

AFO 135 – OUF record loader

135.1 Introduction

Libraries who do their primary cataloguing and holdings maintenance in the PICA central database can now use the implementation of the OUF protocol in Vubis for automatic online updates of their local (V-smart) catalogue.

This means that the V-smart database will be kept up-to-date with respect to the PICA database, within a time delay that is as short as possible. Any changes in the PICA database that affect records or holdings of the local database will be applied to it.

PICA offers the so-called OUF (Online Update Fetch) system to facilitate this task. OUF notifies the local system of any changes that may be relevant and the local system then decides which data to retrieve from the PICA system for loading into the local database.

The OUF system generates files with so-called "update signals", which are units that describe a certain change in the PICA system that may affect the local database.

Based upon these units the V-smart software decides which records should be retrieved from the PICA system. It creates "fetch request files" with the corresponding PPN (PICA Production Number) for every record, which are then processed by OUF.

The records as retrieved by OUF from the PICA system are in PICA3 format and are stored in "title files".

Note

Infor has no control whatsoever over the signal files that are sent by Pica to the Vubis server: Pica determines the content of the signal files. This process cannot be influenced by the local (V-smart) system.

The OUF support is not a standard part of the application. It is sold as an add-on and requires a specific license. Please also note that Pica needs to be contacted for set-up prior to the implementation in V-smart.

135.2 OUF within V-smart

The implementation of the OUF protocol in V-smart basically results in a background process that constantly checks if the local V-smart database needs to be updated. This process has the following components.

- Check for update signals (sent from Pica to V-smart)

The application reads the oldest signal file from the signal files directory. It gets the next record from the signal list and stores it in the V-smart database. At the end of the signal file, the next oldest file is read.

- Create fetch request file (sent from V-smart to Pica)

Based upon the data imported from the signal files a file with one or more PPN ids is created and written to the request files directory.

- Read title file (sent from Pica to V-smart)

The oldest title file is read from the title files directory.

- Scan records for relations

The records from the title file are scanned for relations to other PICA records. A check is done for every relation record to verify if it already exists in the local database.

- Convert records

Apply the PICA3 to local-format conversion to the record. The records that are retrieved from the PICA database need to be converted before they can be loaded into the local system. This conversion is from PICA3 format to (e.g.) MARC21 or Smart format, and must be created with the V-smart conversion setup utility. Also, as part of the conversion a mapping must be done for the holdings data. The elements of the holdings data are mapped to predefined codes that the loader can interpret and process.

- Load records

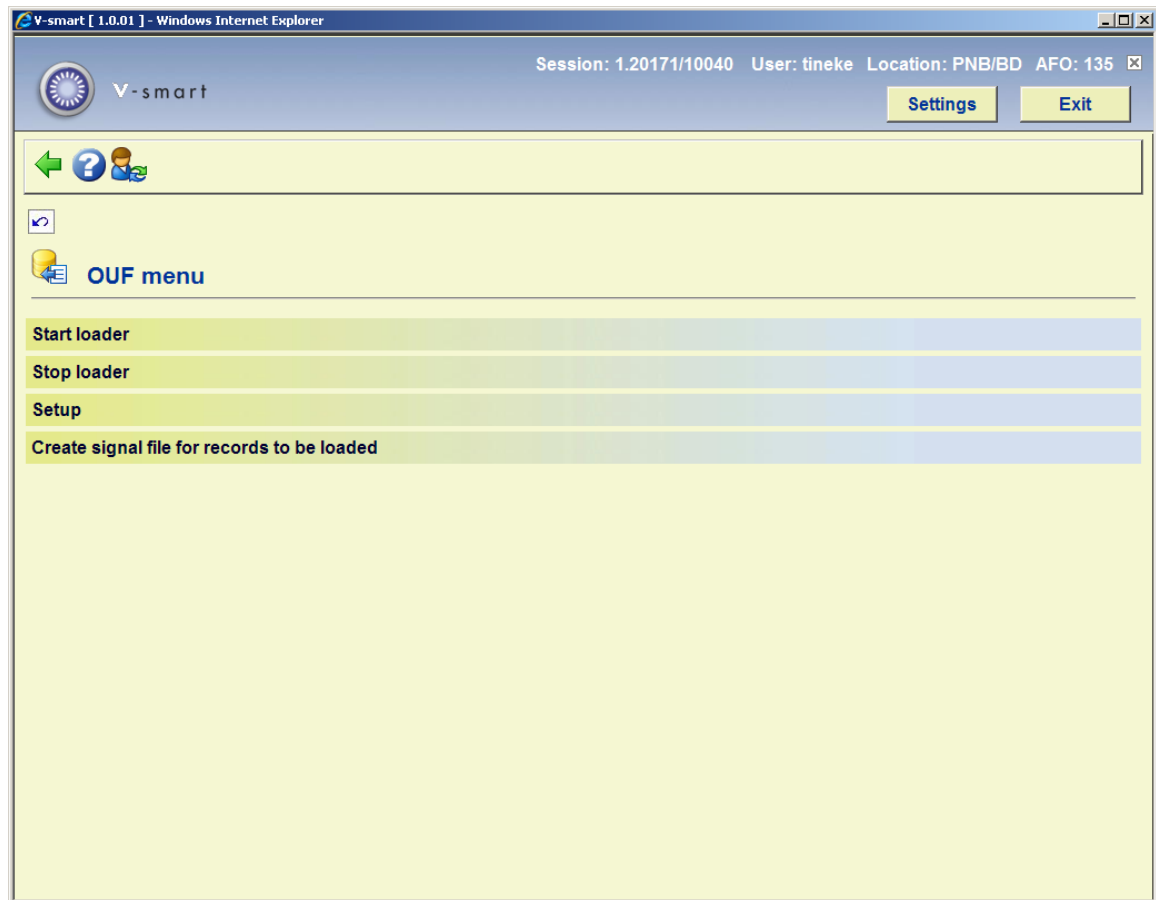
Based upon existing standard routines, the record is loaded into the local database. If it is a record deletion, the record is deleted.

- Update links between records

The links between the loaded records are created.

135.3 OUF

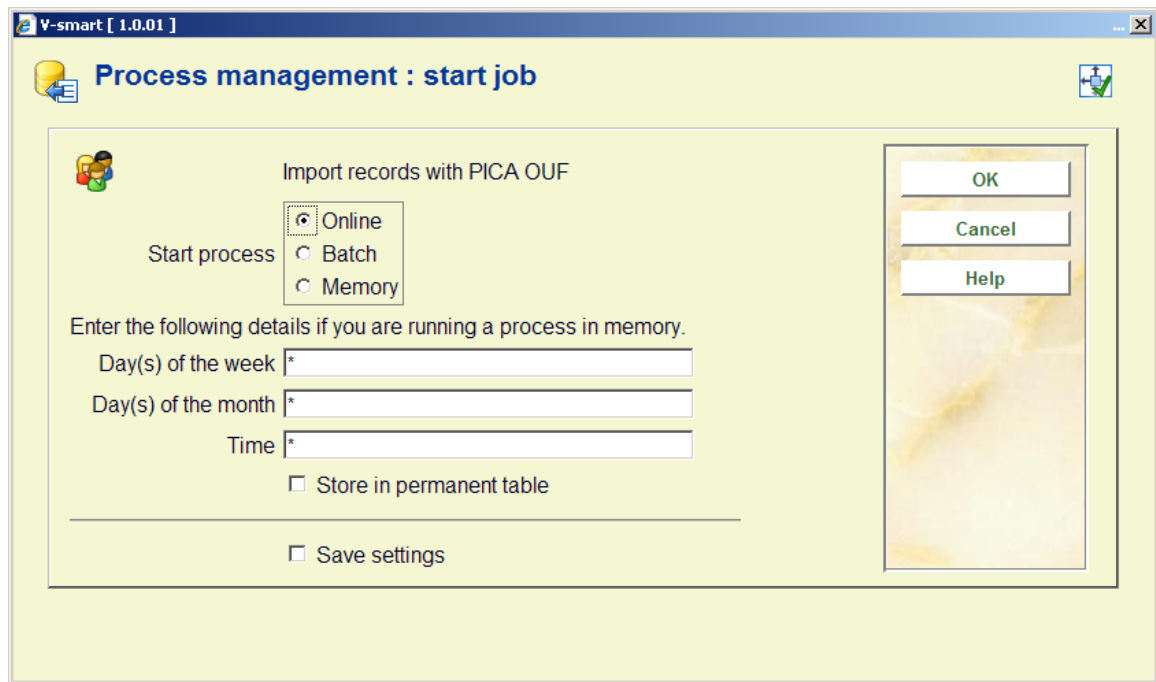
After choosing AFO 135 the following menu is displayed:



These options are described in the following paragraphs.

135.3.1 Start loader

When you choose this menu option the standard dialog screen for running processes is displayed:



The loader can be started in online mode, batch mode and memory, like most V-smart processes. In this case online mode will revert automatically to batch mode so in fact there are only two options.

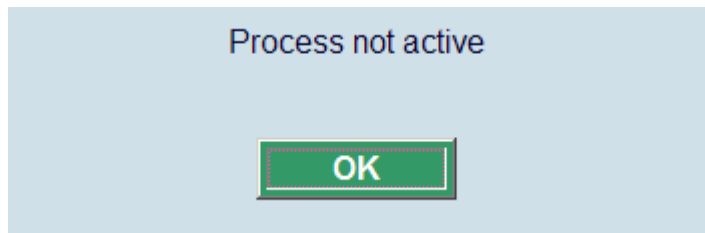
Once the loader is started it will stop in one of the following cases:

1. The user stops the loader from the OUF menu
2. The maximum number of runtime errors is reached
3. The stop time as indicated in the parameter has been reached
4. The date has changed

In case 2 the helpdesk should be contacted.

135.3.2 Stop loader

The loader can be forced to stop through the second menu option. If you choose this option when the process is not active, a message will be shown:



135.3.3 Setup

When you choose this menu option, an input screen is displayed:

A screenshot of the "OUF setup" dialog box. The title bar says "OUF setup" and there is a close button (x) in the top right. Below the title bar are two tabs: "General" and "FTP", with "FTP" selected. The main area contains several fields:

- Directory signal files: text input field
- Directory fetch files: text input field
- Directory title files: text input field
- Import profile bibliographic records: dropdown menu with "IMarcXchange" selected
- Import profile authority records: dropdown menu with "Default Multites" selected
- PPN index bibliographic records: dropdown menu with "Autbkbd" selected
- PPN index authority records: dropdown menu with "Aindex10" selected
- Number of days to keep logged data: text input field with "30" and an information icon (i)
- Maximum number of runtime errors: text input field with "10" and an information icon (i)
- Stop at (HH:MM): text input field with "20:00"

At the bottom, there are two checkboxes: "Process items" (checked) and "Test mode" (unchecked).

Fields on the screen

Directory signal files: this is where the OUF daemon stores the signal files

Directory fetch files: this is where the OUF daemon looks for fetch files

Directory data files: this is where the OUF daemon stores the data files

Import profile bibliographic records: choose the import profile from the dropdown list (this is defined in AFO 133)

Import profile authority records: choose the import profile from the dropdown list (this is defined in AFO 133)

PPN index bibliographic records: choose the name of the PPN index from the dropdown list

PPN index authority records: choose the name of the PPN index from the dropdown list

Number of days to keep logged data: the number of days that the logging data will be preserved; note that the reports are extracted daily from the logging data and stored elsewhere (AFO 642) – preserving the logging data for a number of days is just an additional security measure that can help to resolve problems. The recommended value: **30**.

Maximum number of runtime errors: when this maximum is reached the OUF loader will stop automatically (contact Infor support). . The recommended value: **10**.

Process items: This option should always be activated for normal item processing: deactivate this option if items should not be loaded. The recommended value: **activated**.

Test mode: if this option is activated the loader will not update the V-smart database; this option should only be activated for testing by Infor staff. The recommended value: **de-activated**.

Stop at: enter the time (HH:MM format) at which the loader should shut down

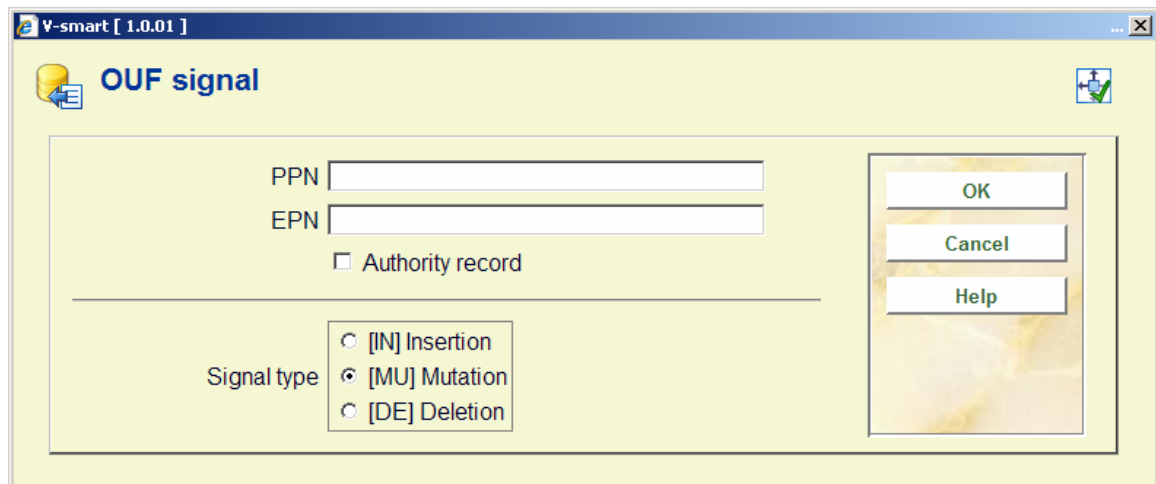
Note:

Some specific settings must be defined by Infor staff. They determine for which PICA3 fields relations should be retrieved. There are entries for authorities and for bibliographical records, in a special form.

This is for the upper level records for one-to-many relation types. When these records are updated they should save and restore the relations of the types that are enumerated in this setting. The values may be different, depending upon the system..

135.3.4 Create signal file for records to be loaded

When you choose this menu option, an input screen is displayed:



Fields on the screen

PPN: enter the required PPN

EPN: optionally enter the required EPN for this PPN (if only the one item must be loaded)

Authority record: (optional) check this if the record to be loaded is an authority record

Signal type: choose either Insertion, Deletion or Mutation

135.4 Reports

Every time that the OUF loader shuts down it will create a report that can be viewed via AFO 642, 'List of started jobs'.

Select the OUF process of which you want to see the report, and then select the **Process report** button.

If the loader is forced to shut down in an "irregular" way, e.g. by a system shutdown, it will create the report at the next time it is restarted.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	April 2008	creation	