

AFO 631 – Global change

631.1 Introduction

Global change is by far the most powerful method for modifying data within the system. The feature enables users to change all kinds of data in multiple records at one time.

Global change supports changes to the following data files:

- bibliographic records
- authority records
- borrower records
- holdings records.

Note

Global change for holdings records is managed through a separate AFO, “Global change holdings” (AFO 123) and is not further discussed in this section.

The system supports the following global change functions:

- replace data (change in (sub)field X “A” to “B”)
- transform data (these are typography changes, e.g. change in (sub)field X “a” to “A”)
- copy (sub)field (copy the content of (sub)field X to (sub)field Y)
- move (sub)field (move the content of (sub)field X to (sub)field Y)
- flip (sub)field (move the content of (sub)field X to (sub)field Y and the content of (sub)field Y to (sub)field X)
- delete (sub)field (delete (sub)field X from the record)

- add (sub)field (add (sub)field X to the record)
- order (sub)field (change the order of the (sub)field within the record; only for bibliographic records and authorities)

The 'replace data' function will also allow the user to append data to a (sub)field and remove data from a (sub)field.

631.1.1 Basic workflow principles [//]

The workflow is designed in such a way that it combines ease of use with a number of built-in security margins. Because this option offers the possibility to change all records in the database as part of one process, the effects of a faulty conversion can be extremely frustrating. In order to prevent these potential risks, the system contains a considerable number of safety measures that help to avoid some of the risks. These principles are described in this paragraph.

Principle 1: never run global change on the basic file, but always on a save list

The global change actions never run on a basic file (e.g. the borrowers) but on a save list that contains a selected number of records (e.g. borrower records). This gives the user an extra layer of security (if his action does not produce the expected result, he always knows exactly which records are involved).

Principle 2: define the work that needs to be done in a profile

Multiple global change profiles can be defined that can be re-used at any time. The profiles contain a list of the data that needs to be changed (e.g. change every "A" to "B" in field XXX). Note that one profile can contain changes to multiple fields or subfields.

Principle 3: offer multiple change methods and allow dummy changes

The system distinguishes between three types of changes:

- dummy conversion: imitates the conversion process, but does not actually execute any conversion (i.e. the records remain unchanged, but one can review the expected result, in an attempt to reveal errors in the conversion profile without running the risk of actually making the modifications to the files);
- without confirmation: converts the records in the save list;

- with confirmation: converts the records in the save list and requests a confirmation per record.

Before actually performing the conversion, you can use the 'dummy conversion' to reveal errors in the conversion table, without running the risk of actually making the modifications to the files. We recommend that you run dummy conversions until the conversion is completely correct.

The option 'With confirmation' is quite suitable for converting a small number of descriptions/objects. Given that the system requests confirmation per record, this option is not suitable for converting a large number of records.

Principle 4: provide reports and other control functions

Each global change type produces a report with the results of the action, allowing the user to review the effects of his conversion.

Principle 5: "uniformity" of testing

After a record has been modified by global change, the system performs a number of record checks. In principle, these tests are identical to those that are applied if a record is modified in regular editing mode.

So if you change an authorised (sub)field in a bibliographic record in such a way that it changes to a form that should not be used in a record (e.g. the rejected form) you will get an error message and the change will not be performed.

The same principle should also insure that you cannot change an authority record in such a way that it's normalised form would be identical to another authority record. This should also generate an error message.

631.1.2 Explanation of rules[//]

A global change profile is a set of rules that are evaluated in a specific order. Examples of such a rule are e.g. "transform the content of field 200/\$b in each bibliographic record to uppercase" or "replace the string 'abc' to the string 'xyz' in the Notes field of a borrower record".

Rule type

Each rule has a type (replace, transform, move, etc.) that defines the type of global change that will be executed.

Rule processing order

In two cases, the rule order in the profile is of great importance. These cases are:

1. if the rule type is "Replace" (replace string "A" by string "B")

In these cases the following applies. For each record in the save list, the rules in the profile are evaluate one after each other, until a rule that applies is found. If a valid rule is found, processing for the (sub)field stops and the system moves to the next (sub)field in the record. By consequence, it is relevant (if possible) to store the rules that are most likely to be valid at the beginning of the global change profile, as it will improve performance.

or

2. if one or more restrictions are attached to the rule (see below for more information on restrictions).

The system evaluates the rules in the profile sequentially. If restrictions are attached to a rule, the restrictions are evaluated. If the outcome of the evaluation is positive, the system will execute the rule and stop processing the (sub)field. If the outcome of the evaluation is negative, the system will move to the next rule, until it finds a rule that can be executed or until the end of the profile is reached.

If no restriction is attached to the rule *and* if the rule type is not "replace", the rule order is not relevant, as it will be executed anyhow.

Rules are processed in sequential order. Smart ordering of the rules can, as mentioned, improve performance significantly. However, as you can truncate data, it is extremely import that rules are ordered correctly to achieve the desired result. If truncated strings are used, the sequence of the conversion criteria in the conversion table should always be from specific to general.

Note that rules and restrictions are *always* applied to the record as it is stored in the system before global change accessed it. This processing method has been selected to assure that Global Change does not do successive changes on a record.

Example:

You want to convert all strings that begin with 399 to strings that begin with RED 399 and you want to convert all strings that begin with 39 convert to strings that begin with GREEN 39. To get the system to do this you define a profile with the following rules:

- Change 399@ to RED 399@

- Change 39@ to GREEN 39@

If you run this profile as specified every string starting with 39 would be changed to GREEN 39 including the strings starting with 399. Or in other words no string would be changed to RED 399.

The first way to correct this is by adding a restriction to the second rule. That restriction should check that the string is *not* of the format 399@. This restriction would ensure that any string starting with 399 is not changed by the second rule.

The second way to correct this is by changing the order of the rules in the profile to:

- Change 39@ to GREEN 39@
- Change 399@ to RED 399@

If the first rule changes a string starting with 399 to GREEN 399 the second rule will overrule that change and change the string to RED 399 because the *original* record still conforms to the 399@ test.

Restrictions

Furthermore, restrictions can be applied to each rule. These restrictions allow you to define one or more restrictions for each rule.

An example of such restrictions is e.g.: you want to add a field to a set of borrower records, based on the content of another field. You would achieve this by taking the following steps (note that these are very high level steps):

1. Store the borrower records in a save list.
2. Define a global change profile that contains a number of rules that each has a restriction attached to them.

Example:

No.	Rule	Restriction
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1	add field X with value ABC	only if field Y = 123
2	add field X with value DEF	only if field Y = 124
3	add field X with value GHI	only if field Y = 125
4	add field X with value JKL	only if field Y = 126

3. Apply the profile to the save list.

The result of this action would be that field X is added to the records. If field Y has a value of 123, field X will get the value ABC; if field Y has a value of 124, field X will get the value DEF, etc.

In principle, all data elements that belong to the file (bibliographic, authority or borrowers) that is being processed can be used for restrictions. It is not possible to use data elements from other files than the one that is being processed.

Note

Blocked records are never processed by the global change routine.

Rule groups

In most cases the functionality offered by the rules and restrictions on rules will be adequate but in those cases where the user needs more control over the actions a global change profile will perform the system allows the use of rule groups.

Note

The use of rule groups is optional. If a user does not define rule groups all rules are part of a virtual rule group called 'general'.

The use of rule groups will allow the user to specify a relation between different rules in a global change profile. Examine the following global change profile.

No	Rule	Rule group	Restriction
1	add subfield 700/\$a with value Asimov	n/a	only if 700/\$a is not equal to Asimov
2	add subfield 700/\$b with value I.	n/a	
3	change order of field 700 to first in record	n/a	
4	add field 690/\$b with value JKL	n/a	

This example implies a (conceptual) relation between the first three rules, namely that rule 2 and 3 should only be executed *if* rule 1 is executed *and* those rules should only be applied on the field added by rule 1.

The relation between those three rules is that the profile should add an author field (tag 700) with Asimov as last name (subfield \$a) and I. as first name (subfield \$b) and show that tag as the first tag of any record it's added to.

The rule groups allow you to specify such a relation between rules. In this example the first three rules should be in the same rule group.

The fourth rule is another addition (tag 690, subfield \$b) to any record. This rule has no (conceptual) relation to the other rules. In this example this rule is part of the 'general' rule group.

In this case you should define the profile as show here. Note that the rule group called 'Add author tag' is just an example.

No	Rule	Rule group	Restriction
1	add field 690/\$b with value JKL	n/a	
	Add author tag [group 1]		

2	add subfield 700/\$a with value Asimov	1	only if 700/\$a is not equal to Asimov
3	add subfield 700/\$b with value I.	1	
4	change order of field 700 to first in record	1	

Specific notes for bibliographic records global changes

Subfields that are pointers to other records (either authority links or bibliographic links) cannot be used in a replace rule.

Subfields that contain data coming from other bibliographic records (e.g. subfields of the type 'reference slave') cannot be used in global change.

The following criteria from the "Technical" node of a bibliographic record can be used in a replace rule:

- Deletion permitted
- Include in index
- Modification permitted
- Publication type
- Record status
- Template last used

All other criteria from that node cannot be used in global change.

Logical elements and groups cannot be used in global change.

Specific notes for authority records global changes

Subfields that are pointers to other authority records cannot be used in a replace rule.

The following criteria from the "Technical" node of an authority record can be used in a replace rule:

- Deletion permitted
- Include in index
- Modification permitted
- Record status
- Template last used

All other criteria from that node cannot be used in global change.

Logical elements and groups cannot be used in global change.

Specific notes for borrower records global changes

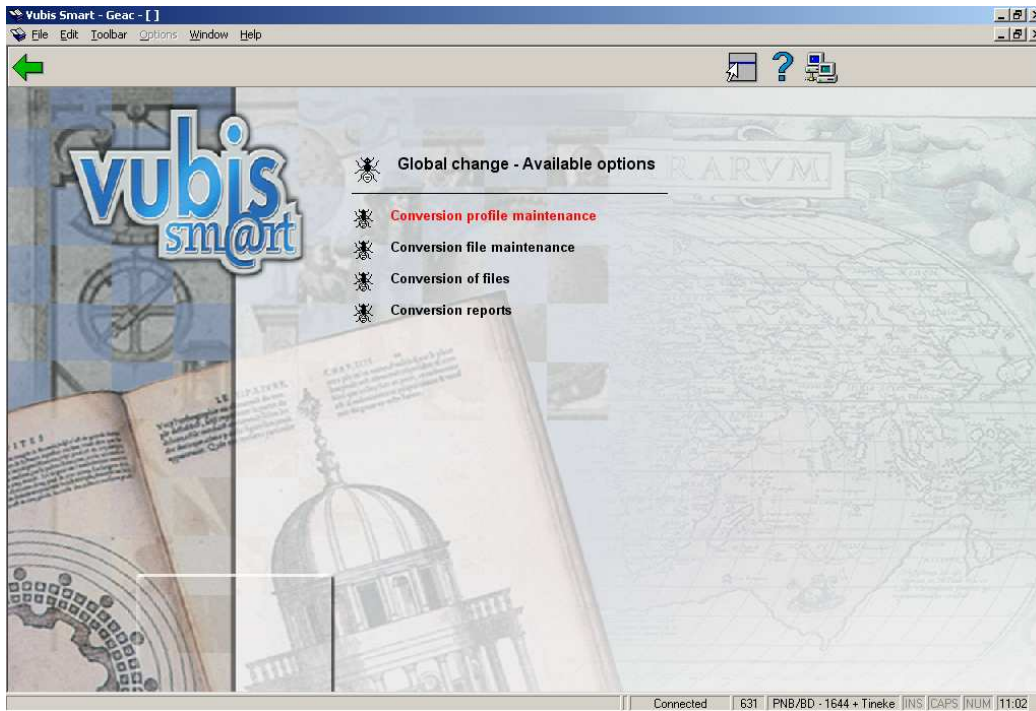
In general all (sub)fields which are interactively activated/defined through AFO 482-> Borrower definition settings should be available for global change.

The following (sub)fields are an exception to that rule and are **not** available for global change:

- bar code of borrower
- related borrower bar code
- back link related borrower bar code
- relation type of related bar code
- back link relation type of related bar code

- institution code
- location code
- borrower category
- membership registration date
- membership last renewal date
- membership due date
- membership type
- missing card : system note
- outstanding membership fee
- name and surname (the automatically created forms based on data entered in last name, first name, etc. subfields).

After choosing this AFO a submenu is displayed:



Each option is described in the following sections.

631.2 Conversion profile maintenance

After choosing this option, the following screen is displayed:

No.	Application	Profile name	Date - time	Comments	Number of rules	Maximum number of errors
1	Authorities	ROMAN	23 Jan 200	Correct romaniza	1	9999999
2	Bibliographic de	008test	24 Jun 200	Marc21 008	1	9999999
3	Bibliographic de	504a-rx	26 May 20	move 504 if 700	4	9999999
4	Bibliographic de	Add300	11 Apr 200	300 note added	1	9999999
5	Bibliographic de	Add328	30 May 20	Ajout zone 328	3	10
6	Bibliographic de	Add504b	06 Jun 200	Add \$b to 504	1	9999999
7	Bibliographic de	AddAnnotation	06 Apr 200	Add annotation t	1	9999999
8	Bibliographic de	AllowedStatus	20 Jul 2005	Change bib statu	1	9999999
9	Bibliographic de	Change210in211	01 Jun 200	Change210in211	1	9999999
10	Bibliographic de	Chg245on472	24 May 20	Bootstrap to Sho	1	9999999
11	Bibliographic de	Chg300	24 May 20	Change number o	1	9999999
12	Bibliographic de	DouwetestGlobalChang	30 May 20	commentaar	1	9999999
13	Bibliographic de	Filllove2	08 Jun 200	test	1	9999999
14	Bibliographic de	Filllove3	08 Jun 200	test pi-sign	1	9999999
15	Bibliographic de	Filllove4	08 Jun 200	test	1	9999999
16	Bibliographic de	Filllove5	08 Jun 200	test	1	9999999
17	Bibliographic de	Filllove6	08 Jun 200	test	1	9999999
18	Bibliographic de	Filllovech	08 Jun 200	add 101/\$b	1	9999999
19	Bibliographic de	ModifTitre	01 Jun 200	ModifTitre	1	9999999
20	Bibliographic de	Move500a	25 Aug 20	Move500a	1	9999999
21	Bibliographic de	SmartLang	24 Jun 200	Change 101\$a	1	9999999
22	Bibliographic de	SmartNoDelete	06 Jun 200	Change delete fla	1	9999999
23	Bibliographic de	TemplateChg	06 Jun 200	Change template	1	9999999
24	Bibliographic de	TestList	08 Jun 200	Authority list test	2	9999999
25	Bibliographic de	TestNov21Fre	21 Nov 200	TestNov21Fre	0	9999999
26	Bibliographic de	chgcase	08 Jun 200	Uppercase	1	9999999
27	Bibliographic de	copy504	27 May 20	copy504 to 500	3	9999999
28	Bibliographic de	delm21fd100	15 Feb 200	Delete 100 (M21)	1	9999999
29	Bibliographic de	dyssey	03 Jun 200	dyssey	1	9999999
30	Bibliographic de	flowerpower	24 Jun 200	flowerpower	1	9999999

Options on the screen

Create a new profile: Select this option to create a new profile. See section 631.2.1.

Select a profile (+): Select a profile and then this option to look at the rules. See section 631.2.1.

Delete a profile (+): Select a profile and then this option to delete it. The system will ask for confirmation.

View/modify general properties of a profile (+): Select a profile and then this option to modify the general properties (name, comments, number of errors).

Copy a profile (+): Select a profile and then this option to create a new profile based on characteristics of the selected profile. A form is displayed which allows you to define a new profile name and comments.

631.2.1 Create new profile

Create a new profile: Select this option to create a new profile. After choosing this option an input form will be displayed:

New conversion profile

Profile name

Comments [dut]

Comments [eng]

Comments [fre]

File to select from: Borrowers

Maximum number of errors: 9999999

Save settings

OK

Cancel

Help

Fields on the screen

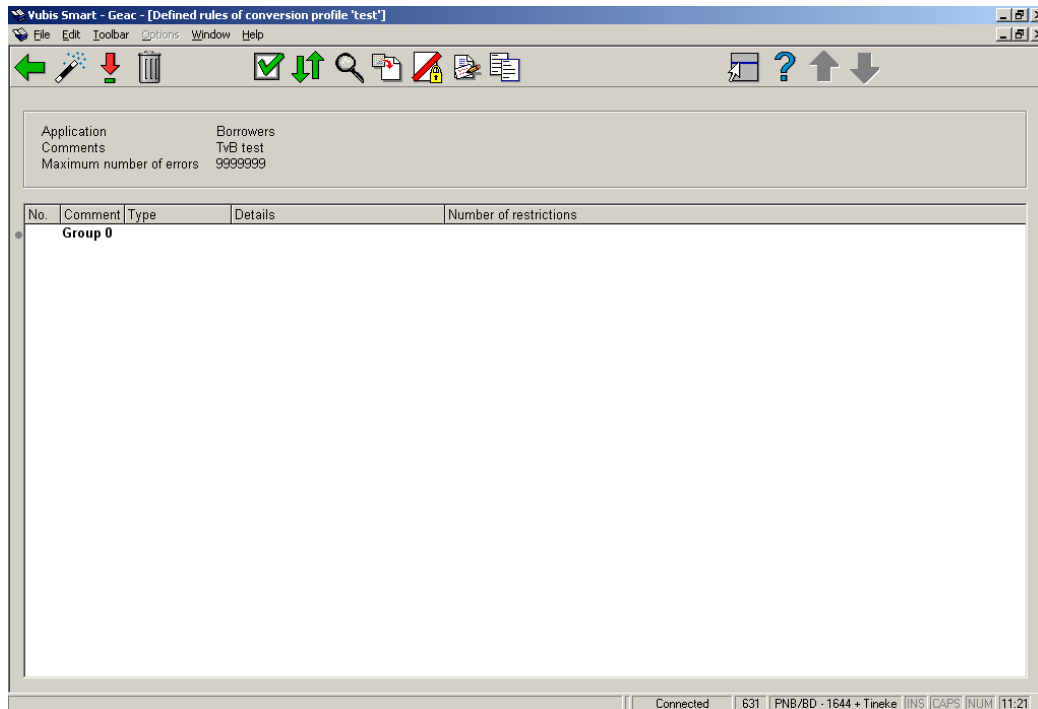
Profile name: Enter the name of the profile. The maximum length of the profile name is 30 characters. A profile name cannot exist of only punctuation characters.

Comments: Enter a description for each language. This comment can have a maximum length of 100 characters.

File to select from: Select the file to select the data elements from for this profile.

Maximum number of errors: Specify the number of errors, which will cause the execution of the profile to be halted if it is exceeded.

After you have submitted the form, the system takes you to the detail screen of the global change profile:



Options on the screen

Create a new rule wizard: To create a new rule, the system uses a wizard that will guide you through the rule creation process. See paragraph 631.2.2 for more details about this wizard.

View/modify the properties of a rule: If you select a rule, the system shows you the parameters that are attached to the rule. You cannot change the rule type. If you want to change the rule type, you have to delete the rule and add a new rule with a different type. If you want to change / view the restrictions for the rule, you have to use the **View/modify the restrictions for a rule** button.

Delete a rule: The system will ask you for a confirmation. If you confirm, the rule will be deleted and the rule numbers will be recreated.

View/modify the general properties of the profile: You can modify the general properties of the profile as described for the same option mentioned in paragraph 631.2 above.

Move a rule within the group of the selected rule: To move a rule in the list, follow these steps:

1. Select the rule that you want to move to another position in the list.
2. Click on the **Move Rule** button.

3. The system displays a form that allows you to indicate to what rule id you want to move the selected rule id. The selected rule will be moved to the position that you indicate and the rule numbers will be recreated.

View/modify the restrictions for a rule: Select a rule and then this option to view/modify the defined restrictions or add new restrictions. See paragraph 631.2.3 for more information.

Add a rule to a group: Select one or more rules from the 'general' group and click this button to add them to a (new) group. See paragraph 631.2.4 for more details.

Delete a rule from a group: Select one or more rules from a group and select this option to put the selected rules back in the 'general' group and the rule numbers will be recreated.

If a group does not contain rules when the user leaves the rules overview screen the group is deleted automatically and the group numbers will be recreated.

View/modify the properties of a group: Select any rule from group and select this option to change the properties of the group.

Copy restrictions: Select a rule and then this option to copy the restrictions form this rule to another. The system will present a list of rules to copy to.

631.2.2 Create new rule wizard

Create a new rule wizard: To create a new rule, the system uses a wizard that will guide you through the rule creation process.

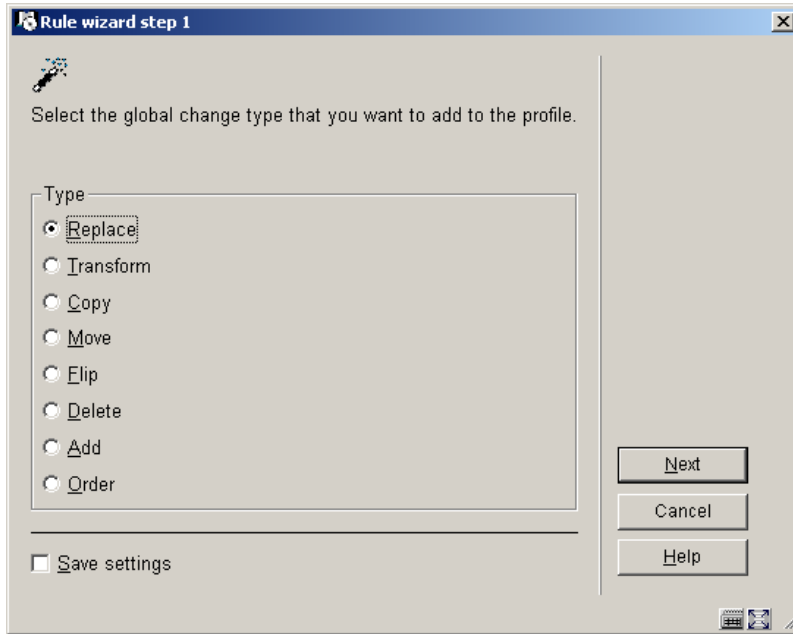
To create a new rule, the system uses a wizard that will guide you through the rule creation process. This process consists of a number of steps; the actual number of steps depends on the rule type (in almost all cases there are two steps).

Note

All forms of the Wizard process have the following buttons (if appropriate): **Previous**, **Next** and **Cancel**. The first form does not have the **Previous** button. The last form does not have a **Next** button but a **Finish** button. If the **Cancel** button is activated, the process is terminated. The system will ask for a confirmation.

Wizard Step 1 – Select the rule type

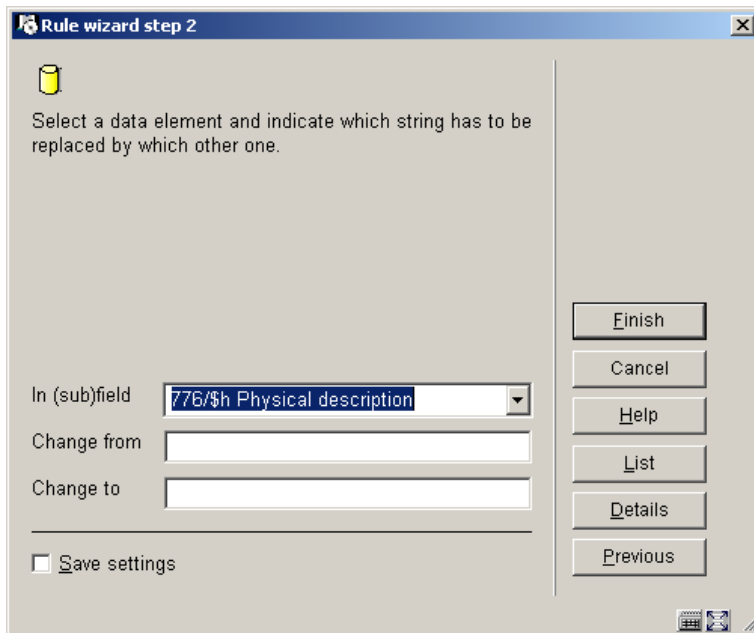
Select the appropriate rule type from the list of available types.



Depending on the selection step 2 will offer different options.

Wizard Step 2 – Replace data

Select to which data element the rule has to be applied and which data string has to be replaced by which other one.



The button "**List**" allows the user to select a valid option from data elements, which point to an authority list. The button "**Details**" allows the user to see details about a data element.

You can use the Replace type to remove parts of data from a field and to append data at the end or at the beginning of a field. The following table explains these specifics.

From	To	Explanation	Example of change (input is ABCA)
A	B	String A will be replaced by string B	BBCB
A@	B@	String A will be replaced by string B if the string begins with A	BBCA
@A	@B	String A will be replaced by string B if the string ends with A	ABCB
@	A@	Append the string A at the beginning of the string	AABCA
@	@A	Append the string A at the end of the string	ABCAA
A		Replace the string A with nothing	BC
A@		Replace the string A at the beginning of the string with nothing	BCA
@A		Replace the string A at the end of the string with nothing	ABC
\@	*	Replace the character "@" by a star; if the "@" (add-sign) character is preceded by a "\" (backslash), the system no longer interprets it as the truncation character, but as a regular character	ABCA [no change as the string does not contain the @ character]
*	\@	Replace the character "*" by an add-sign; if the "@" (add-sign) character is preceded by a "\" (backslash), the system no longer interprets it as the truncation character, but as a regular character	ABCA [no change as the string does not contain the * character]

Both "From" and "To" data strings cannot contain more than one add-sign.

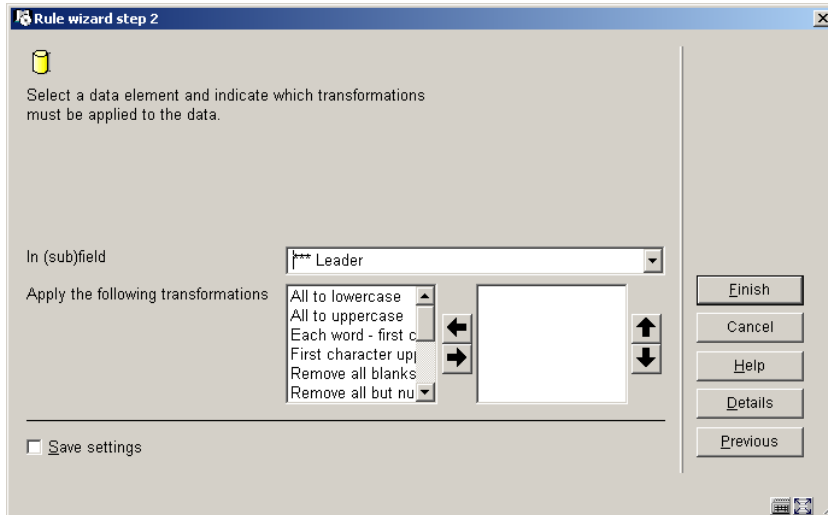
The @ character (add-sign) is used as the truncation character. If one wants to "global change" the add-sign as a character (and not as the truncation indicator), it should be preceded by the backslash (\).

Note

All examples in the previous table are case sensitive.

Wizard Step 2 – Transform data

Select to which data element the rule has to be applied and which transformations must be applied, and in which order they must be applied.



The button "**Details**" allows the user to see details about a data element.

The following transformations can be used:

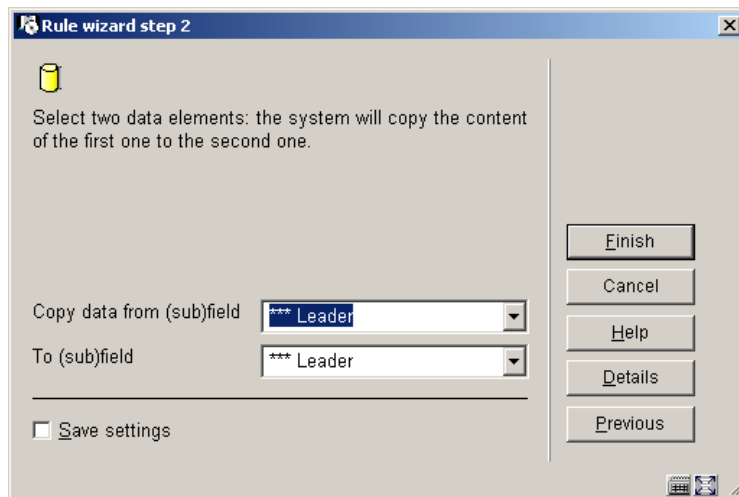
- all to uppercase
- all to lowercase
- first character uppercase
- each word - first character uppercase
- remove all but numeric characters
- remove all punctuation
- translate all punctuation to (nothing)
- translate all punctuation to . (a dot)
- translate all punctuation to – (a dash)
- translate all punctuation to blanks

- remove all blanks
- remove articles
- remove all stop words

The list of valid transformations is identical to the list that is available in AFO 482 and 469.

Wizard Step 2 – Copy (sub)field

Select the (sub)field that has to be copied and the (sub)field to which it should be copied.

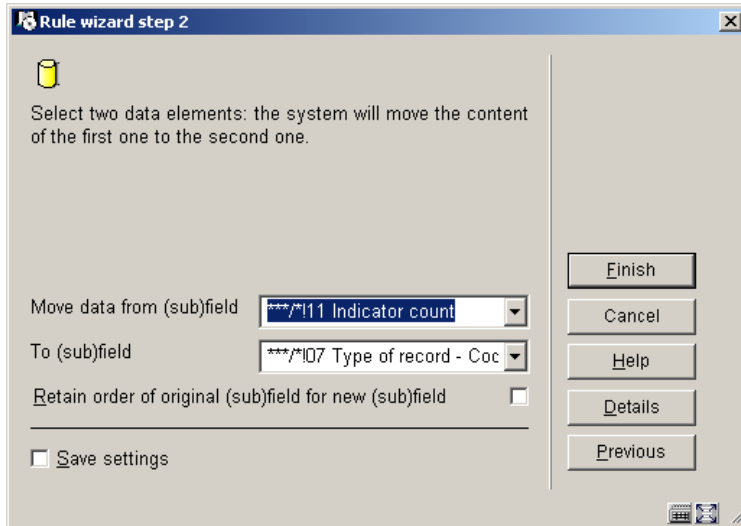


The button "**Details**" allows the user to see details about a data element.

Both data elements ("from" and "to") have to be of the same type, i.e. both have to be either fields or subfields. The "From" and "To" data elements cannot be the same data element.

Wizard Step 2 – Move data

Select to which data element the rule has to be applied by selecting the (sub)field that has to move and the (sub)field to which it should be moved.

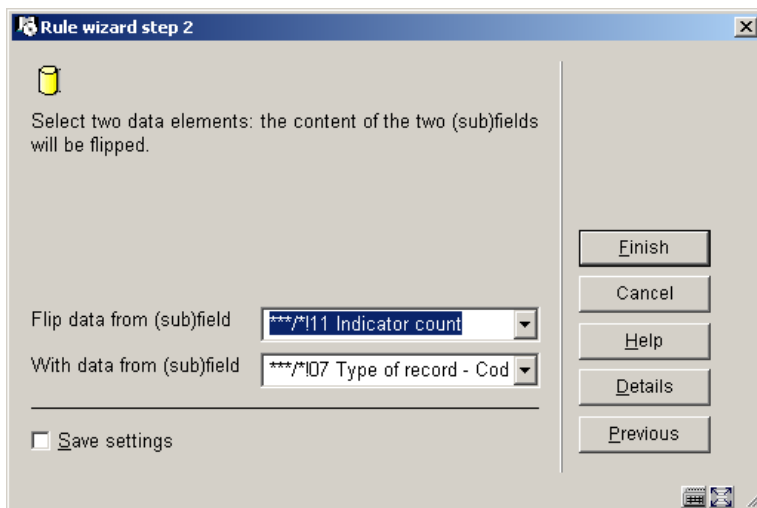


The button "**Details**" allows the user to see details about a data element.

Both data elements ("from" and "to") have to be of the same type, i.e. both have to be either fields or subfields. The "From" and "To" data elements cannot be the same data element.

Wizard Step 2 – Flip data

Select the two fields of which the content has to be flipped.

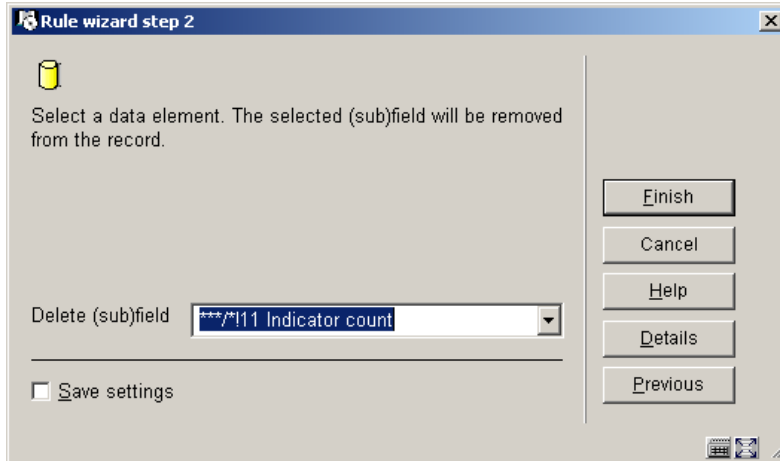


The button "**Details**" allows the user to see details about a data element.

Both data elements ("from" and "to") have to be of the same type, i.e. both have to be either fields or subfields. The "From" and "To" data elements cannot be the same data element.

Wizard Step 2 – Delete (sub)field

Select to which data element the rule has to be applied. The **(sub)field** will be removed from the record.

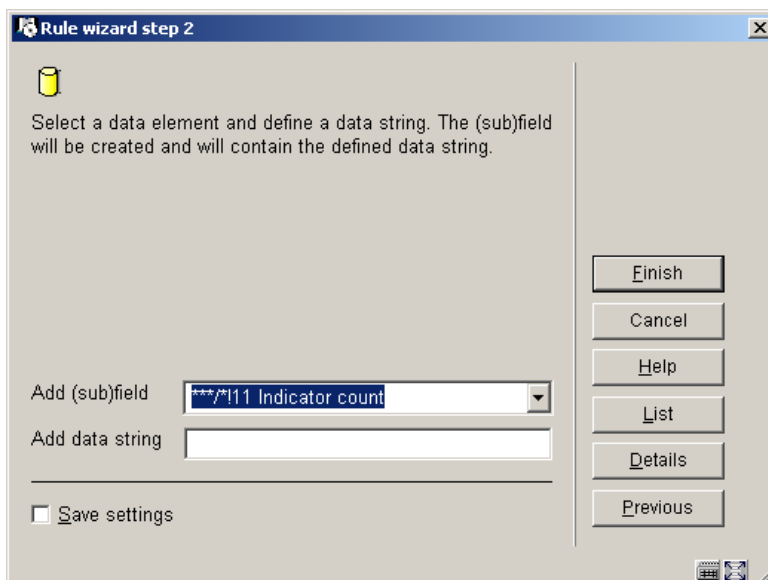


The screenshot shows a dialog box titled "Rule wizard step 2". It contains a yellow trash can icon and the text: "Select a data element. The selected (sub)field will be removed from the record." Below this is a dropdown menu labeled "Delete (sub)field" with the selected option "*/11 Indicator count". At the bottom left, there is a checkbox labeled "Save settings" which is currently unchecked. On the right side, there is a vertical stack of buttons: "Finish", "Cancel", "Help", "Details", and "Previous".

The button "**Details**" allows the user to see details about a data element.

Wizard Step 2 – Add (sub)field

Select a data element and define a data string. The **(sub)field** will be created and will contain the defined data string.

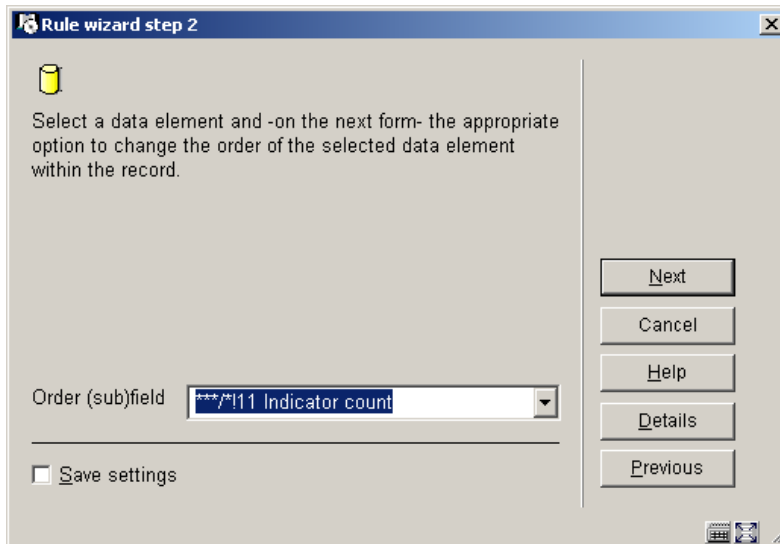


The screenshot shows a dialog box titled "Rule wizard step 2". It contains a yellow trash can icon and the text: "Select a data element and define a data string. The (sub)field will be created and will contain the defined data string." Below this are two input fields: "Add (sub)field" with a dropdown menu showing "*/11 Indicator count" and "Add data string" with an empty text box. At the bottom left, there is a checkbox labeled "Save settings" which is currently unchecked. On the right side, there is a vertical stack of buttons: "Finish", "Cancel", "Help", "List", "Details", and "Previous".

The button "**List**" allows the user to select a valid option from data elements, which point to an authority list and. The button "**Details**" allows the user to see details about a data element.

Wizard Step 2 – Order (sub)field

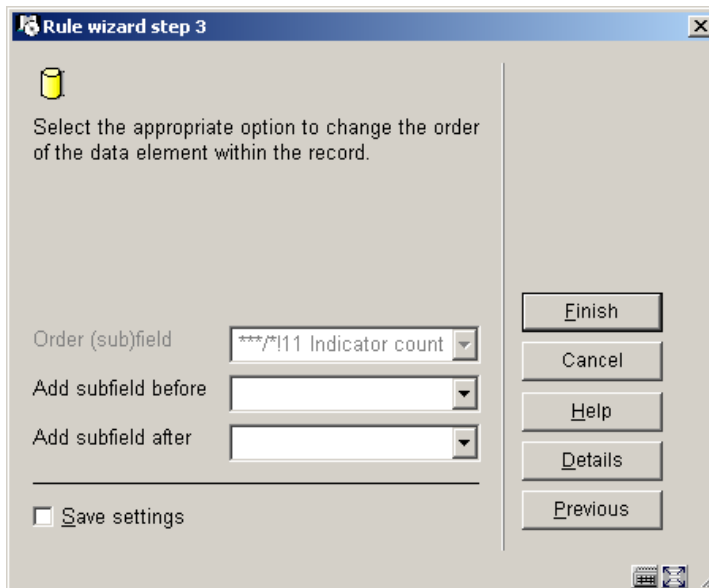
Select the data element to change the order of within the record.



The screenshot shows a dialog box titled "Rule wizard step 2". It contains a yellow trash can icon and the instruction: "Select a data element and -on the next form- the appropriate option to change the order of the selected data element within the record." Below this, there is a dropdown menu labeled "Order (sub)field" with the text "*/11 Indicator count" selected. At the bottom left, there is a checkbox labeled "Save settings" which is currently unchecked. On the right side, there is a vertical stack of five buttons: "Next", "Cancel", "Help", "Details", and "Previous".

The button "**Details**" allows the user to see details about a data element.

This is the only option that offers a step 3 for the wizard:



The screenshot shows a dialog box titled "Rule wizard step 3". It contains a yellow trash can icon and the instruction: "Select the appropriate option to change the order of the data element within the record." Below this, there are three dropdown menus: "Order (sub)field" (with "*/11 Indicator count" selected), "Add subfield before", and "Add subfield after". At the bottom left, there is a checkbox labeled "Save settings" which is currently unchecked. On the right side, there is a vertical stack of five buttons: "Finish", "Cancel", "Help", "Details", and "Previous".

Select the action appropriate for the selected data element to specify how the order of the data element should be changed within the record.

If the selected data element is a field, there will be:

- a dropdown list containing all fields from the format and the extra option 'the start of the record' ["Add field before"]
- a dropdown list containing all fields from the format and the extra option 'the end of the record' ["Add field after"]

If the selected data element is a subfield, there will be:

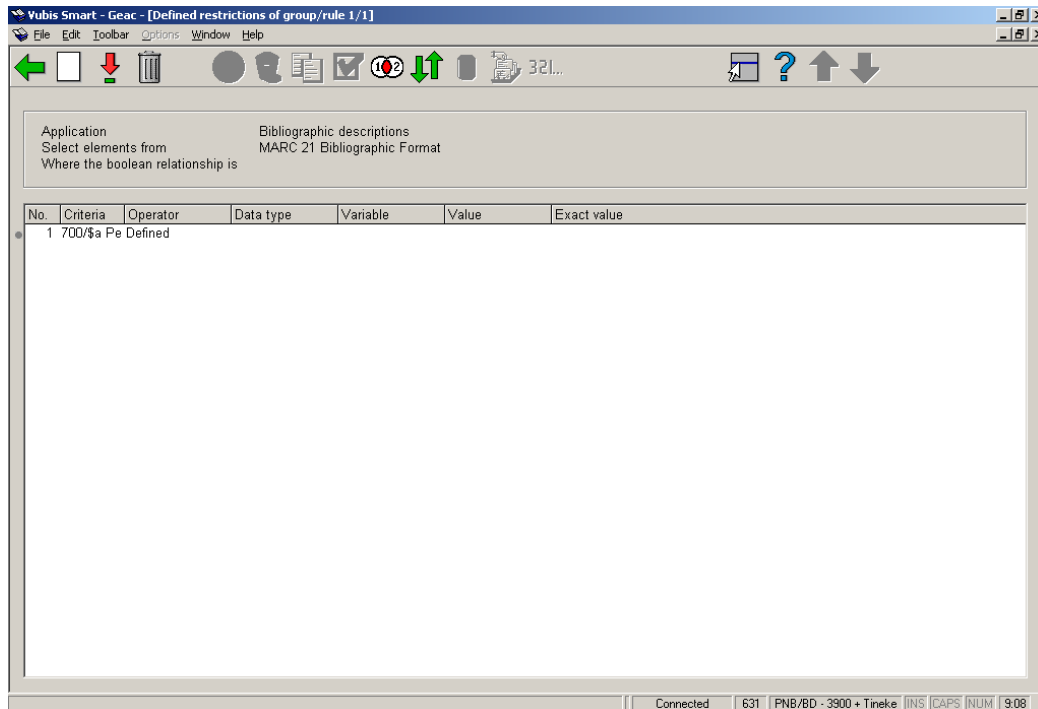
- a dropdown list containing all subfields of the field specified in the selected data element and the extra option 'the start of the record' ["Add subfield before"]
- a dropdown list containing all subfields of the field specified in the selected data element and the extra option 'the end of the record' ["Add subfield after"]

631.2.3 View/modify restrictions for a rule

View/modify the restrictions for a rule: If you activate the view restrictions for a rule button, the system navigates to the restriction overview screen.

The restriction overview screen is largely identical to the SSP selection profile screen as used in AFO 141->selections.

Above the list of defined restrictions for the selected rule the system shows the Boolean relationship between the restrictions. For each restriction the following data is shown: **criteria**, **operator**, **data type**, **variable**, **value** and **exact value**.



Options on the screen

New criteria: Choose the option to create new criteria. See section 631.2.3.1.

Change criteria (+): Select a criterion and then this option to modify it. The same form as for new criteria is presented. See section 631.2.3.1.

Delete criteria (+): Select a criterion and then this option to delete it.

Note

Deleting a restriction can make the Boolean expression invalid. If this is the case, the system will show a warning and remove the Boolean expression. You will have to redefine a correct expression.

Savelist to the web parameters: This option is only relevant in AFO 141 and therefore not active here.

Delete profile: This option is only relevant in AFO 141 and therefore not active here.

Copy profile (+): This option is only relevant in AFO 141 and therefore not active here.

View/modify profile comments: This option is only relevant in AFO 141 and therefore not active here.

Boolean relationship: If you do not add a Boolean relation to the profile, the system will automatically assume the Boolean relation to be "AND". With this option you can set another Boolean relationship. See section 631.2.3.2.

Move criteria (+): The system will show a form where you can specify the new (line) number of the selected restriction. After pressing **OK** the system will insert the restriction at the specified number. Any existing restriction with that number and all restrictions coming after the specified number will be automatically moved one number down.

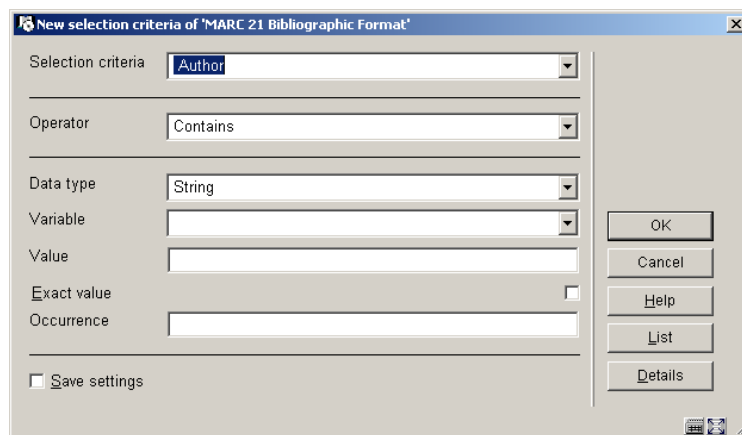
Select elements from: This option is only relevant in AFO 141 and therefore not active here.

Go to last generated savelist: This option is only relevant in AFO 141 and therefore not active here.

Execute selection: This option is only relevant in AFO 141 and therefore not active here.

631.2.3.1 Add new criteria

New criteria: Choose the option to create new criteria. An input form is shown:



The screenshot shows a dialog box titled "New selection criteria of 'MARC 21 Bibliographic Format'". It contains several input fields and buttons. The "Selection criteria" dropdown is set to "Author". The "Operator" dropdown is set to "Contains". The "Data type" dropdown is set to "String". The "Variable" and "Value" fields are empty. The "Exact value" checkbox is unchecked. The "Occurrence" field is empty. There is a "Save settings" checkbox at the bottom left. On the right side, there are buttons for "OK", "Cancel", "Help", "List", and "Details".

Fields on the screen

Selection criteria: Select a criterion from the list.

Operator: Select an operator from the list of available operators.

Data type: Select “String” or “Variable”.

Variable: Select a variable from the list of available variables.

Value: Type in a value. This can be any string.

Exact value: Indicate whether or not the Value has to be interpreted “exactly” (i.e. without any transformation) or “normalised” (i.e. transformed to uppercase).

The relationship between Variable and Value

If the Data Type “Variable” is selected, you can define both **Variable** and **Value** to achieve specific results. If you start Value with a plus (+) or a minus (-) sign, followed by a number, the system will add (+) or deduct (-) the number from the value of the **Variable**.

Example

If you define **Variable** as “Today” and **Value** as “+1”, the system will select the date of Today+1, which is tomorrow; if you define **Variable** as “1st January of Current Year” and **Value** as “-1”, the system will select the first day of the current year -1, which is the last day of the previous year.

631.2.3.2 Boolean relationships

Boolean relationship: If you do not add a Boolean relation to the profile, the system will automatically assume the Boolean relation to be “AND”. You can change the Boolean relation by using one of the following syntaxes.

Syntax	Boolean relation
AND	Boolean AND
OR	Boolean OR
NOT	Boolean NOT
Complex	See following section

“Complex” Boolean relations are expressed using the AND, NOT and OR operators and digits that refer to the restrictions in the profile.

Note

The evaluation of the string is pure left to right evaluation and that brackets should be used for nesting. Blanks will be automatically removed from the Boolean expression. The Boolean operators are *not* case-sensitive.

Some examples

Example	Comments	Identical to
1 OR 2	Criteria 1 OR Criteria 2	OR 1OR2 (1OR2) (1 OR 2) 1or2
(1 OR 2) AND 3	(Criteria 1 OR Criteria 2) AND Criteria 3	((1 OR 2) AND 3) (1OR2)AND3 (1 or 2) and 3 1 OR 2 AND 3 [Because the evaluation is pure left to right, brackets can be omitted in this case.]
(1 NOT 3) OR 2	(Criteria 1 NOT Criteria 3) OR Criteria 2	1 NOT 3 OR 2 [Because the evaluation is pure left to right, brackets can be omitted in this case.]
(1 OR 2) NOT (3 AND 4)	(Criteria 1 OR Criteria 2) NOT (Criteria 3 AND Criteria 4)	

Not that the Boolean expression cannot start with a Boolean operator. The following expressions are invalid:

- NOT (1 AND 2)
- NOT 3 OR 4

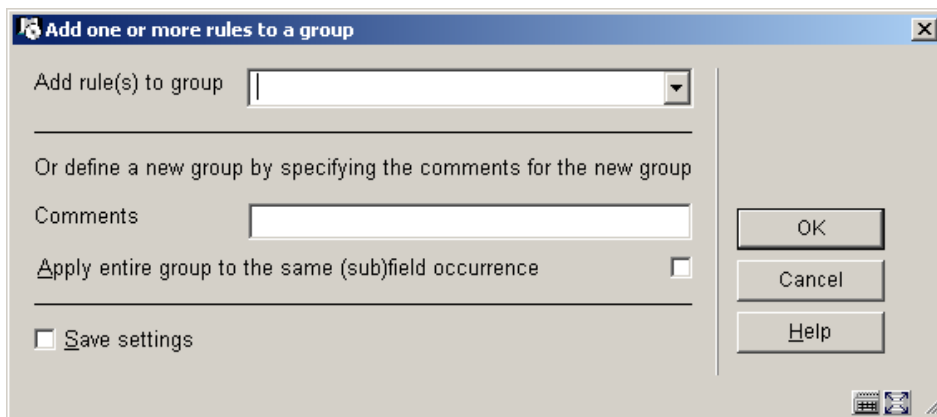
If you do not include all criteria in the Boolean expression, the ones that are not in the expression are automatically added to the expression with an AND relation.

Example

If a profile contains three restriction criteria and a Boolean expression “2 or 3” the system will automatically add the first criteria to the expression, which results in “2 or 3 and 1”. However, we advise you to include all criteria in the Boolean expression to avoid confusion.

631.2.4 Add a rule to a group

Add a rule to a group: Select one or more rules from the 'general' group and click this button to add them to a (new) group. An input form will be displayed:



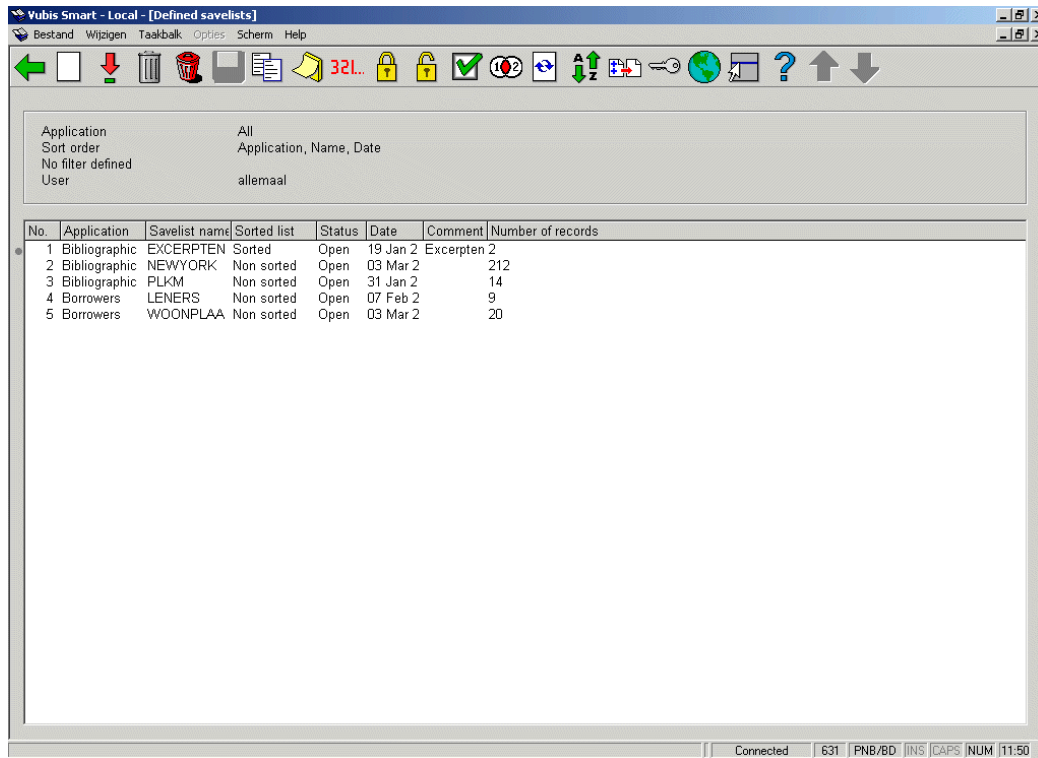
The screenshot shows a dialog box titled "Add one or more rules to a group". It contains the following elements:

- A dropdown menu labeled "Add rule(s) to group".
- A horizontal line.
- The text "Or define a new group by specifying the comments for the new group".
- A text input field labeled "Comments".
- A checkbox labeled "Apply entire group to the same (sub)field occurrence".
- A checkbox labeled "Save settings".
- Three buttons on the right: "OK", "Cancel", and "Help".
- Small icons for keyboard shortcuts and help in the bottom right corner.

You can either select a group from the dropdown list or define a new group by entering data in the **Comments** field.

631.3 Conversion file maintenance

After choosing this option an overview screen is displayed:



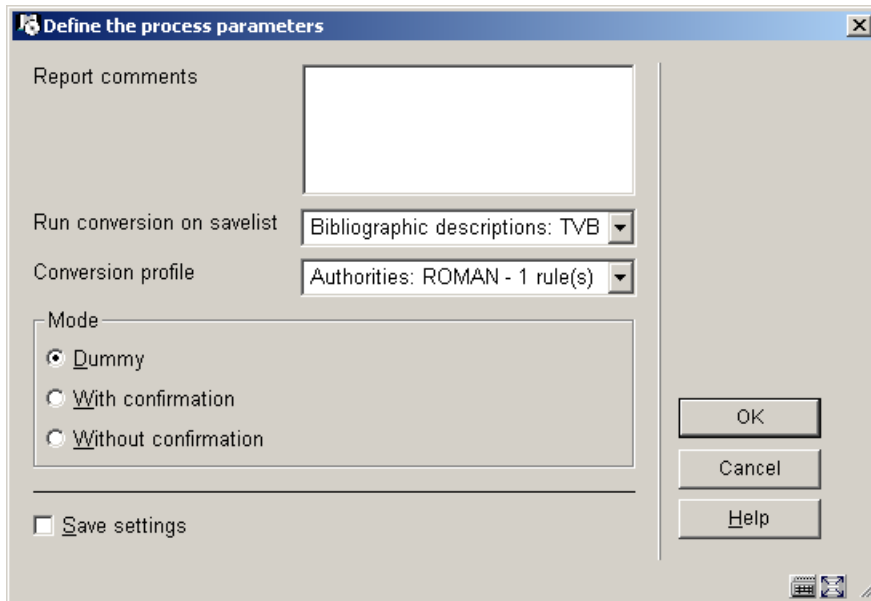
This option gives access to all options of save list management as if you selected through AFO 141->Save lists.

See the help on AFO 141 for more information about this screen and its options.

631.4 Conversion of files

Activating a global change process is a multi step process. The initial step of this process determines all following steps.

After selecting this option an input form is displayed:



Fields on the screen

Report comments (*optional*): Type in comments for the report. The comments cannot consist of only punctuation characters and has a maximum length of 3000 characters. The comments can be used to better identify global change processes.

Save list: Select the save list that you want to apply the global change profile to.

Profile: Select the global change profile that you want to use.

Mode: Select in which “mode” you want to run the process. This is either “dummy” mode, “with confirmation” mode or “without confirmation” mode. Dummy mode implies that the system runs the process as a “dummy” process; no changes are made to the actual data files. With confirmation mode implies that the system will ask a confirmation for each record: each record will be displayed (with a “before” and “after” version of the record) and you have to confirm each change. Only if you confirm the change will it be applied to the actual data. Without confirmation mode implies that the process changes the actual data without asking for individual confirmations.

The further process, after you have clicked **OK**, depends on the run mode that you have selected.

If you have selected “Dummy” mode

The system switches to the general procedure for starting processes. You can now start the process in online, batch or memory mode.

If you have selected “Without confirmation” mode

The system shows a warning: "You are going to modify the records in save list XXX. This save list contains YYY records. Cancel this process if you have not tested it by running it in dummy mode or if you have not checked the result reports of the dummy conversion. Have you tested this process in dummy mode?"

The system shows an additional warning if the selected profile has not been used in "dummy" mode before which strongly advises the user to test the profile first using "dummy" mode.

The system switches to the general procedure for starting processes. You can now start the process in online, batch or memory mode.

If you have selected "With confirmation" mode

For each record in the save list the system shows the following form. Confirm if the system has to apply the change to the actual data, or Cancel if no change has to be made.

For each record in the save list the system shows a confirmation form.

The screenshot shows a Windows-style dialog box titled "Confirm changes to record '2.492'". It contains an information icon and the text: "Please confirm if the changes that are displayed below have to be applied to the actual data files." Below this, there are three sections:

- Old version record:** A list box containing:
 - 200/\$a Adiamante
 - 200/\$b 2
 - 200/\$f L.E. Jr. Modesitt
 - 210/\$a New York
 - 210/\$c TOR
- New version record:** A list box containing:
 - 200/\$a Adiamante
 - 200/\$b 2
 - 200/\$f L.E. Jr. Modesitt
 - 210/\$a London
 - 210/\$c TOR
- Additional information:** A table with the following data:

Number of records to change	14
Number of records changed	1
Number of records not processed	0
Number of records skipped	2

On the right side of the dialog, there are four buttons: "OK", "Cancel", "Help", and "Stop".

This confirmation form allows you to see the record before any change is done and the record as changed by the profile and allows you to confirm those changes or not and to stop processing the save list entirely.

None of these fields can be modified.

The form contains the following buttons:

- **OK:** the change is applied to the actual data
- **Cancel:** the system skips the record (the change is not applied to the actual data) and moves to the next record in the save list
- **Stop:** stop the whole process

Note

Records in the save list are skipped automatically if none of the rules apply.

At the end of the process (this is either if the end of the save list is reached or if the process is stopped by the user), the system displays the summary Totals.

If the system encounters a software problem during the global change process it should:

- return the record to the state before processing of the record was started (not necessary if the process was started in "Dummy" mode)
- log the record in the appropriate error category of the report of the global change task
- continue with processing the next record from the save list.

631.5 Conversion reports

The system displays the reports of all global change tasks that have been processed by the system, in reverse chronological order (i.e. the most recent one is at the top of the list):

No.	Report id	Report comments	Savelist	Profile	Mode	Number of records	Number of errors	Number of records processed
1	165		TVB	Add328	With confir	1	1	0
2	164		TVB	D08test	With confir	1	0	0
3	163		OXLEMAIL	OXTENSIT	Without co	0	0	2
4	162		OXLEMAIL	OXTENSIT	Dummy	0	0	2
5	161		TEMP	geac2exte	Without co	9	9	63
6	160	change all Deb@ge	TEMP	geac2exte	With confir	0	69	3
7	159		MIKECGL	MIKECGL	Dummy	0	0	4
8	158	change deb@geac.	TEMP	geac2exte	Dummy	0	8	64
9	157		GANTY	CLEARCO	With confir	0	2	1
10	156		GANTY	CLEARCO	With confir	0	2	1
11	155		GANTY	CLEARCO	With confir	0	3	0
12	154		JAN2425	delm21fd1	Without co	0	3	3
13	153		JAN2425	delm21fd1	Dummy	0	3	3
14	152		ROMANIZ	ROMAN	Without co	0	0	1
15	151	Rom1	ROMANIZ	ROMAN	Dummy	0	0	1
16	150		DB2AUG30	flowerpower	Dummy	0	2672	10
17	149		FANTASY	flowerpower	Dummy	0	1	161
18	148		FRENCHS	flowerpower	Dummy	0	55	1
19	147		DB6GT700	Move500a	Dummy	0	58	13
20	146		DB6GT700	Move500a	Dummy	0	58	13
21	145		SMART11	AllowedSta	Without co	0	4	6
22	144		SMART11	AllowedSta	With confir	0	9	1
23	143		SMART11	AllowedSta	Dummy	0	3	7
24	142		DB6GT700	Move500a	Dummy	0	58	13
25	141		DB6GT700	move504	Dummy	0	71	0
26	140		SMART11	AllowedSta	Without co	0	10	0
27	139		SMART11	AllowedSta	Dummy	0	4	6
28	138		SMART10	AllowedSta	Without co	0	6	0
29	137		SMART10	AllowedSta	With confir	0	6	0
30	136		SMART10	AllowedSta	With confir	0	6	0

Columns on the screen

Report id: This is a number that is automatically handed out by the system.

Report comments: The description given to the report.

Save list: The savelist against which the process task was performed.

Profile: The profile used to perform the task.

Mode: The global change mode used.

Number of records in the save list.

Number of errors: This can be higher than the number of records in the save list as the same error can appear multiple times in the same record.

Number of records processed: This can be lower than the number of records in the save list if the conversion is run in "With confirmation" mode and if the process is terminated by the user before the end of the save list is reached.

If the execution of the task was halted due to the fact that there were too many errors reported by the task the system will show a warning icon in front of the task.

Options on the screen

View report details: Select a report and then this option to view the details. See section 631.5.1 for more details about this screen.

Delete a report: Select a report and then this option to delete it. The system asks for a confirmation.

631.5.1 View report details

The system displays a select list that contains an overview of all error types that appear in the report. At the top of the screen the system displays (in a bordered window) the same data elements that are shown on the overview screen of reports: task wording, save list, profile, global change mode, number of records in the save list, number of errors, number of records processed).

The select list displays the error type description, the number of records involved and the percentage in relation to the total number of records in the save list. [Please note that the total can be higher than 100% as the same record can be attached to multiple error types.]

The error types that are shown depend on the file type (application) that was processed (bibliographic, authority or borrower). On top of these file specific errors, the system shows the following information in the report:

- Conversion was successful

- Error encountered in record

- Record has incorrect format
[as in not the same format as the profile uses; only for authorities and bibliographic records]

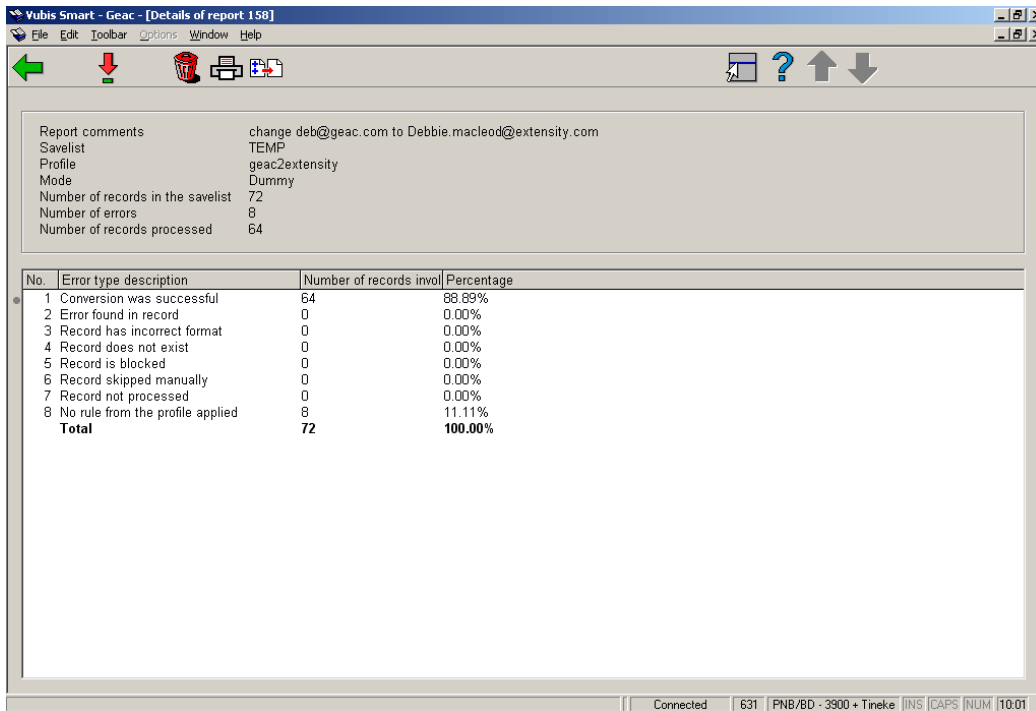
- Record does not exist

- Record is blocked

- Records skipped manually
[if a process is run in "With confirmation" mode]

- Records not processed
[if a process in "With confirmation" mode is cancelled]
- No rule from the profile applied

The total is mentioned at the bottom of the error list.



Options on the screen

Select an error type: If you select an error type, the system displays a select list that contains the records that are attached to the selected error type. See section 631.5.1.1 for more details.

Delete the report: Select a report and then this option to delete it. The system asks for a confirmation.

Print the report details: The system switches to the standard dialog for generating output.

Store the records in a save list: The system asks in which save list the records have to be stored. This can be an existing save list, but you can also create a new save list.

631.5.1.1 Select an error type

Select an error type: If you select an error type, the system displays a select list that contains the records that are attached to the selected error type.

No.	Record Id	Primary record wording
1	PNB.123488	MacLeod, just another borrower with replaced card
2	PNB.200200045X	A, Bo BO
3	PNB.200200046X	MacLeod, DAD
4	PNB.200200054X	abc, DÉÛpIÉ33. KId2888 copy
5	PNB.200200062X	MacLeod, DÉÛpIÉ33. KId2
6	PNB.200200063X	abc, DÉÛpIÉ33. KId2
7	PNB.200200069X	Ma, Da
8	PNB.200200071X	MacLeod, daddy-o as full record
9	PNB.200200082X	MACLEOD, DEBB (child here)
10	PNB.200200100X	borrower, new one
11	PNB.200200116X	borrower, new 211
12	PNB.200200118X	A, B
13	PNB.200200119X	macleod, 211B4 updated 24115
14	PNB.200200120X	macleod, new 211b4
15	PNB.200200121X	macleod, 211b4 in dutch
16	PNB.200200124X	MacLeod, reservations
17	PNB.200200127X	Blonk, E.M.C.copy
18	PNB.200200133X	macleod KIDDSVILLE
19	PNB.200200158X	macleod, new 22
20	PNB.200200163X	MacLeod, Good Patron for Checkouts Deb
21	PNB.200200200X	MACLEOD, Rocky
22	PNB.200399022X	MACLEOD, Lenen Loont Borrower
23	PNB.200399076X	Lenen, Loont jul12th Borrower for 2.3
24	PNB.200399111X	Watson, Whipper
25	PNB.200399112X	Watson, Willy with additional cards
26	PNB.200399113X	Watson, Wanda
27	PNB.200399114X	Watson, Werner
28	PNB.200399115X	Watson, William was with deposits
29	PNB.200399159X	Watson, WENDY WITH PHOTO COPIED
30	PNB.200399165X	MacLeod-Smith-Jones, Debbie

Multiple detail lines can exist for a single record as the same error can occur multiple times in the same record.

Options on the screen

Select a record: The old and new version of the record will be displayed in a pop-up screen.

Details of a record to get access to the regular record overview screen (of bibliographic, authority or borrower maintenance, i.e. AFO 111, 113 or 431)

Copy records to a savelist: to store the records in a save list

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	Creation Delivered as part of build 17 set	