

AFO 159 - Data dictionary/Template management for holdings

159.1 Introduction

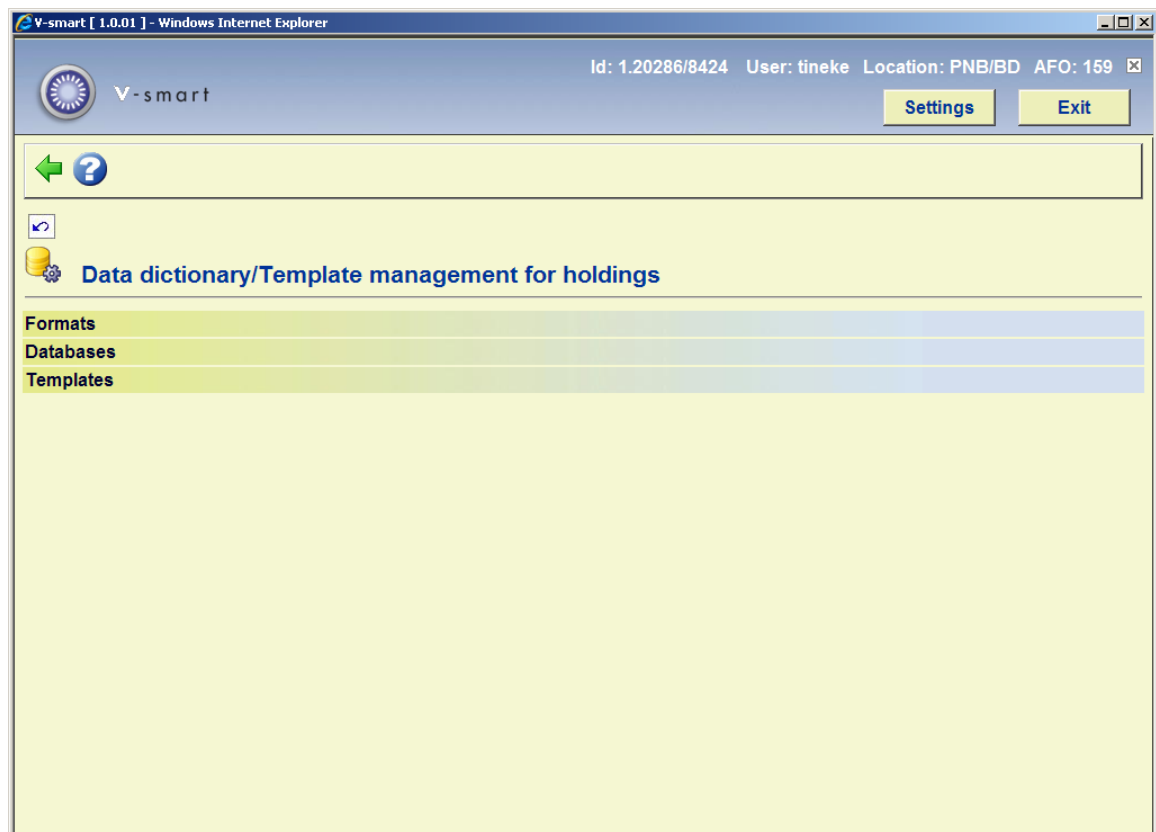
With this AFO you can maintain formats, databases and templates for holdings.

A holdings format contains the definition of which fields are part of a holdings record, which subfields each of the fields can have, what the characteristics are of fields and subfields, etc. This is similar to format definitions for bibliographic records and authorities.

Note

When the V-smart system is installed the MARC21/H and UniMARC/H formats, databases and templates are already defined. You are advised not make any changes to these, nor remove them. It is allowed to make small modifications to the templates (like color, wording).

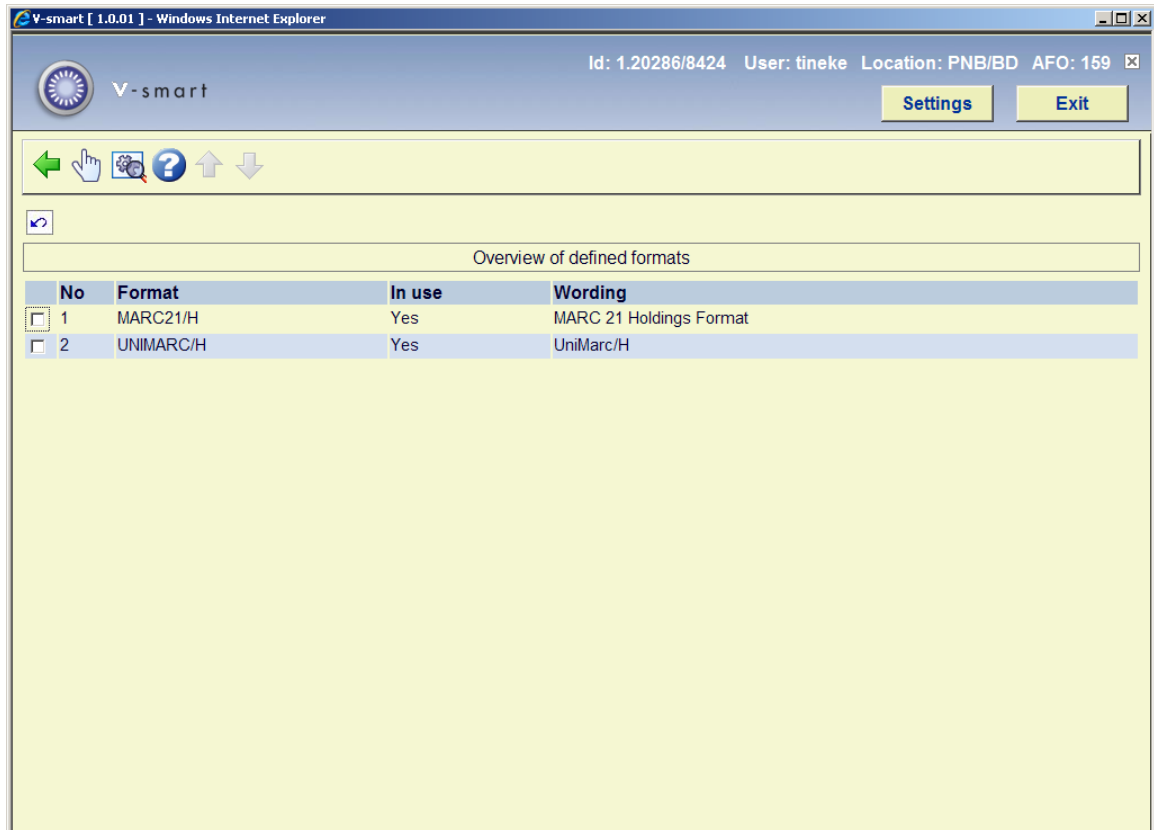
After choosing this AFO the following menu is presented:



The various options are described in the next paragraphs.

159.2 Formats

Go to AFO 159 and choose Formats, this will result in a list of holdings formats defined on your system:



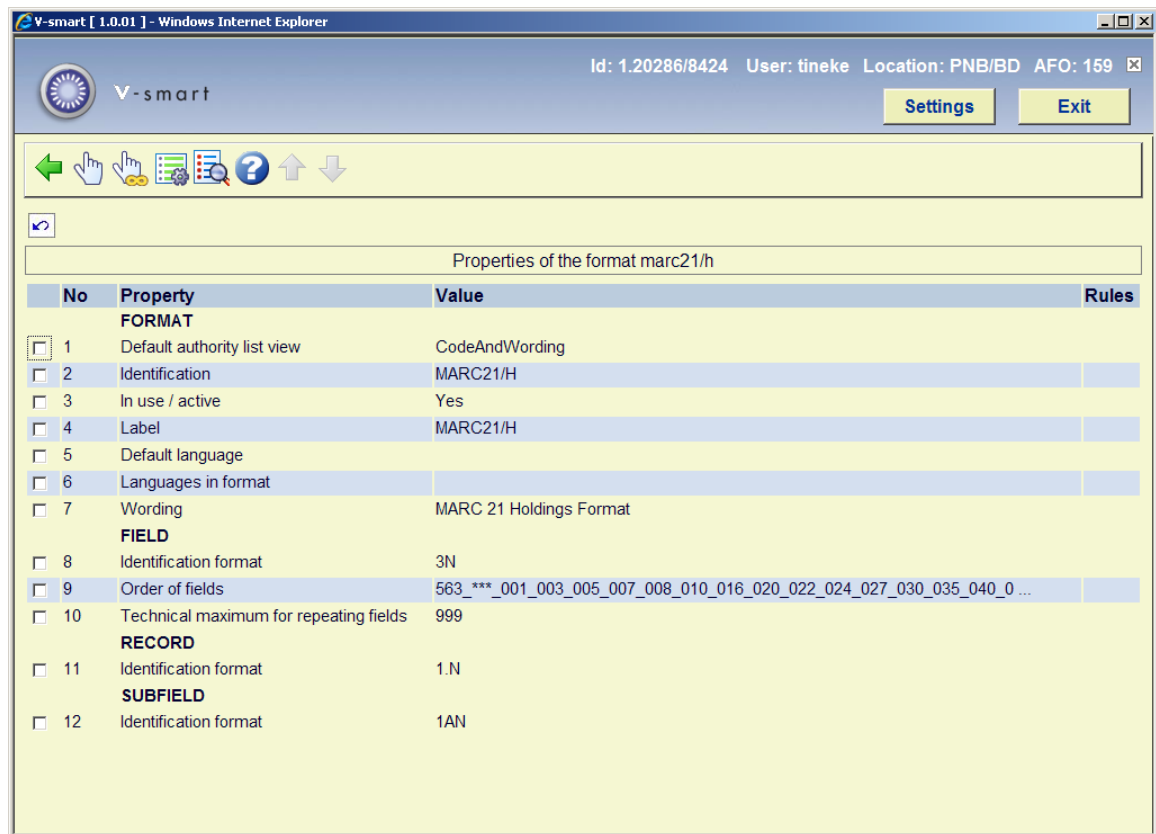
The screenshot shows a web browser window titled "v-smart [1.0.01] - Windows Internet Explorer". The page header includes a logo, the text "v-smart", and user information: "Id: 1.20286/8424 User: tineke Location: PNB/BD AFO: 159". There are "Settings" and "Exit" buttons. Below the header is a navigation bar with icons for back, home, search, help, and navigation. The main content area is titled "Overview of defined formats" and contains a table with the following data:

No	Format	In use	Wording
<input type="checkbox"/> 1	MARC21/H	Yes	MARC 21 Holdings Format
<input type="checkbox"/> 2	UNIMARC/H	Yes	UniMarc/H

Each format has its own properties. You can view these by selecting a format and then clicking on the icon **View properties of format**.

You can then change these properties by clicking on the icon **Change all properties**.

In the screen below you can change the general properties of a format. Normally it is not necessary to do this. Only when you design your own format will you need to do this.



A description of the properties shown on this screen:

Property	Description
Default authority list view	The way in which <i>authority lists</i> can be presented. You can choose between code only or code plus wording. For more information see the chapter on Authorities.
Identification	The name of the format. You can not change this after the format has been defined.
In use / active	You can tick a box to denote the format can be used. You cannot create a database with an inactive format.
Label	The name of the format as presented in lists etc. The label can be changed.
Default language	The language in which cataloguing will be done in special cases where a specific language cannot be defined.

Languages in format	V-smart supports multilingual fields, e.g. subject headings in multiple languages. Here you define which languages can be used.
Wording	Free text description of the format.
Identification format (Field)	Here you define how fields are named. The notation '3N' in the example means 3 numeric characters.
Order of fields	This property is not in use.
Technical maximum for repeating fields	Repeatable fields are "infinitely" repeatable in theory; but for technical purposes there is a maximum, which is defined here.
Identification format (Record)	<p>Records in a database have an identification. Usually this is a number. Here you define how identification is done. The "1.N" in the example means an infinite number of numeric characters.</p> <p>If you were to put "1.4N" here it would mean that the number identifying a record can consist of a maximum of 4 numeric characters, i.e. a maximum of 9999. Which means you cannot enter more than 9999 records on the database.</p>
Identification format (Subfield)	The definition for this is similar to the identification of records. The "1AN" in the example means one alpha numeric or numeric character.

159.2.1 The fields

As an example the fields of the MARC21/H format are shown. You can display this list by double clicking on the format in the overview screen.

V-smart [1.0.01] - Windows Internet Explorer

Id: 1.20286/8424 User: tineke Location: PNB/BD AFO: 159

V-smart Settings Exit

Fields of format 'marc21/h'

No	Field	Wording	Type	Mand.	Max.	In use	Subfields	Rules
<input type="checkbox"/>	1	***	Leader	Text	No	1	Yes *101,*106,*107,*108,*109,*110,*111,*112,*113,*118,*119,*120,*121,*122,*123,*124	No
<input type="checkbox"/>	2	001	Control number	Text	No	1	Yes	No
<input type="checkbox"/>	3	003	Control number identifier	Text	No	1	Yes	No
<input type="checkbox"/>	4	004	CONTROL NUMBER FOR RELATED BIBLIOGRAPHIC RECORD	Text	No	1	Yes	No
<input type="checkbox"/>	5	005	Date and time of latest transaction	Text	No	1	Yes	No
<input type="checkbox"/>	6	007	Physical description fixed field	Text	No	1	Yes	No
<input type="checkbox"/>	7	007[ER]	Physical description fixed field (Elec. Res.)	Text	No	1	Yes *101,*102,*103,*104,*105,*106,*107,*110,*111,*112,*113,*114	No
<input type="checkbox"/>	8	007[Globe]	Physical description fixed field (Globe)	Text	No	1	Yes *101,*102,*103,*104,*105,*106	No
<input type="checkbox"/>	9	007[Kit]	Physical description fixed field (Kit)	Text	No	1	Yes *101,*102	No
<input type="checkbox"/>	10	007[Map]	Physical description fixed field (Map)	Text	No	1	Yes *101,*102,*103,*104,*105,*106,*107,*108	No
<input type="checkbox"/>	11	007 [Microform]	Physical description fixed field (Microform)	Text	No	1	Yes *101,*102,*103,*104,*105,*106,*107,*110,*111,*112,*113	No
<input type="checkbox"/>	12	007 [MotionPic]	Physical description fixed field (Motion Picture)	Text	No	1	Yes *101,*102,*103,*104,*105,*106,*107,*108,*109,*110,*111,*112,*113,*114,*115,*116,*117,*118	No
<input type="checkbox"/>	13	007[Music]	Physical description fixed field (Notated Music)	Text	No	1	Yes *101,*102	No
<input type="checkbox"/>	14	007[NPG]	Physical	Text	No	1	Yes *101,*102,*103,*104,*105,*106	No

Fields on the screen

No: The sequence number on the screen. This bears no relation to the format structure.

Field: The coded field name. In the MARC21 and UniMarc formats these codes consist of 3 numbers; the field names therefor are 001 through 999.

Wording : A description of the fields.

Type: The type of field. In most cases this will be "Text", but it can also be another of the 11 types available within V-smart.

Mandatory : Denotes whether or not a particular field is mandatory when creating a record.

Max.: The maximum number of times a field may be repeated within a record.

In use: Whether or not the field is in use. With this you can disallow use of a field within removing it from the format.

Subfields: A list of subfields valid for each field. Subfields have a coded name consisting of a number or letter prefixed by a \$ sign.

Rules: For each field rules can be defined. E.g. "if field X exists then this field is mandatory". Several common formats such as MARC21 use such rule sets.

Options on the screen

New field: Use this option to add a new field. An input form will be displayed.

View subfields of field: Select a field and then this option to view the subfields. See section 159.2.1.2.

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

Copy field: Select a field and then this option to create a new field based on characteristics of the selected field.

Element/Group profiles: These profiles can be used in many areas of the system to ensure a uniform output of data. The element/group profiles are used in the SSP module, the catalogue, printing of notices etc. The idea behind these profiles is that you only need to define a profile once, which can then be used infinitely. The advantage is that you can define multiple profiles to format 'raw' data for use in various modules and parts of the system (see the next section for an overview). Examples are the definition of an ISBD profile or other complex presentations which can be used in SSP output. You can also use profiles to determine how titles are displayed in the system. This gives you full control over the display of data throughout the system. See the help for AFO 151 for a detailed explanation.

View properties of field: Select a field and then this option to view its properties. See section 159.2.1.1.

View/define rules for field instance: This option is not relevant for the holdings format.

View properties of format. This is the same as the option **View properties of format** on the overview screen of holdings formats

Jum to screen containing field: Use this option to quickly jump to a particular place. An input form will be displayed.

159.2.1.1 The properties of a field

After choosing the option to display properties of a field the system shows the following screen. In the example field 852 (location) of the MARC21/H format is chosen:

V-smart [1.0.01] - Windows Internet Explorer

Id: 1.20286/8424 User: tineke Location: PNB/BD AFO: 159

V-smart Settings Exit

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Properties of field '852' for format 'marc21/h'

No	Property	Value	Rules
GENERAL			
<input type="checkbox"/> 1	Comments and notes		
<input type="checkbox"/> 2	Data type	Text	
<input type="checkbox"/> 3	Definition	Identifies the organization holding the item or from which it is ...	
<input type="checkbox"/> 4	Examples		
Identification		852	
<input type="checkbox"/> 5	In use / active	Yes	
<input type="checkbox"/> 6	Punctuation after field		No
<input type="checkbox"/> 7	Punctuation before field		No
<input type="checkbox"/> 8	Label	Location	
<input type="checkbox"/> 9	Language dependant	No	
<input type="checkbox"/> 10	Mandatory	No	No
<input type="checkbox"/> 11	Maximum number	999	No
<input type="checkbox"/> 12	Minimum number	0	No
<input type="checkbox"/> 13	Standard field	Yes	
<input type="checkbox"/> 14	Unique value	No	No
<input type="checkbox"/> 15	Wording	Location	
FORMAT			
<input type="checkbox"/> 16	Right justified	No	
<input type="checkbox"/> 17	Default		
<input type="checkbox"/> 18	Fill character		
<input type="checkbox"/> 19	Fixed length	No	
<input type="checkbox"/> 20	Format pattern		No
<input type="checkbox"/> 21	Format test		No
<input type="checkbox"/> 22	Generated data		No
<input type="checkbox"/> 23	Maximum length		No
<input type="checkbox"/> 24	Minimum length		No
<input type="checkbox"/> 25	Modification allowed	Yes	
<input type="checkbox"/> 26	Valid values		No
RELATIONS			
<input type="checkbox"/> 27	Relation to (default)		
<input type="checkbox"/> 28	Authority generation profile(s)		
<input type="checkbox"/> 29	Order of subfields		
<input type="checkbox"/> 30	Related fields		
<input type="checkbox"/> 31	Viewer		
<input type="checkbox"/> 32	Viewer table		

159.2.1.2 Subfields and their properties

From the overview screen of a format select a field and choose the option **View subfields of field** (or double click on a field) to display the subfields defined for that particular field:

V-smart [1.0.01] - Windows Internet Explorer

Id: 1.20286/8424 User: tineke Location: PNB/BD AFO: 159

Settings **Exit**

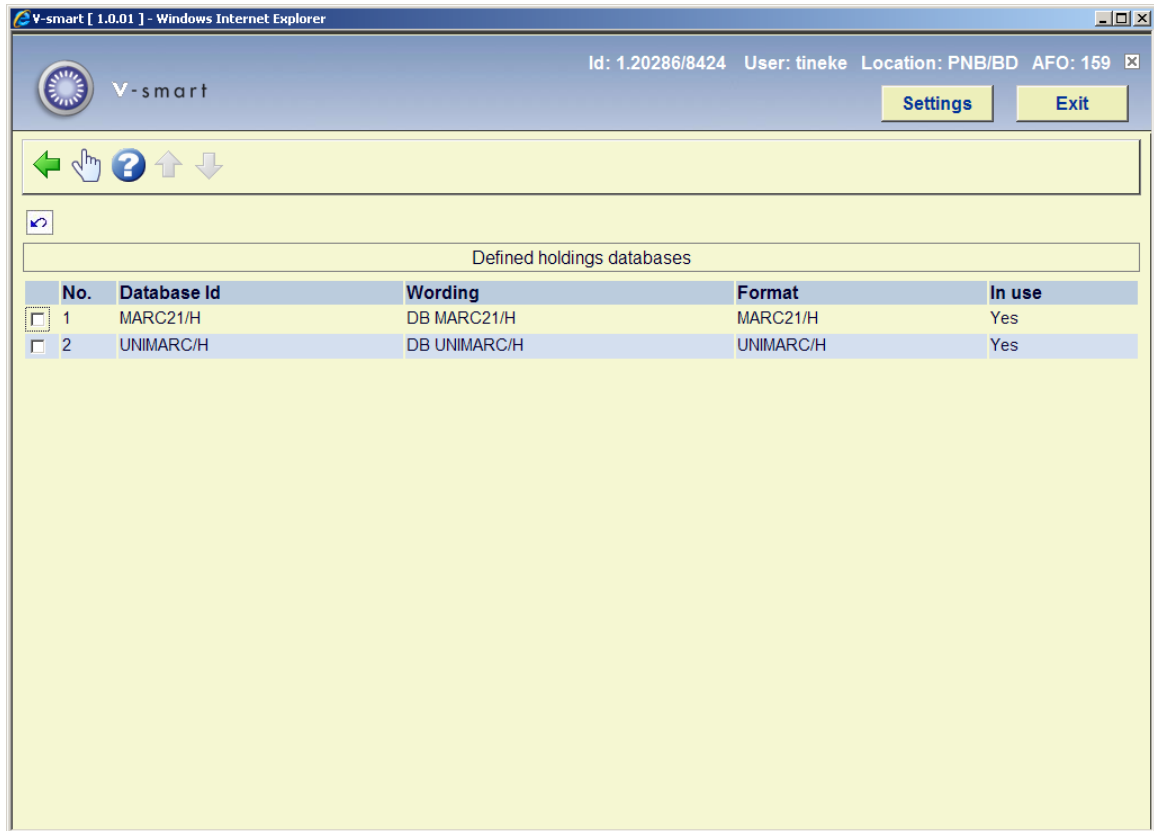
Subfields of field '852' of format 'marc21/h'

No	Subfield	Wording	Type	Mand.	Max.	In use	
<input type="checkbox"/>	1	\$2	Source of classification or shelving scheme	Text	No	1	Yes
<input type="checkbox"/>	2	\$3	Materials specified	Text	No	1	Yes
<input type="checkbox"/>	3	\$6	Linkage	Text	No	1	Yes
<input type="checkbox"/>	4	\$8	Field link and sequence number	Text	No	1	Yes
<input type="checkbox"/>	5	\$a	Location	Text	No	1	Yes
<input type="checkbox"/>	6	\$b	Sublocation or collection	Text	No	999	Yes
<input type="checkbox"/>	7	\$c	Shelving location	Text	No	999	Yes
<input type="checkbox"/>	8	\$e	Address	Text	No	999	Yes
<input type="checkbox"/>	9	\$f	Coded location qualifier	Text	No	999	Yes
<input type="checkbox"/>	10	\$g	Non-coded location qualifier	Text	No	999	Yes
<input type="checkbox"/>	11	\$h	Classification part	Text	No	1	Yes
<input type="checkbox"/>	12	\$i	Item part	Text	No	999	Yes
<input type="checkbox"/>	13	\$j	Shelving control number	Text	No	1	Yes
<input type="checkbox"/>	14	\$k	Call number prefix	Text	No	1	Yes
<input type="checkbox"/>	15	\$l	Shelving form of title	Text	No	1	Yes
<input type="checkbox"/>	16	\$m	Call number suffix	Text	No	1	Yes
<input type="checkbox"/>	17	\$n	Country code	Text	No	1	Yes
<input type="checkbox"/>	18	\$p	Piece designation	Text	No	1	Yes
<input type="checkbox"/>	19	\$q	Piece physical condition	Text	No	1	Yes
<input type="checkbox"/>	20	\$s	Copyright article-fee code	Text	No	999	Yes
<input type="checkbox"/>	21	\$t	Copy number	Text	No	1	Yes
<input type="checkbox"/>	22	\$x	Nonpublic note	Text	No	999	Yes
<input type="checkbox"/>	23	\$z	Public note	Text	No	999	Yes
<input type="checkbox"/>	24	*1	Shelving scheme	Indicator	No	999	Yes
<input type="checkbox"/>	25	*2	Shelving order	Indicator	No	999	Yes

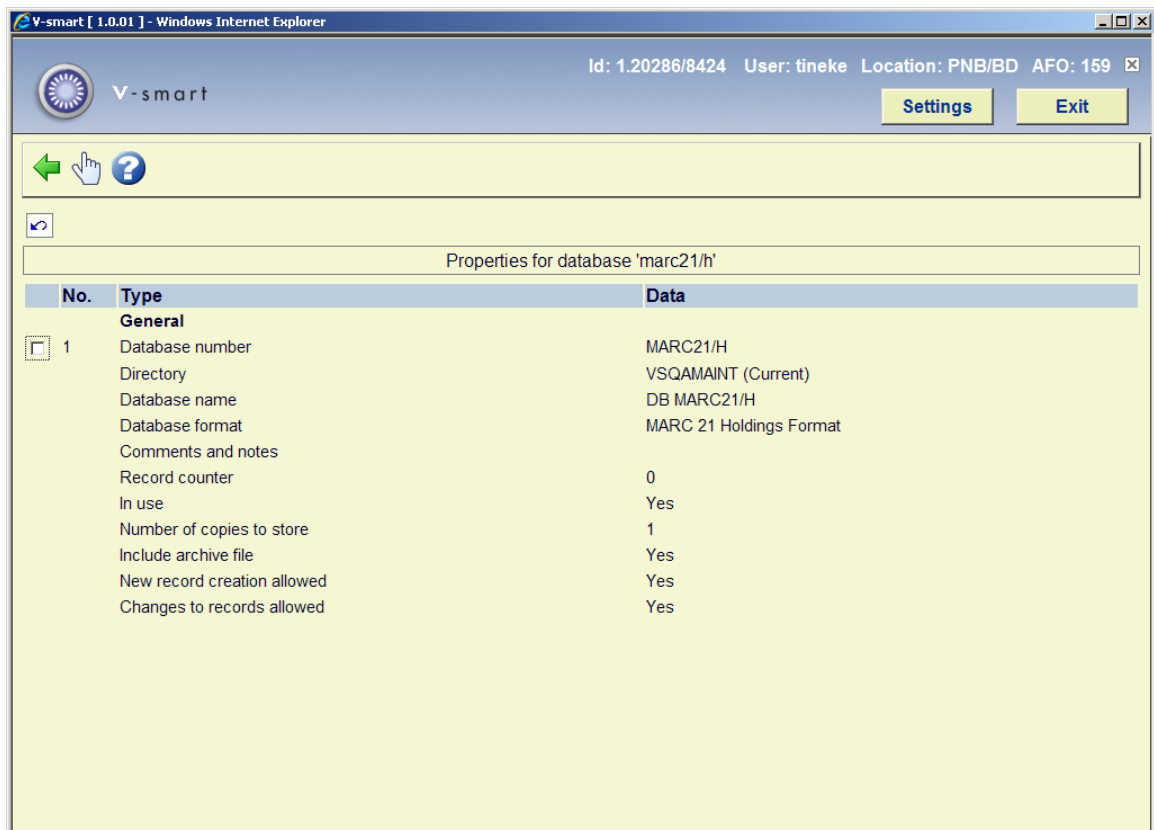
By double clicking on a subfield you can look at the properties of that particular subfield. The properties of a subfield are similar to those of a field. Changing them is done in the same way as for fields. See section 159.2.1 for a description of the column headings on the screen displayed above.

159.3 Databases

When choosing the second option from the AFO 159 main menu – Databases – a list is shown of databases already defined:



Doubleclick on a database to view its properties:



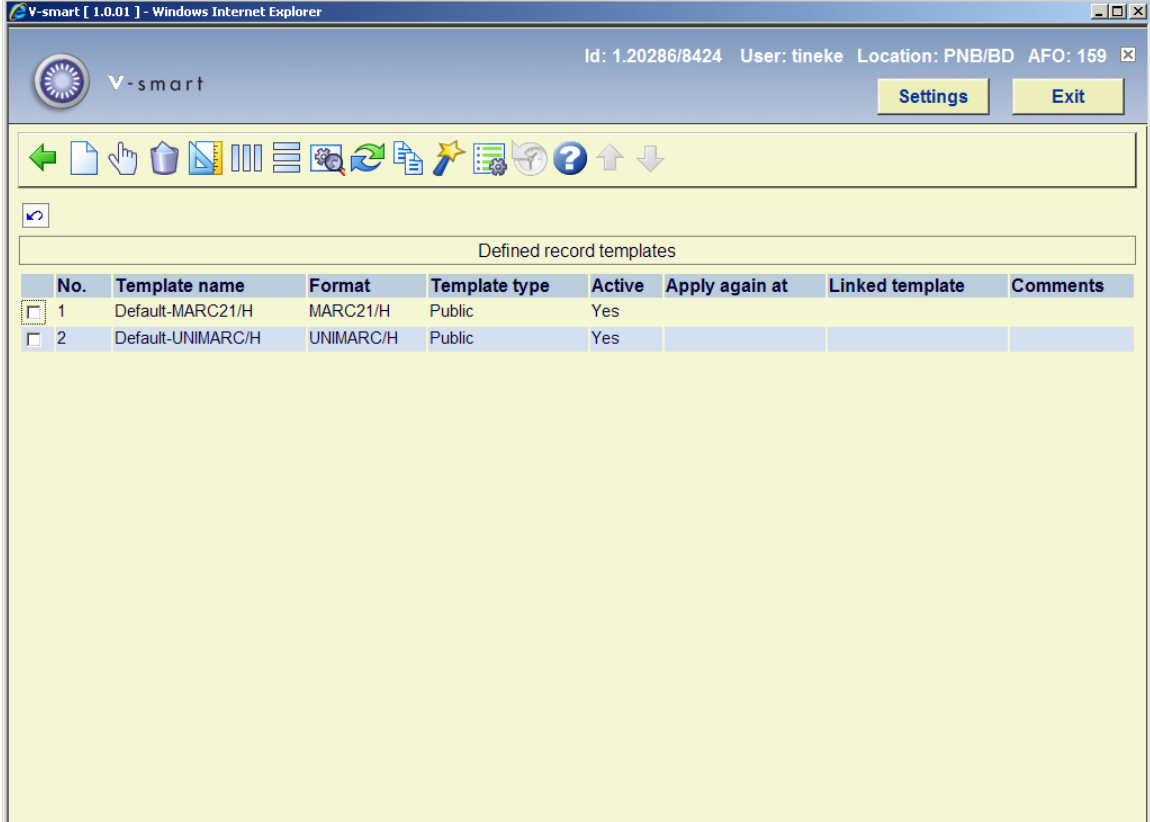
The various properties of a V-smart holdings database in AFO 159:

Property	Description
Number	The database identification number. Number 1 is always a system database. When creating a new database a number is assigned automatically. It is not recommended to change this number (although it is possible on this screen).
Name	A short, descriptive name for the database.
Directory	The directory (called <i>namespace</i> within the Caché database server) where the database must be stored. U can choose a different directory/namespace from the current one, but that must be a correct V-smart namespace.
Format	The holdings format for the database.
Comments and notes	Free text.
Record counter	This is not applicable for holdings formats.
In use	As long as this property has not been set, the database cannot be used. Later you can disable an existing database in this way, without having to physically remove it.
Number of copies to store	You can retain previous versions of edited holdings records. The number of version you wish to retain is specified here.
Include archive file	When a holdings record is deleted and this parameter is set to Yes, then the last version of that record will be stored in the archive file.
New record creation allowed	Whether or not creation of new records is allowed.
Changes to records allowed	Whether or not editing of records is allowed.

159.4 Templates

These templates appear when you select one of the shelfmark sets from the **Holdings statements for shelfmark sets** screen in AFO 111 and choose the option **Shelfmark set (MARC)** to update holdings information about the shelfmark set. This information includes copy number, physical format, shelving information, retention policy and notes about the shelfmark set. The options are the same as for bibliographic MARC editing but the editing applies to the holdings format (MARC21 or UNIMARC).

When choosing the third option from the AFO 159 main menu – Templates – a list is shown of templates already defined:



The screenshot shows the V-smart web application interface. At the top, there is a header bar with the V-smart logo, user information (Id: 1.20286/8424, User: tineke, Location: PNB/BD, AFO: 159), and buttons for Settings and Exit. Below the header is a toolbar with various icons for navigation and editing. The main content area displays a table titled "Defined record templates".

No.	Template name	Format	Template type	Active	Apply again at	Linked template	Comments
<input type="checkbox"/> 1	Default-MARC21/H	MARC21/H	Public	Yes			
<input type="checkbox"/> 2	Default-UNIMARC/H	UNIMARC/H	Public	Yes			

From the list of templates you can edit the properties of each template. To do so select a template and then click on one of the icons described below.

Click on **View classes** to edit the presentation style for each element of the template. These elements are: normal text, field labels, subfield labels and four types of data. What you can change is: the display colour and whether or not the display should be in bold and/or italics.

Click on **View columns** to edit the presentation of the various columns. The columns are: General, Fields, Indicators, Subfields and Data. When you double click on one of them you can amend the following properties:

- Whether you want to display the code or the label (that is the full name, wording).
- What the edit mode is: Insert, No change allowed, Overwrite.
- The maximum width of the column (in number of characters).
- The characters that are allowed in the column. When nothing is entered here, all characters are valid.
- Substitution character.

Click on **View fields/subfields** to change the field labels for the languages Dutch, English and French. Note that you only change the wording as used in the template, not the wording within the format. You can do this for both fields and subfields.

Click on **General information template** to set certain parameters that could also be set on creation of the template. These are: whether the template is private or public, comments, whether the template is available in the cataloguing module, when the template must be re-applied.

Click on **Replace selected template** to replace the contents of the selected template with the contents of another template (which can be selected from a dropdown list).

The icon **Copy template** is similar to **Replace selected template**, the difference being that you copy the contents of the selected template to a new template.

Click on **Parameters** to set how the fields and subfields must be displayed in the dropdown list that is presented when adding a new (sub)field. The choice is between 'first text then code' and 'first code, then text'.

Click on **Check the templates** to check no conflicts with the defined format exist.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
2.0	August 2010	Record counter not applicable for holdings format part of 2.0.06 updates	