To: RDA Steering Committee

From: Dave Reser, LC Representative

Subject: RDA models for relationship data

General Comments on Relationship Designators

     Relationship designators in RDA do not contain verbs, but the RDA Registry labels that are based upon relationship designators do. These are examples of describing the same relationship using the different terms.

> **RDA relationship designator example:**
> Austen, Jane, 1775-1817. Emma **adapted as motion picture (work):** Clueless (Motion picture)
>
> **RDA Registry label (constrained) example:**
> Austen, Jane, 1775-1817. Emma **is adapted as motion picture (work)** Clueless (Motion picture)
>
> **RDA Registry label (unconstrained) example:**
> Austen, Jane, 1775-1817. Emma **is adapted as motion picture** Clueless (Motion picture)

     The working group says that the Registry label approach is "… not appropriate for RDA Toolkit. The Toolkit element and designator labels need to be general and suitable for a range of different implementation scenarios." The group's recommendations for relationship designators are based on this assumption, but we question whether it is a valid assumption, because the uses of non-verbalized designators in the Toolkit sometimes yield confusing results. We would like the working group to explain in more detail why the Registry approach is not viable for the Toolkit.

     We find the use of verbs often makes the Registry labels more understandable, and it seems like they could be implemented in a variety of scenarios. If the relationships designators were modified to contain verbs, an explanation could be added to the "general guidelines" sections in Appendix I-K and M explaining that the verbs could be omitted depending upon an agency's RDA implementation approach. The labels could be listed in alphabetical displays both with and without the verbs if necessary.

     It is also stated in the **Confusing labels** section that "RDA Toolkit users find the qualified labels using parentheses confusing." We agree with this statement, and we share the concern that the problems will only get worse with more cross-entity designators. However, we did not understand this assertion from the group about the "qualified labels" in the Toolkit: "…they are not intended for end-user consumption, for example as display labels." If this is accurate, then the current guidelines leave RDA implementers no guidance for what end-user display labels should be and how they would map to the relationship designators as given in the Appendices. We also note that RDA E.1.3.3 contains instructions about punctuation of relationships designators when used with *see also* references, and these are references clearly meant for end users. Our hope is that the relationship designators listed in the Toolkit could be used for end-users. Since the labels in the Toolkit are in fact merely labels, we even question whether

qualifiers are necessary if the entities in the domain and range are clear in the underlying Registry (see more at the response to Recommendation 5).

Recommendations

Recommendation 1: Generalize the *Related …* entity elements to cover all RDA current and future entities as specified in Appendix 1:

    a. Add a general *related entity* relationship element with the definition "An entity that is associated with the entity being described". This element is its own reciprocal.

    b. Generalize the definitions of the current *Related ...* entity elements as element sub-types of *related entity*.

    c. Retain the current same-entity *related ...* entity definitions but qualify the labels, as element sub-types of the generalized *related ...* entity elements.

    d. Add specific cross-entity *related ...* entity elements for all non-same pairs of RDA entities.

    e. Differentiate the labels by adding qualifiers for the source entity.

    f. Update the RDA Toolkit instructions for the elements marked **.

    g. Add properties for the full set of designators to the RDA Registry.

LC response: Agree in part. We're not sure if all of the relationships need to be in the Toolkit at this time. For example, the highest level relationship "related entity" (the equivalent of Res 1 – is associated with—Res 2) may be necessary in the Registry, but since RDA itself provides no instructions or definition for "entity," we are only left with a relationship designator and no other support. We think the Toolkit work likely requires more than what is proposed in Change 1. We're also curious about how such high-level relationships would be incorporated into a tool such as RIMMF. We also question the need for qualifications when the entities of the domain and range are clear. For our response to parts **c**. and **e.** of this recommendation see the comments at **Recommendation 5**).

Recommendation 2: Add designators for subject-related *Person*, *Family*, and *Corporate Body* entities to Appendix M.
LC response: We agree. See our response to **Change 2** below for how we think this should be implemented.

Recommendation 3: Add cross-entity designators for items that are reproduced as manifestations to Appendix J.
LC response: We agree, if it can be accomplished with clarity. See our response to **Change 3** below.

Recommendation 4: Add reciprocal designators for cross-entity PFC to WEMI designators to RDA Toolkit.

LC response: Agree. We believe there is equal value in being able to express the relationship Emma **has author** Jane Austen as there is in expressing the relationship Jane Austen **is author of** Emma.

Recommendation 5: Consider other arrangements of relationship elements and designators and their associated instructions in RDA Toolkit, including tables and thesaurus architectures with navigable broader/narrower and see/see also cross-references, and consider re-organizing the basic layout of designators to reflect Table 5. **LC response:** We agree with the working group that the current structure is inconsistent and has weaknesses that will only be exacerbated in the future. Including the alphabetical listing of designators in the Glossary was a partial solution. However, in order to understand and apply the designators, separate listings outside of the Glossary are still necessary, both by hierarchy relevant to the domain/range, alphabetically with links to the hierarchical listings, and including cross-references when applicable.

One possible (and partial) solution is to provide an embedded "tool" from the Toolkit that allows the cataloger to select a "starting point" (e.g., the domain) from a drop-down list, then have another drop-down list for the range, and then after both domain and range are selected, the tool shows ONLY the relationship designators that are allowable for that domain and range. For example, since *Emma* is a work, a cataloger should select domain **WORK** in the first box, select range **WORK** in the second box, then the took would provide as the results the relationship designators that were appropriate for that domain and range, including **adapted as motion picture**.

From a workflow perspective, the tool should be approachable from any of the three parts of the triple. For example, if the catalogers want to select the relationship designator **cartographer**, the tool would show a list of domains **PERSON**, **FAMILY,** and **CORPORATE BODY**, and the range **WORK**. If the underlying design of the tool (fed from the Registry) only allows for appropriate entities, it should prevent irrational relationships (e.g., if lithographer is selected, the domain **ITEM** should not be possible).

If qualifiers are necessary for relationships that can have different domains/ranges depending on the hierarchy, we think this is better accomplished with simple phrases (e.g., "reproduced as (item to item)" or "reproduced as (manifestation to item)" instead of multiple sets of parentheses. If it were possible to feed the drop-down lists from the Registry, the maintenance in the Toolkit would be minimal. An indication could be made at RDA 0.10 that the examples of relationships are derived from the tool.

A possible illustration of the Tool is given at the end of this response.

Recommendation 6: The RSC Relationship Designators Working Group should undertake a complete review of designator labels in the context of the proposed matrix of high-level relationship elements in Recommendation 1 and the potential for different displays and layouts of the designations in Recommendation 5, in collaboration with the RDA Development Team.

LC response: Agree, keeping in mind that the arrangement would need to be extensible to Subject relationships, and to Place and Time-span entities in the future. As part of the 2013 JSC meeting follow-up, LC was tasked to develop "placeholder definitions for high-level categories of designator in RDA Toolkit Appendix J" (e.g., derivative, equivalent, whole-part); it may be helpful to include such hierarchical categories as relationship designators in the future, when applicable. In general, the specifications for new designators (page 15) seem comprehensive. For "resolving label issues," see our response to **Recommendation 5** above.

Change 1: Revision of 24.1.3 and 29.1.3

LC response: We're not comfortable adding the "related entity" or "related agent" relationships at this time, as noted in our comments at Recommendation 1 above. Note that there is currently no definition of "entity" in the Glossary, and "related entity" is currently a see reference for "related resource".

Change 2: Revision of Appendix M

LC response: Recognizing that the proposed new relationship designators reflect the current RDA disambiguation template, we would prefer to use unambiguous terms instead:

person described in ~~(person)~~

described ~~description of~~ (person~~)~~

family described in ~~(family)~~

described ~~description of (family~~)

corporate body described in ~~(corporate body)~~

described ~~description of~~ (corporate body~~)~~

Clean copy:

person described in

described person

family described in

described family

corporate body described in

described corporate body

Change 3: Revisions to Appendix J

LC response: We think that the proposed template of double qualification would be so confusing for catalogers that we strongly prefer the approach shown with alternative labels found in Appendix 3. In fact, we would prefer not to add these relationships at this time if the alternative labels are not used. Of the options for placement, we agree with the working group that J.5.2 would be the most confusing; it would also require scope changes to show that the relationships are not all "item to item." A new section at J.5.6 would also require a new section at J.4.6 (for the reciprocals with the manifestation as the domain). We think a cleaner approach would be for a new cross-entity section (e.g., J.6) that can be captioned and introduced unambiguously.

Other comments:

The discussion of "Place, Time-span" on page 7 of the report acknowledges that place and time-span will be entities under LRM, and that RDA will need to accommodate relationships with these new entities. Based on the example given "(has) place of publication," we urge some caution when it comes to labeling relationships that are the same as the name of elements and sub-elements (e.g., place of publication). This overlap may be mitigated with the introduction of instructions explaining the four-fold path when RDA is redesigned.

Illustration of Toolkit "Tool" to Assist Catalogers in Choosing Relationship Designators

Domain and Range are selected then a list of valid relationship designator is populated. Clicking on the plus sign provides a list of specific designators for the general designator "adaptation of."

Domain	Relationship Designator	Range	
FAMILY	abridgement of	FAMILY	SUBMIT
ITEM	abstract of	ITEM	
MANIFESTATION	abstracts for	MANIFESTATION	
PERSON	⊞ adaptation of	PERSON	

WORK	choreographic adaptation of
	   dramatization of
	   graphic novelization of
	   libretto based on
	   motion picture adaptation of
		WORK	

Domain and Relationship Designator are selected. The only valid value for the Range is provided.

Domain	Relationship Designator	Range	
FAMILY	member	CORPORATE BODY	SUBMIT
ITEM	medium		
MANIFESTATION	minute taker		
PERSON	musical director		
WORK	on-screen participant		
	⊞ performer		