

AFO 123 - Global change holdings

123.1 Introduction Use this AFO to change common information in groups of holdings.

To apply changes you need to:

- Collect a number of records (bibliographic or items) in a save list that serves as a conversion file;
- Define a conversion table (in which you specify what the shelfmarks to be converted must look like, as well as what the new shelfmarks must look like);
- Convert the records in the save list using the conversion table.
- Use the Conversion reports option to view a report about the results of your holdings conversion run.

Some examples of how this AFO could be applied:

- Re-organising a library (when the materials have been organised in a different manner);
- If categories of the classification system (such as SISO) that determine the organisation of the materials are changed;
- If the library converts from an organisational system based on a classification system to a 'user-friendly' organisation (such as one using colour codes, for example);
- If errors in the catalogue need be corrected.

Note

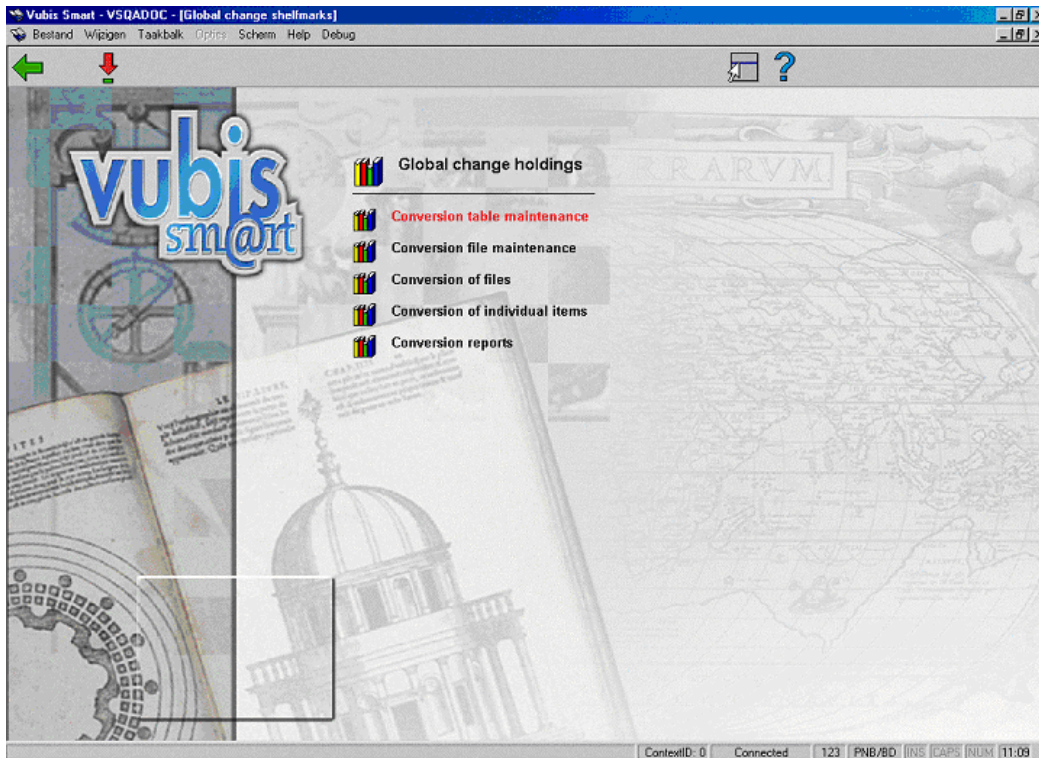
Making global changes puts a large processing load on your Vubis Smart system. Ideally, this procedure should be run during times when your Vubis Smart system is used least.

Caution: This procedure is a powerful tool for changing holdings information. Use this procedure with care, as mistakes can cause damage to the holdings information in your Cataloguing database.

The Conversion of individual items option on the Global change holdings menu, is not part of the procedure for changing holdings information for groups of records. This option is only used for changing individual holdings, and is included on the Global change holdings menu as a convenience. See the help for AFO 124 for more details on this procedure.

“Global changes” has a number of similarities with item transfer in AFO 462 and AFO 463. These AFOs enable you to transfer items from one agency and/or location to another. Nonetheless these are two entirely different mechanisms. “Global changes” is an activity that causes shelfmarks to be changed definitively in the catalogue. The system does not keep a history of such a change. Transferring items is a circulation activity in which items are transferred from one agency/location to another with the intention of returning the items to their “owner”.

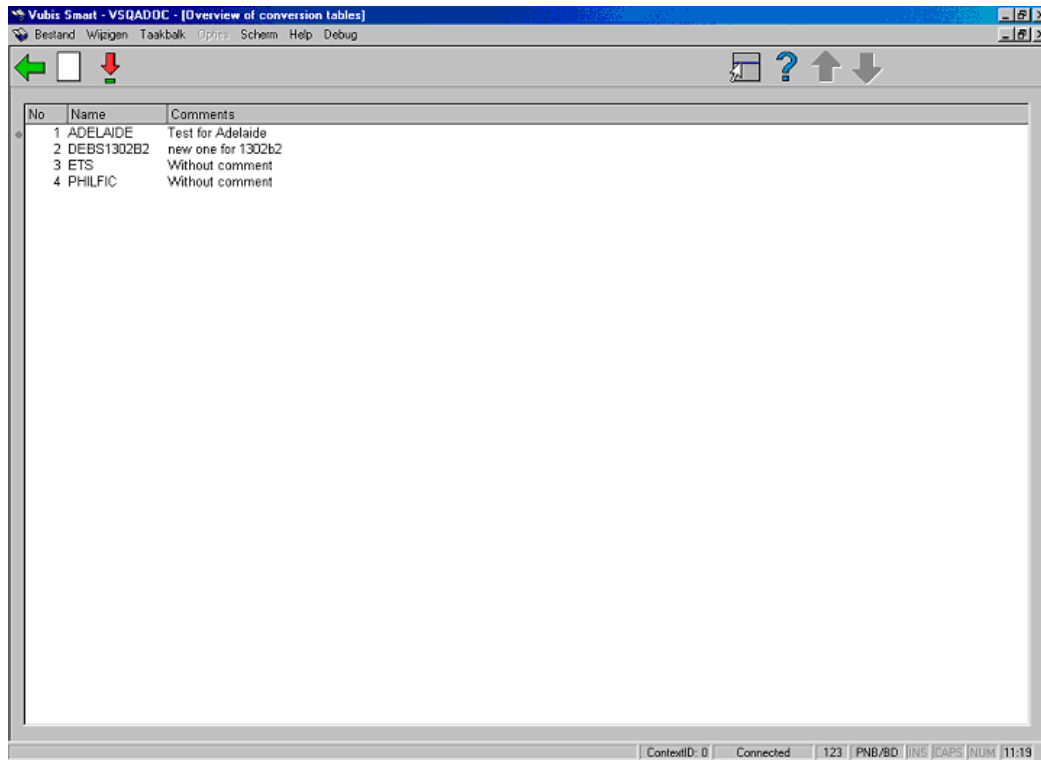
When you start this AFO a submenu is displayed:



The various menu options are discussed in the next paragraphs.

123.2 Conversion table maintenance

If conversion tables already exist an overview screen will be displayed. If not, an input screen will be displayed allowing you to define a new table (see below).



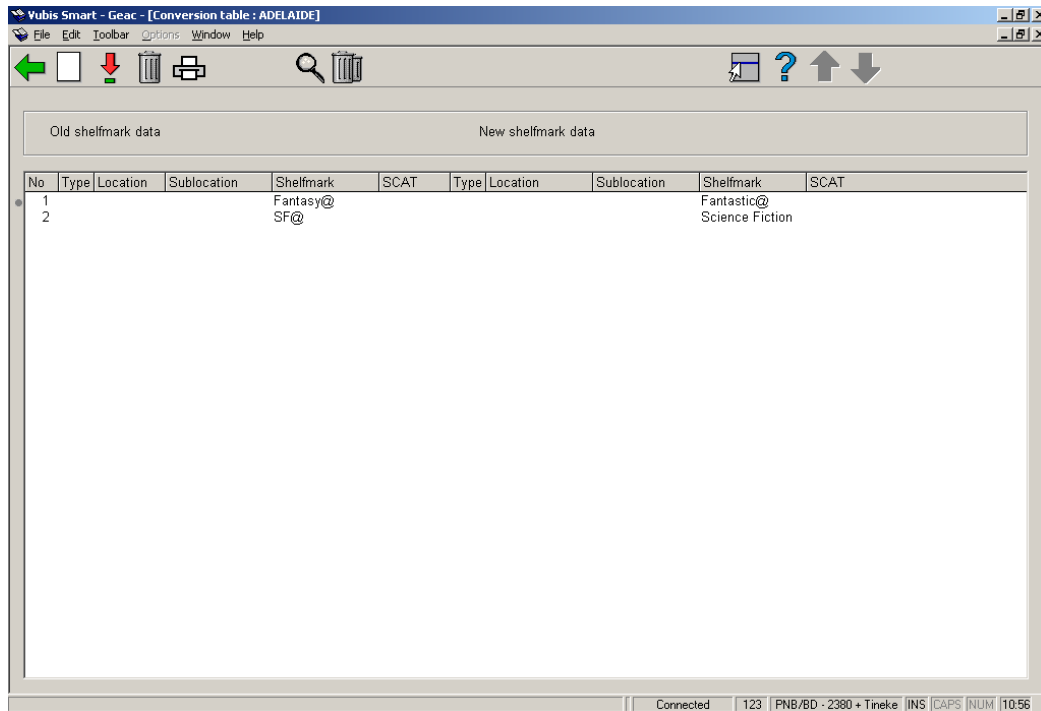
Options on the screen

New table: select this option to create a new table. After choosing this option you will be prompted for **Name** (enter a name for your new conversion table) and **Comment** (enter comments about or a description of your new conversion table). Clicking on **OK** will present you with a window allowing you to input the criteria to be used by this table.

Choose table: select a table and then this option to modify the details of an existing table.

123.2.1 Choose table

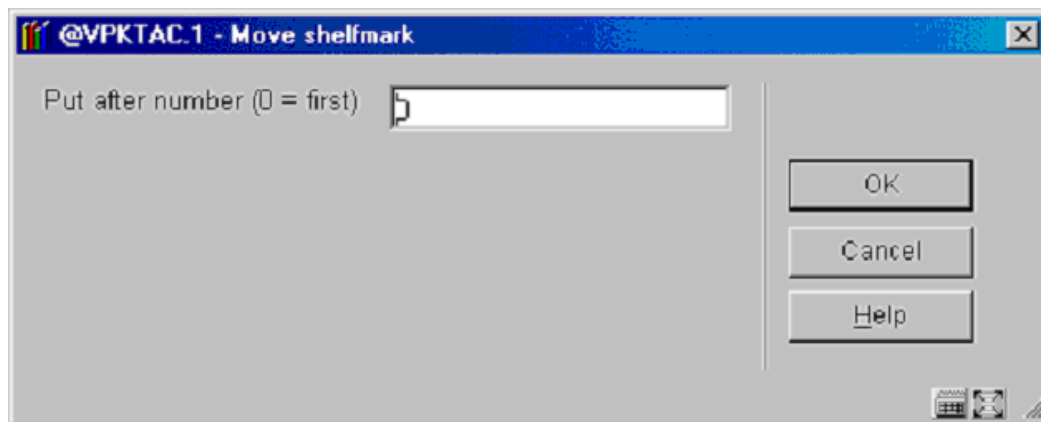
Select an existing conversion table from the survey screen and click on this option to modify it. You will be presented with an overview screen:



Options on the screen

New criteria - choose this option to add a criterion to the table. See section 123.2.1.1.

Move criteria (+) - select a criterion from the table and use this option to re-position it.

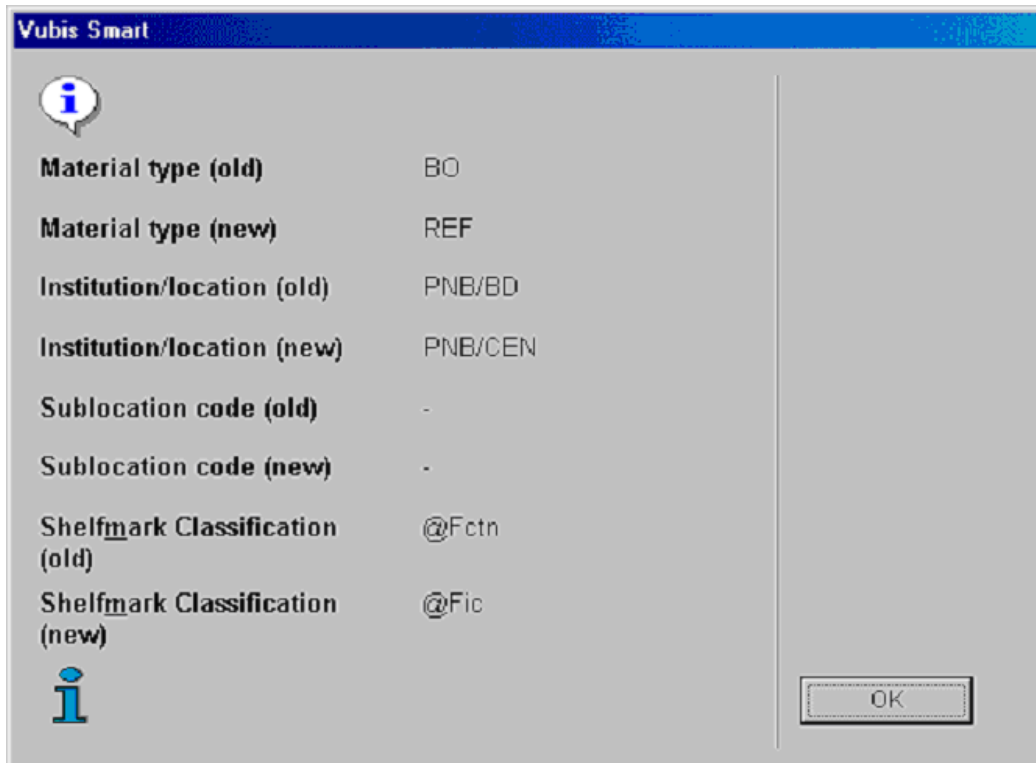


Enter "0" (zero) to move it to the top. Clicking on **OK** will return you to the overview screen which will reflect the new sequence.

Delete criteria (+) - select a criterion from the table and use this option to delete it.

Print table - use this option to print the data. You will be presented with the standard output window.

Display details (+) - choosing this option will result in a display with all the data fields from the selected criterion.



Delete table - on choosing this option you will be asked for confirmation and then the entire table will be deleted.

123.2.1.1 Add conversion criteria

New criteria - choose this option to add a criterion to the table. After choosing this option you will be presented with an input form:

Fields on the screen

Material type (old) - enter the old material type code that you want to change.

Material type (new) - enter the new material type code to which you want to change. Your new material type code must be already defined in the system.

Location code (old) - enter the old location code that you want to change.

Location code (new) - enter the new location code to which you want to change. Your new location code must be already defined in the system.

Sublocation shelfmark (old) - enter the old sublocation code that you want to change.

Sublocation shelfmark (new) - enter the new sublocation code to which you want to change. Your new sublocation code must be already defined in the system.

Sublocation shelfmark (old) - enter the old shelfmark that you want to change.

Sublocation shelfmark (new) - enter the new shelfmark to which you want to change. Your new shelfmark must be already defined in the system.

When you have entered the desired criteria click on **OK**. The system will return an empty **"Add conversion criteria"** window. If you have input all the desired criteria click on **Cancel** and the system will display the new table on the overview screen.

123.2.1.2 Remarks on sublocation and shelfmark data

The "@" character can be used to truncate. The number of truncation characters specified must be identical in the old and new shelfmark. The system does not allow you just to have only a truncation character in either the old or the new shelfmark.

Example:

"8@" all shelfmarks that begin with 8

"@8" all shelfmarks that end in 8

"8@55" all shelfmarks that begin with 8 and end in 55

The system follows the conversion table specified for the conversion and looks for an 'old' shelfmark that corresponds to the description of the shelfmark to be converted. If this pattern is found, the shelfmark is converted and the system exits the table. If no valid pattern is found, the shelfmark is not converted.

The sequence of the conversion criteria in the conversion table is thus extremely important: you must enter the conversion criteria from specific to general.

Example:

You want to convert all shelfmarks that begin with 399 to shelfmarks that begin with RED 399 and you want to convert all shelfmarks that begin with 39 to convert to shelfmarks that begin with GREEN 39.

Note

Do not start the table with the command "39@ → GREEN 39@"!

If the system performs this conversion first, it will never find the pattern "399", because that will already have been replaced by "GREEN 39". To be able to replace both patterns you must enter the most specific search command as the first line of the conversion table, thus "399@ → RED 399@".

The system makes a distinction between capital and lower case letters in the shelfmark, even if your system automatically converts shelfmarks to capital letters. The system also takes punctuation marks into account.

123.3 Conversion file maintenance

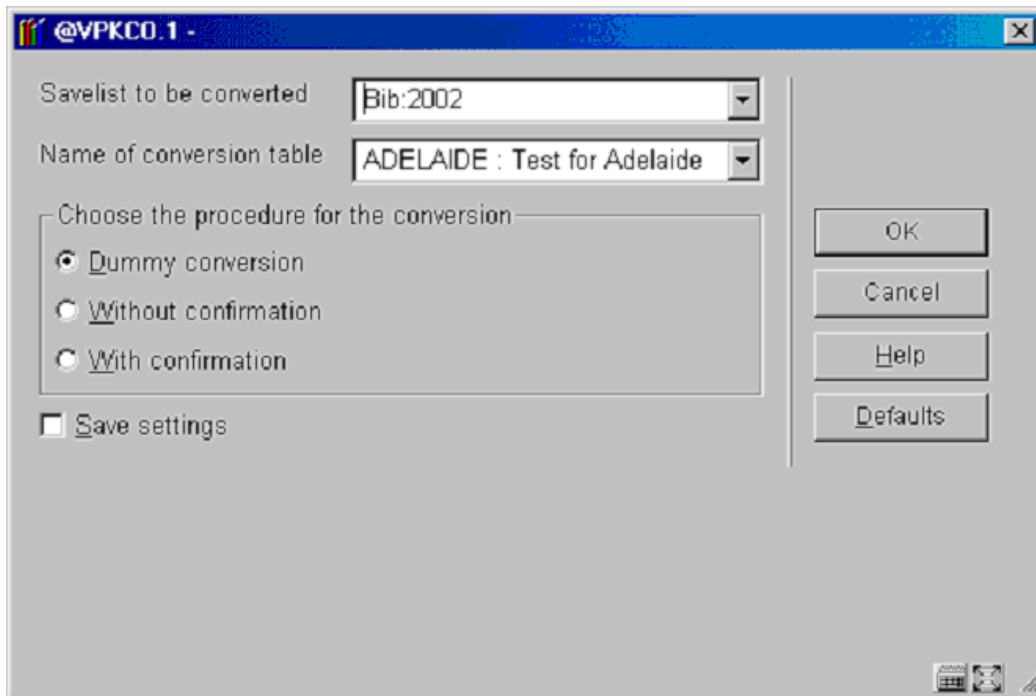
Here you can define your holdings selection and create a savelist which can then be used together with a conversion table to perform the required global change. After choosing this option you will be presented with an overview screen:

No.	Application	Savelist name	Sorted list	Status	Date	Comment	Number of records
1	Authorities	COPYSEEREFES	Non sorted	Open	31 Jul 2003	see refere	38
2	Authorities	SEEREFERNCES	Non sorted	Open	31 Jul 2003	see refere	14
3	Authorities	UMSUBJECTS	Non sorted	Open	31 Jul 2003	see refere	38
4	Authorities	AUTHORIEXPORT	Non sorted	Open	31 Jul 2003	export	0
5	Authorities	AUTH2	Non sorted	Open	02 Dec 2002	authtestrv	0
6	Authorities	AUTH	Non sorted	Open	02 Dec 2002	TESTAUT	0
7	Authorities	XXXXX	Non sorted	Open	18 Apr 2002		2
8	Bibliographic	MATHUSTEST	Non sorted	Open	09 Jul 2004	TEST MA	0
9	Bibliographic	CLANCY	Non sorted	Open	14 May 2004		10
10	Bibliographic	NEWINDIVIDUAL	Non sorted	Open	26 Apr 2004	add recor	0
11	Bibliographic	DVDZSORTED	Sorted	Open	12 Dec 2003		6
12	Bibliographic	TESTGUY	Non sorted	Open	24 Nov 2003		14
13	Bibliographic	THESAURUSTEST	Non sorted	Open	26 Sep 2003		2
14	Bibliographic	TESTERROR	Non sorted	Open	18 Aug 2003		33
15	Bibliographic	TESTRVN624	Non sorted	Open	01 Jul 2003		1
16	Bibliographic	SAVE444	Non sorted	Locked	24 Jun 2003		0
17	Bibliographic	COMPARE62	Non sorted	Open	24 Jun 2003		16
18	Bibliographic	EL624	Non sorted	Locked	24 Jun 2003		0
19	Bibliographic	WESTERN2	Non sorted	Locked	20 Jun 2003		0
20	Bibliographic	AUTHUM41	Non sorted	Open	01 Apr 2003		8
21	Bibliographic	MERGEUS	Non sorted	Open	28 Mar 2003		3
22	Bibliographic	PHILMAR27	Non sorted	Open	27 Mar 2003		2
23	Bibliographic	ERRORSUNIMARC	Non sorted	Open	17 Feb 2003		76
24	Bibliographic	DGDG	Non sorted	Open	23 Dec 2002		28
25	Bibliographic	IDOLS	Non sorted	Open	02 Dec 2002		1
26	Bibliographic	PHIL1128	Non sorted	Open	28 Nov 2002		13
27	Bibliographic	21M2B1	Non sorted	Open	29 Oct 2002		19
28	Bibliographic	21M2B2	Non sorted	Open	28 Oct 2002	discoverin	2
29	Bibliographic	2002SORTED	Sorted	Open	24 Sep 2002	sorted 2.1	452
30	Bibliographic	SELBIB	Non sorted	Open	18 Sep 2002		68

This screen is a part of the save list management which is discussed further in AFO 141 (SSP management).

123.4 Conversion of files

This option enables you to run the holdings conversion for which you had set up a conversion table and a savelist file. After choosing this option the following input screen will be displayed:



Fields on the screen

Savelist to be converted - click the drop down arrow to select the savelist you earlier created with the records that you want to change.

Name of conversion table - click the drop down arrow to select the conversion table that you want to use for changing the records in the savelist that you selected in the previous field.

The system allows you to convert a save list manually. You use this option by entering an asterisk (*) instead of the name of a conversion table. Manual conversion means that you can enter a new shelfmark for each bib record or object.

Choose conversion procedure: you have the following options:

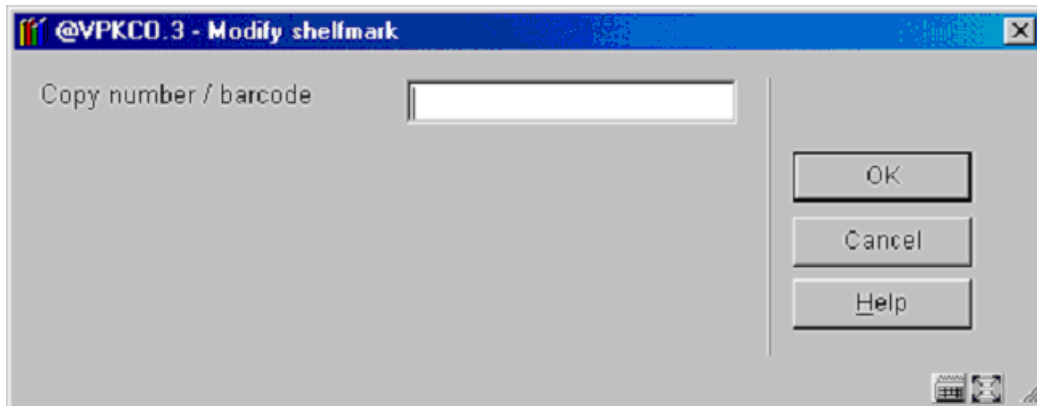
- **Dummy conversion** - click to select a test run of your holdings conversion using the savelist and conversion table you have chosen. A report will be created but no actual changes will be made to the holdings in your savelist.
- **Without confirmation** - click to select a run of your holdings conversion using the savelist and conversion table you have chosen. A report will be created and the specified changes will be applied to the holdings in your savelist.
- **With confirmation** - click to select a run of your holdings conversion, using the savelist and conversion table you have chosen, with a confirmation window for each change. A

report will be created but only the specified changes which have been confirmed will be applied to the holdings in your savelist.

When you click on **OK** you will be presented with the standard form for scheduling processes..

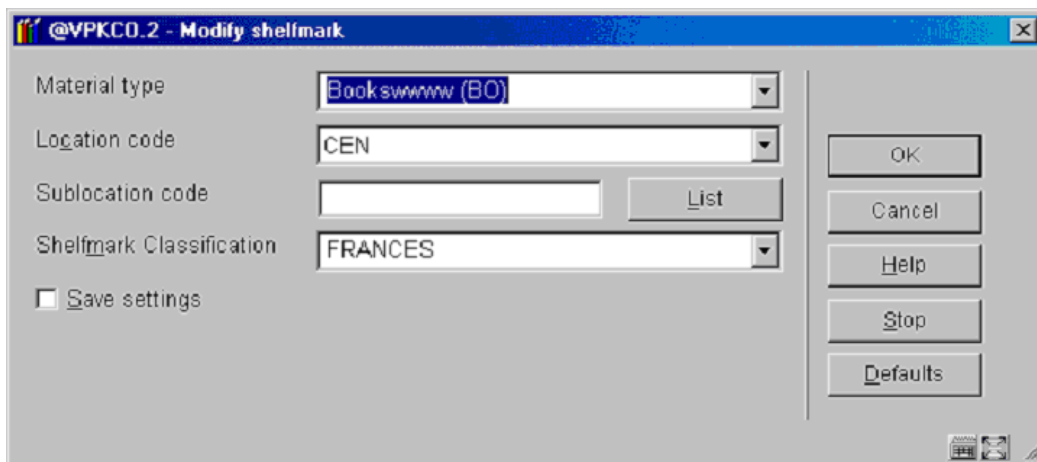
123.5 Conversion of individual items

After choosing this option you will be presented with an input form:



The screenshot shows a dialog box titled "@VPKCO.3 - Modify shelfmark". It contains a text input field labeled "Copy number / barcode". To the right of the input field are three buttons: "OK", "Cancel", and "Help".

Select your item and then



The screenshot shows a dialog box titled "@VPKCO.2 - Modify shelfmark". It contains several fields and buttons:

- "Material type" dropdown menu with "Bookswwww (BO)" selected.
- "Location code" dropdown menu with "CEN" selected.
- "Sublocation code" text input field with a "List" button next to it.
- "Shelfmark Classification" dropdown menu with "FRANCES" selected.
- A checkbox labeled "Save settings" which is currently unchecked.
- Buttons: "OK", "Cancel", "Help", "Stop", and "Defaults".

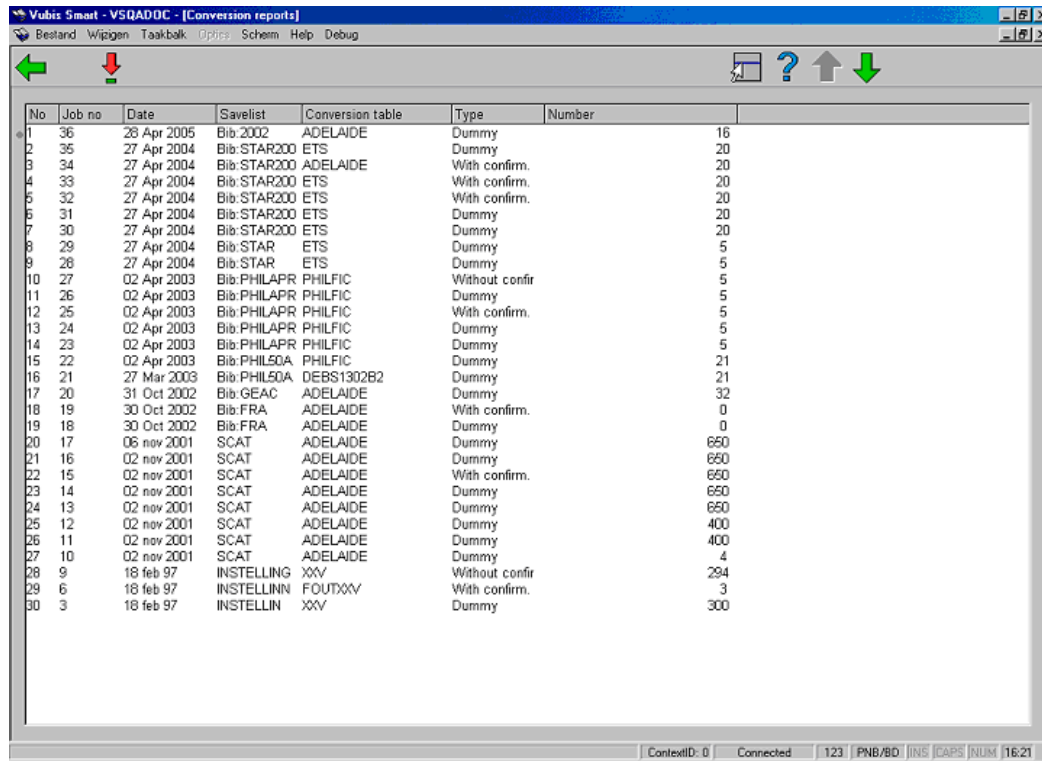
make the changes you want.

Note

Before the changes are actually applied, the system will check that the password used is authorised to make these changes.

See also the help on AFO 124 for more information on this option.

123.6 Conversion reports After choosing this option you will be presented with an overview screen listing the reports:



The screenshot shows a software window titled "Vubis Smart - VSQADDC - [Conversion reports]". The window has a menu bar with "Bestand", "Wijzen", "Taakbak", "Ops", "Schem", "Help", and "Debug". Below the menu bar is a toolbar with icons for back, forward, search, and other navigation functions. The main area contains a table with the following columns: No, Job no, Date, Savelist, Conversion table, Type, and Number. The table lists 30 rows of conversion reports, including details like dates, savelists, conversion tables, types (e.g., Dummy, With confirm., Without confir.), and numbers.

No	Job no	Date	Savelist	Conversion table	Type	Number
1	36	28 Apr 2005	Bib.2002	ADELAIDE	Dummy	16
2	35	27 Apr 2004	Bib.STAR200	ETS	Dummy	20
3	34	27 Apr 2004	Bib.STAR200	ADELAIDE	With confirm.	20
4	33	27 Apr 2004	Bib.STAR200	ETS	With confirm.	20
5	32	27 Apr 2004	Bib.STAR200	ETS	With confirm.	20
6	31	27 Apr 2004	Bib.STAR200	ETS	Dummy	20
7	30	27 Apr 2004	Bib.STAR200	ETS	Dummy	20
8	29	27 Apr 2004	Bib.STAR	ETS	Dummy	5
9	28	27 Apr 2004	Bib.STAR	ETS	Dummy	5
10	27	02 Apr 2003	Bib.PHILAPR	PHILFIC	Without confir	5
11	26	02 Apr 2003	Bib.PHILAPR	PHILFIC	Dummy	5
12	25	02 Apr 2003	Bib.PHILAPR	PHILFIC	With confirm.	5
13	24	02 Apr 2003	Bib.PHILAPR	PHILFIC	Dummy	5
14	23	02 Apr 2003	Bib.PHILAPR	PHILFIC	Dummy	5
15	22	02 Apr 2003	Bib.PHILSOA	PHILFIC	Dummy	21
16	21	27 Mar 2003	Bib.PHILSOA	DEBS1302B2	Dummy	21
17	20	31 Oct 2002	Bib.GEAC	ADELAIDE	Dummy	32
18	19	30 Oct 2002	Bib.FRA	ADELAIDE	With confirm.	0
19	18	30 Oct 2002	Bib.FRA	ADELAIDE	Dummy	0
20	17	06 nov 2001	SCAT	ADELAIDE	Dummy	650
21	16	02 nov 2001	SCAT	ADELAIDE	Dummy	650
22	15	02 nov 2001	SCAT	ADELAIDE	With confirm.	650
23	14	02 nov 2001	SCAT	ADELAIDE	Dummy	650
24	13	02 nov 2001	SCAT	ADELAIDE	Dummy	650
25	12	02 nov 2001	SCAT	ADELAIDE	Dummy	400
26	11	02 nov 2001	SCAT	ADELAIDE	Dummy	400
27	10	02 nov 2001	SCAT	ADELAIDE	Dummy	4
28	9	18 feb 97	INSELLING	XXV	Without confir	294
29	6	18 feb 97	INSELLINN	FOUTXXV	With confirm.	3
30	3	18 feb 97	INSELLIN	XXV	Dummy	300

Options on the screen

Display report (+): select a report an then this option. This will result in the following screen:

The screenshot shows a software window titled "Vubis Smart - VSQADDC - [Conversion reports]". The window contains a table with the following data:

Type	Description	Percentage	Number
0	Conversion was successful	0.00	0
1	Conversion was successful (manual holdings)	0.00	0
2	Copy does not exist	0.00	0
3	Error in item file	0.00	0
4	Pattern is not in table	95.24	20
5	No changes done.	0.00	0
6	Not confirmed	0.00	0
7	You are not permitted to edit the item while it is being transferred or is at a managing location	0.00	0
8	Record is locked	0.00	0
9	No shelfmarks for record	0.00	0
10	This item is not attached to any record in your current database	0.00	0
11	Error in item or in description	4.76	1
12	Item belongs to another institution	0.00	0
99	TOTAL	100.00	21

The status bar at the bottom of the window displays: ContextID: 0 Connected 123 PNB/BD JINS CAPS NUM 16:45

Explanation

The number is displayed as a percentage of the total number of conversions attempted in the Percentage column, and as a simple count in the Number column.

0 Conversion was successful - displays the number of shelfmarks with no manual holdings that have been converted.

1 Conversion was successful (manual holdings) - displays the number of shelfmarks with manual holdings that have been converted.

Remarks: Shelfmarks with manual holdings strings

For a good understanding of this explanation it is important to realise that the conversion of a shelfmark can cause items to be moved to an existing shelfmark. For the precise significance of the concept "manual holdings string", please refer to the "Shelfmark for types 2 and 4" paragraph in the description of AFO 111 (Cataloguing).

If a manual holding string is linked to the old (to be converted) or the new shelfmark (if the conversion moves an item to an existing shelfmark), the system will accept that the holdings data has been manually manipulated. This means that the holdings string for the old shelfmark will be added to the holdings string for the new shelfmark whether this is manual or not.

In extreme cases this can lead to quite surprising (and sometimes undesired) effects, for example that for the conversion of five items, the same holdings string will be linked to the new shelfmark five times. However, not respecting the "manual character" of a holdings string would be totally contrary to the functionality created; thus the new holdings string must also be maintained by the cataloguer. Records to which a shelfmark is linked whose manual holdings string will be changed by the conversion, are included separately in the reports, so that you have the possibility to place these bib records in a save list and thus efficiently monitor and, if desired, modify the holdings strings as they appear after the conversion.

2 Copy does not exist - displays the number of copies that have been removed from the shelfmark since the savelist was created, and that could not be converted.

The longer the length of time between creating the savelist and running the actual conversion, the greater the chance of copies being removed from the savelist's shelfmark.

3 Error in item file - displays the number of shelfmarks that could not be converted due to errors in the bibliographic record.

4 Pattern is not in table - displays the number of shelfmarks that did not match the patterns in your selected conversion table and could not be converted.

5 No changes done - displays the number of shelfmarks that could be converted manually, but that you decided not to convert manually.

6 Not confirmed - displays the number of shelfmarks that you decided not to confirm, when using the "With confirmation" option, or when doing a manual conversion.

7 You are not permitted to edit the item while it is being transferred or is at a managing location - displays the number of shelfmarks that could not be converted due to the shelfmarks' attached copies being moved to other locations.

8 Record is locked - displays the number of shelfmarks that were attached to locked records during your conversion process, and that could not be converted.

9 No shelfmarks for record - displays the number of records with no shelfmarks to convert.

10 This item is not attached to any record in your current database - displays the number of records in your selected savelist that were not in the database when you ran the conversion, or that belonged to another database.

The longer the length of time between creating the savelist and running the actual conversion, the greater the chance of records being removed from the database.

11 Error in item or in description - displays the number of shelfmarks that could not be converted due to errors in their attached copy information, or errors in the shelfmark's parent record.

12 Item belongs to another institution - displays the number of shelfmarks belonging to other institutions, and could not be converted.

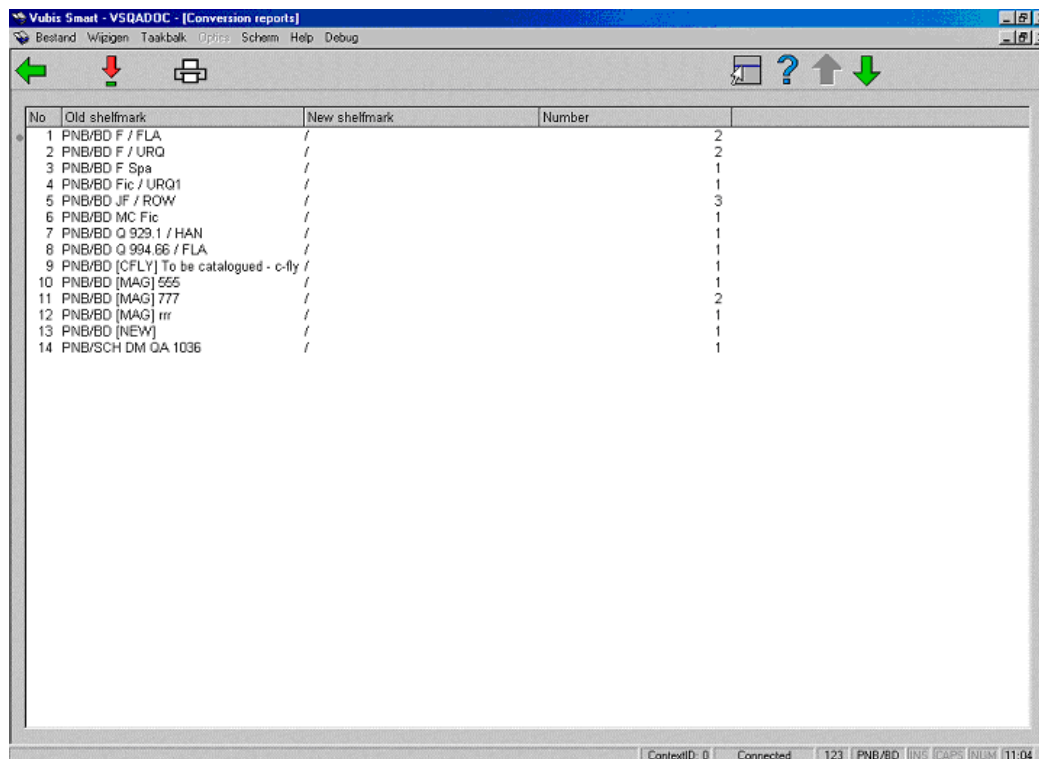
Shelfmarks can only be converted from within their own institution.

99 TOTAL - displays the total number of shelfmarks processed for holdings conversion, as a percentage, and as simple count.

This number can be larger or smaller than the number of holdings records in the savelist on which the holdings conversion was run.

Options on this screen

List of shelfmarks (+) - choose a line for more detail on the shelfmark concerned.



The screenshot shows a software window titled "Vubis Smart - VSQADOC - [Conversion reports]". The window contains a table with the following data:

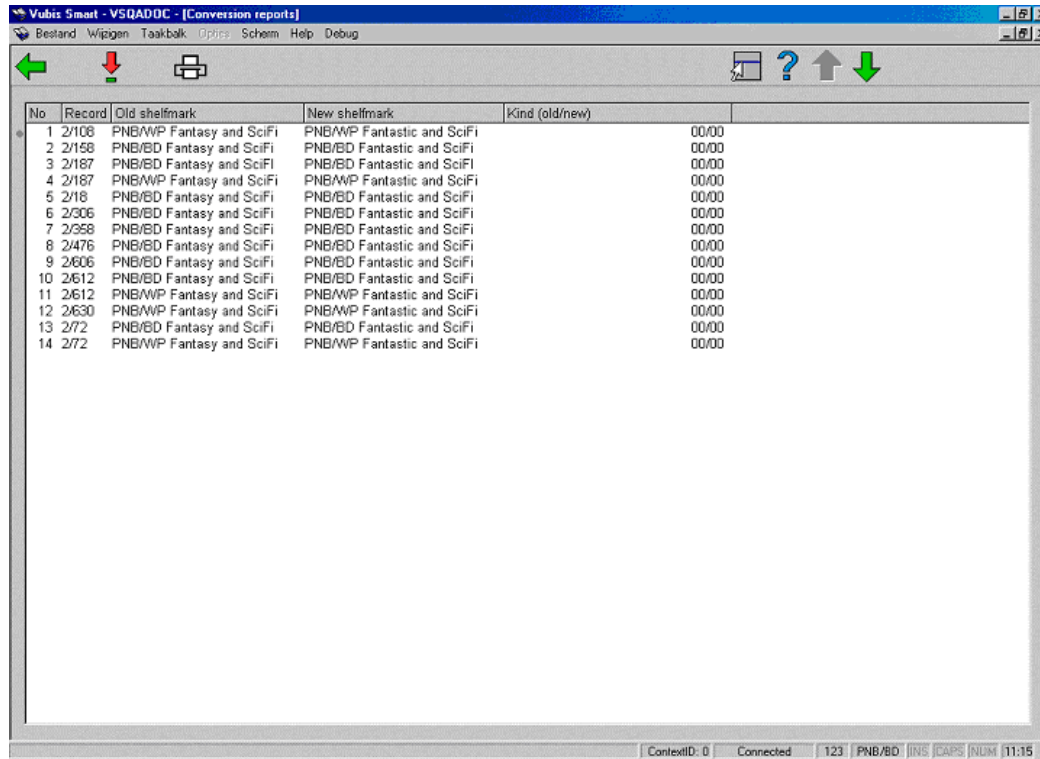
No	Old shelfmark	New shelfmark	Number
1	PNB/BD F / FLA	/	2
2	PNB/BD F / URQ	/	2
3	PNB/BD F Spa	/	1
4	PNB/BD Fic / URQ1	/	1
5	PNB/BD JF / ROW	/	3
6	PNB/BD MC Fic	/	1
7	PNB/BD Q 929.1 / HAN	/	1
8	PNB/BD Q 994.66 / FLA	/	1
9	PNB/BD [CFLY] To be catalogued - c-fly	/	1
10	PNB/BD [MAG] 555	/	1
11	PNB/BD [MAG] 777	/	2
12	PNB/BD [MAG] rrr	/	1
13	PNB/BD [NEW]	/	1
14	PNB/SCH DM QA 1036	/	1

Options on this screen

Display description (+) - choose a shelfmark to see the bibliographic record to which it is linked.

Print summary - choosing this option will allow you to use the standard output procedure.

List of descriptions (+) - choose a line for more detail on the shelfmark concerned.



The screenshot shows a software window titled "Vubis Smart - VSQADOC - [Conversion reports]". The window has a menu bar with "Bestand", "Wijzen", "Taakbak", "Opties", "Scherm", "Help", and "Debug". Below the menu bar is a toolbar with icons for back, forward, search, and other functions. The main area contains a table with the following columns: "No", "Record", "Old shelfmark", "New shelfmark", and "Kind (old/new)". The table lists 14 records, each with a unique record number, an old shelfmark, a new shelfmark, and a "00/00" value in the "Kind" column.

No	Record	Old shelfmark	New shelfmark	Kind (old/new)
1	2/108	PNB/W/P Fantasy and SciFi	PNB/W/P Fantastic and SciFi	00/00
2	2/158	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
3	2/187	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
4	2/187	PNB/W/P Fantasy and SciFi	PNB/W/P Fantastic and SciFi	00/00
5	2/18	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
6	2/306	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
7	2/358	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
8	2/476	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
9	2/606	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
10	2/612	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
11	2/612	PNB/W/P Fantasy and SciFi	PNB/W/P Fantastic and SciFi	00/00
12	2/630	PNB/W/P Fantasy and SciFi	PNB/W/P Fantastic and SciFi	00/00
13	2/72	PNB/BD Fantasy and SciFi	PNB/BD Fantastic and SciFi	00/00
14	2/72	PNB/W/P Fantasy and SciFi	PNB/W/P Fantastic and SciFi	00/00

Options on this screen

Display description (+) - choose a shelfmark to see the bibliographic record to which it is linked.

Print summary - choosing this option will allow you to use the standard output procedure.

Labels (+) - choose a line to create labels for the shelfmark concerned.

Delete report - choosing this option will result in the report being deleted.

Fill SL (+) - choose a line to add the details of the shelfmark concerned to an existing savelist or to create a new one.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	Creation	
2.0	May 2006	Various revisions Delivered as part of build 17 set	