finally, we note that records for microfilm/digital reproductions of rare books often contain the same references as records for the original, in many cases because these 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.

### **Impact:**

This proposal initially attempted to take a narrower approach to satisfy most rare materials applications for recording manifestation-to-expression and item-to-expression referential relationships in Chapter 26 and Appendix J.3.3. However, we soon realized that the reciprocal relationships inevitably implicated all WEMI levels. As a result, other descriptive relationships that had been affected by 6JSC/TechnicalWG/3 (such as indexing, abstraction, etc.) and other referential relationships considered out of scope for the specific needs of rare materials references might follow from this proposal. As an example, references to thematic index numbers for musical works (RDA 6.16.1.3.3) might be similarly conceived as a referential relationship between a musical work and a thematic index. Similarly, other cross-entity WEMI-WEMI relationships may follow from this proposal (e.g. the manifestation-to-item relationship between a microfilm reproduction of a specific copy of a book; in fact this scenario 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 not considered (e.g., not the author; not successor; not sequel).

More broadly, we anticipate that attention to descriptive and referential relationships will have secondary benefits. Relating WEMI entities across catalogs and databases can further RDA’s readiness for 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.

### **Proposed changes:**

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

Revision 1: Chapter 24.0-24.4 revisions

Revision 2: New instruction 24.7 Location within resource

Subsequent instructions (current 24.7-24.8) renumbered.

Revision 3: Chapter 25 revisions

Revision 4: Chapter 26 revisions

Revision 5: Chapter 27 revisions

Includes new instruction 27.2 for Explanation of relationship

Revision 6: Chapter 28 revisions

Includes new instruction 28.2

Revision 7: Appendix J revisions

New relationship designators in J.2.3, J.3.3., J.4.3, and J.5.3

Revision 8: Glossary

New definition: location within resource

revised definitions: related work, related expression, related manifestation, related item

## Revision 1: Chapter 24.0-24.4 Revisions

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### 24.0 Scope

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

- a) an explanation of key terms (see 24.1 [RDA](#))
- b) the functional objectives and principles underlying the guidelines and instructions in chapters 25 [RDA](#)–28 [RDA](#) (see 24.2 [RDA](#))
- c) the core elements for recording relationships between works, expressions, manifestations, and items (see 24.3 [RDA](#))
- d) the use of identifiers, authorized access points, and/or descriptions to record those relationships (see 24.4 [RDA](#))
- e) the use of relationship designators to indicate the specific nature of the relationship (see 24.5 [RDA](#))
- f) instructions on recording the numbering of a part or parts within a larger work (see 24.6 [RDA](#))
- g) instructions on recording the location within a larger resource (see 24.7 [RDA](#))
- 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 RDA](#) )
- ii) cataloguer's note to assist in the use or revision of the relationship data (see [24.89 RDA](#) ).

[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 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 RDA](#) )
  - b) authorized access point representing the related work or expression (see [24.4.2 RDA](#) )
- and/or**
- c) description of the related work, expression, manifestation, or item (see [24.4.3 RDA](#) ).

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

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

Record a designation of the location within a resource (see [24.7 RDA](#)) 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 RDA](#)).

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## 24.0 Scope

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

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

[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 [RDA](#) )
  - b) authorized access point representing the related work or expression (see 24.4.2 [RDA](#) )
- and/or**
- c) description of the related work, expression, manifestation, or item (see 24.4.3 [RDA](#) ).



Record an appropriate relationship designator to specify the nature of the relationship (see **24.5 RDA**).

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

Record a designation of the location within a resource (see **24.7 RDA**) 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 RDA**).

## Revision 2: New instruction 24.7

[Note: This new instruction would necessitate renumbering of following instructions 24.7 to 24.8 and 24.8 to 24.9, along with updating references to those instructions.]

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## 24.7 Location within Resource

### 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 [RDA](#). Abbreviate terms used as part of the numbering as instructed in appendix B (B.5.5 [RDA](#)).

#### EXAMPLE

T21891

Numbering of referential entry within the work: English Short Title Catalog.

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]

## Revision 3: Chapter 25

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## 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 RDA](#).

[Existing examples unchanged; new 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 RDA](#)).

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## 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 RDA](#).

[Existing examples unchanged; new 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 RDA).

## Revision 4: Chapter 26

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# 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 RDA

[Existing examples unchanged: New examples:]

#### Structured Description of the Related Expression

*Referenced in: Swedish imprints, 1731-1833. Volume 57*

#### 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.

[Existing examples unchanged; New 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 RDA**).

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## 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 LC-PCC PS

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

[Existing examples unchanged; new examples:]

#### Structured Description of the Related Expression

*Referenced in:* Swedish imprints, 1731-1833. Volume 57

#### 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.

[existing examples unchanged; new 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 [RDA](#)).

## Revision 5: Chapter 27

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### 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 RDA](#).

[Existing examples unchanged; new examples]

#### **Identifier of the Related Manifestation**

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

#### **Structured Description of the Related Manifestation**

*Referenced in:* [Short-title catalogue of books printed in England, Scotland, & Ireland and of English books printed abroad, 14751640 / A. W. Pollard. — Second edition, revised and enlarged. — London : Bibliographical Society, 19761991. 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.

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## 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**

**RDA**.

[Existing examples unchanged; new examples]

#### Identifier of the Related Manifestation

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

#### Structured Description of the Related Manifestation

*Referenced in:* Short-title catalogue of books printed in England, Scotland, & Ireland and of English books printed abroad, 14751640 / A. W. Pollard. — Second edition, revised and enlarged. — London : Bibliographical Society, 19761991. 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.

## Revision 6: Chapter 28

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## 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 RDA](#).

[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.

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## 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 RDA](#).

[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.

## Revision 7: Appendix J:

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### 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)

## Revision 8: Glossary

### New definition:

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

### Revised definitions:

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**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:

**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).

## Addenda:

### 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).

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