Guide to the OLE Describe and Manage Module

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Introduction

This guide provides information about using Describe and Manage functions. The Describe and Manage Module strives to achieve two goals:

1. To describe the library's materials so staff and the public can find them and access their contents.
2. To manage the library's physical and electronic inventory so that it is accurately represented in the system.

Note

To learn more about the Describe Module, see the *Describe Overview* on the OLE Documentation Portal.

This guide is organized to follow the layout of the Describe tab.

- The first section provides explanations of cataloging functions: the workbench, bound-withs, import single bibliographic records, record editors, transfer and browse the catalog.
- The second section presents information related to cataloging administration: maintenance documents (documents that control database tables) associated with cataloging.

These sections are divided into subsections covering individual functions. For each function, the applicable subsection presents a breadcrumb trail showing how to access the function and information on the layout and fields on the related screen(s). As appropriate, some subsections include business rules and routing information for e-docs and/or special instructions for performing activities.

Note

In order to work efficiently in the system's Deliver screens, you need to understand the basics of the user interface. For information and instructions on logging on and off, navigating, understanding the components of screens, and performing basic operations in the screens, see OLE Basic Functionality and Key Concepts.

This guide as well as guides to other OLE modules are available for download from the OLE Documentation Portal.

Tip

Bookmark any page within OLE. This will allow you to easily navigate back to an interface or e-doc in one click, just log in.

Chapter 1. Create/Edit Titles, Holdings, or Items

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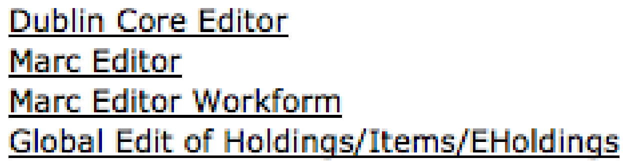
> 

On the Describe menu, the Create/Edit Title, Holdings or Items submenu provides access for users to create and edit bibliographic records, holdings and items.

Dublin Core Editor

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The Dublin Core Editor described in this document represents a utility (that is a part of OLE) that will allow users to update and created bibliographic records. The records being updated will have previously been imported and indexed by OLE (OLE-DocStore).

Note

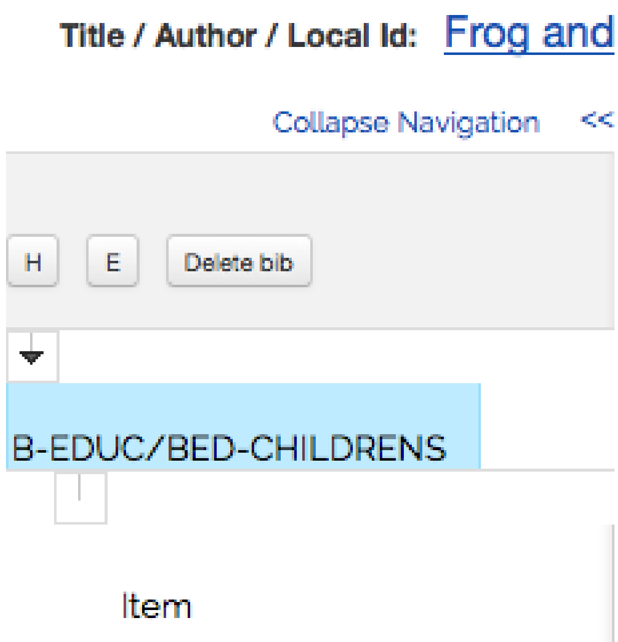
For more information about importing batch records, see the Batch Processes section of the *OLE Guide to System Administration Functions*.

Tip

You will notice the left panel navigation. This navigation panel will allow you to navigate to other editors (bibliographic,OLE Instance: holding or item, or E-Instance) as well as add (click the 

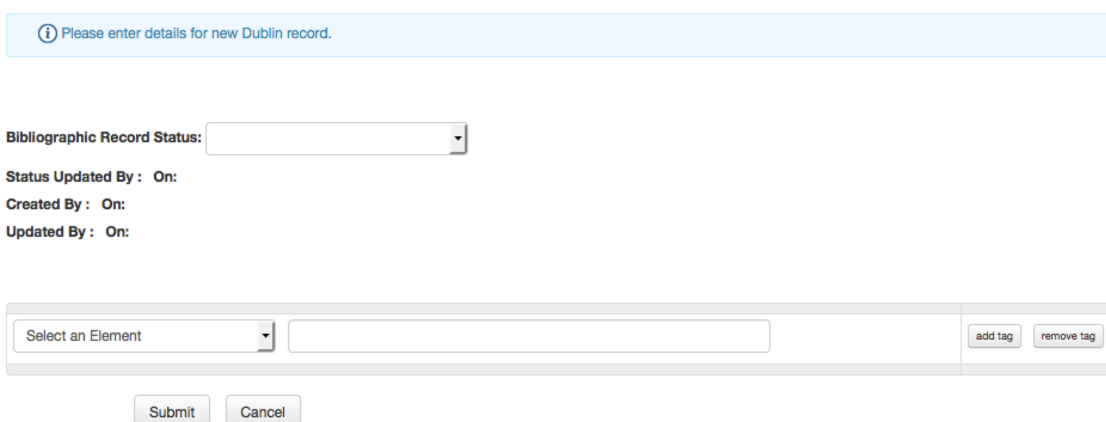
) and delete (click the 

) records.



Process Overview

Each element is repeatable; there is an **add tag** button under each initial box to add another. There is no limit to the number of occurrences for an individual element. If a drop-down list is provided for an element, then the drop-down list for that element should be repeated as well when an element is repeated. When the Dublin Core element name differs from the recommended label for the element in a public view, the label is given in parentheses after the element name.



To add a Dublin Core Record to the OLE DocStore:

1. Select **Title** from the element drop down Enter the name by which the resource is formally known.
2. Click 

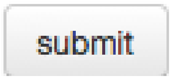
3. Select **Creator** from the drop down of the new tag line. Enter the entity primarily responsible for making the content of the resource

4. Click 

5. Continue to add tags and entering information into the fields until the Dublin Core Record is complete.

   ### Note

   Dublin core tags and descriptions are available to Kuali users through Google Docs. (You will need to be logged into KIS to access this document.)

6. Click 

   OLE will refresh the screen and redisplay the record.

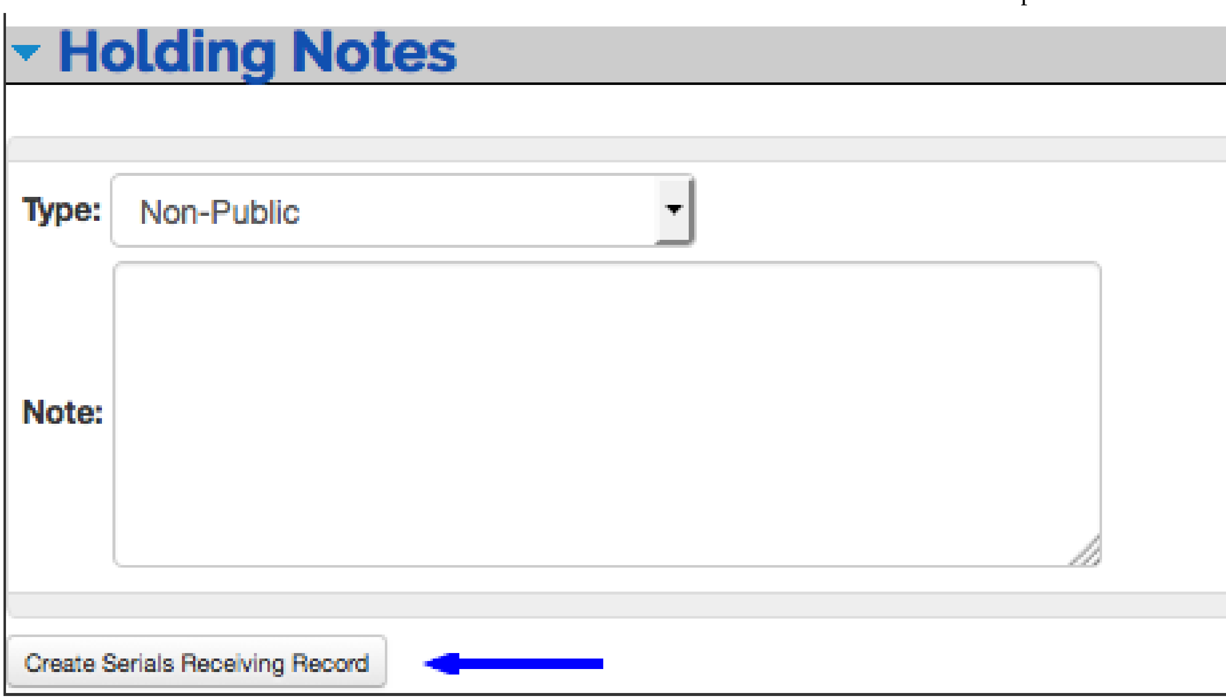
   ### Note

   Upon Submit, you will receive the message "Failed to save record". This is a bug in OLE 1.6. If you search for the record from the search workbench, you will see that the record has been created. This bug is scheduled to be fixed. See OLE-6325.

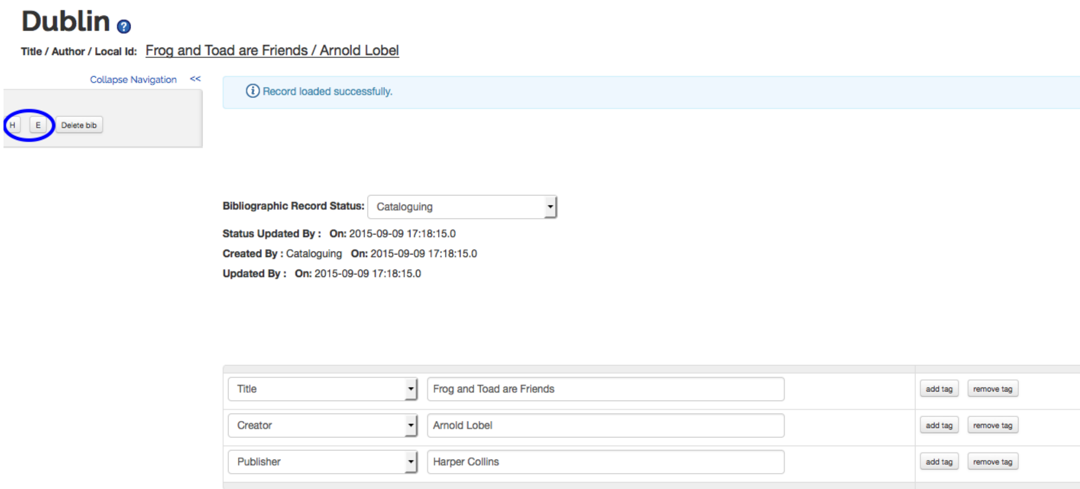
7. If the record is new, OLE will create placeholder Holdings and Item. Click **Holdings** to modify the Holdings record. Click **Item** to modify the Item record.

   ### Note

   For more information about the OLE Instance Holdings and Item Editor, see Instance Editor

8. Click the top level 

to add additional OLE Instance (Holdings or Item) or E-Instance (E-Holdings) records.



Business Rules

- A bibliographic record may have zero, one, or many item records attached.

Note

When displayed in the left pane, only a maximum of 5000 items per holding will be displayed.

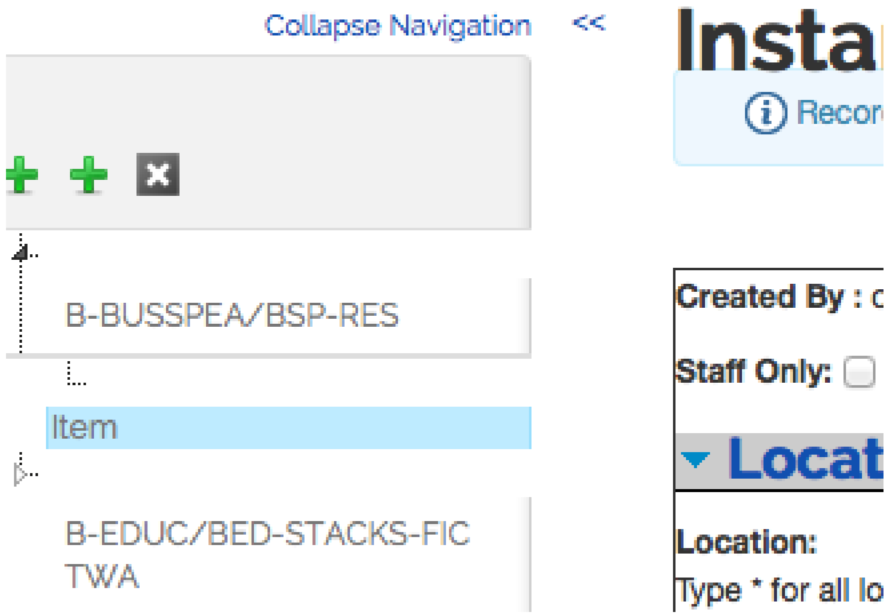
MARC Editor

Describe > Create/Edit Titles, Holdings or Items > Marc Editor > Bib

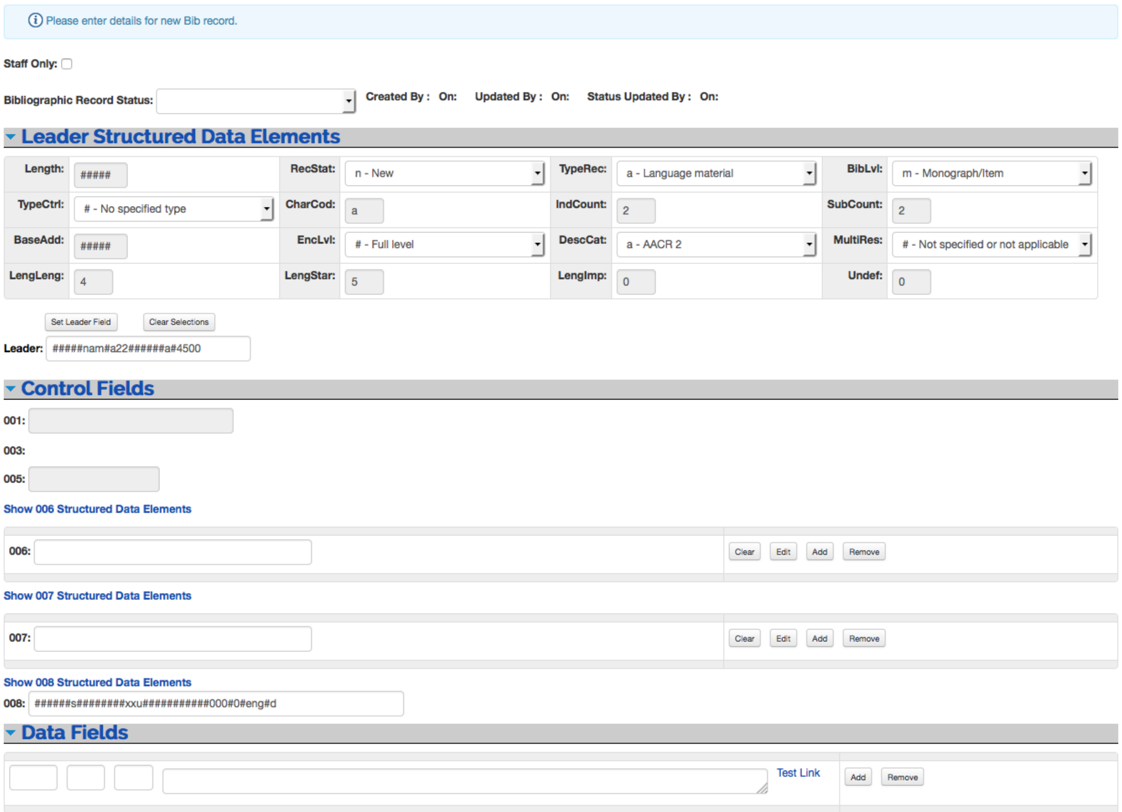
The Bibliographic (Bib) Editor may be accessed through other menu items listed below the **Describe** submenu as well as through the **edit** or **create new** buttons in transactional line items of Requisitions, Purchase Orders, Receiving, etc. or by clicking on the record title in the **Search Workbench**.

Tip

While viewing a record in the Bib Editor, notice the left panel navigation. This navigation panel will allow you to add (click the) OLE Instance (Holding and Item) and E-Instance records or delete (click the) Bibliographic Records. While hovering over these icons, a pop-up note will inform the user which icon to click to **Add Instance**, **Add EInstance**, or **Delete Bib**.



Process Overview



The following data fields are required, at a minimum:

- one Leader field
- one 008 fixed field

- one 245

Tips

1. A **Staff Only** checkbox (found at the top of the record) is available to mark a record so that it does not display in the discovery layer.

2. An optional tool is the **Bibliographic Record Status** (found at the top of the record).

   a. Bibliographic record status and the date the status was updated can be used as filters when developing a Batch Process Profile (under the Admin tab) for Batch Export. This can be helpful for sending a holdings update file to a bibliographic vendor (such as OCLC or SkyRiver)

   b. Though locally configurable, OLE's predefined statuses are None, Cataloguing, and Catalogued.

   c. New statuses can be developed through the Maintenance tab, under Cataloging Admin. Statuses are not required and can be locally configured.

   d. If a status is not chosen, the field will remain blank.

3. Following each Data Field is the text hyperlink **Test Link**. This provides for testing URIs that might be entered in any Data Field (such as the 856). More information on this function can be found in the document [Testing URIs in the Bibliographic Editor].

4. Future enhancements include the ability to create templates to prepopulate fields.

Leader Field

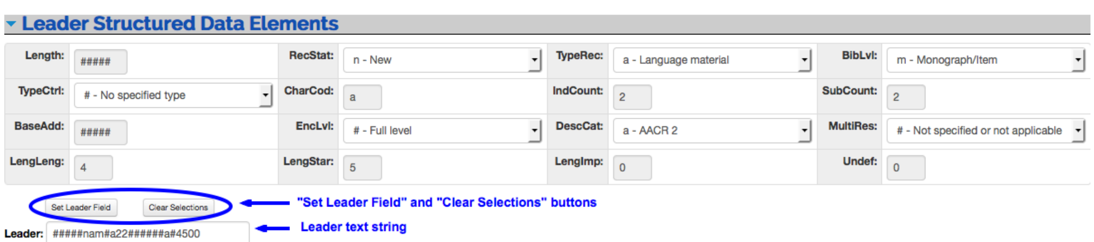
1. If it is not edited, the leader will be populated with default codes.

   A blank code is represented by the pound sign (#).

2. Select a valid element from the field's drop down lists and click **Set Leader Field**.

3. Click **Clear Selections** to remove the selected elements and return to the default settings.

4. When set, the Leader field will appear as a text string below the data elements:



5. The leader can be edited both in the text string box and in the structured data elements display.

6. Click the down arrow to the left of the **Leader Structured Data Elements** heading to collapse the display:

008 Fixed Fields (and also the 006 and 007 fixed fields)

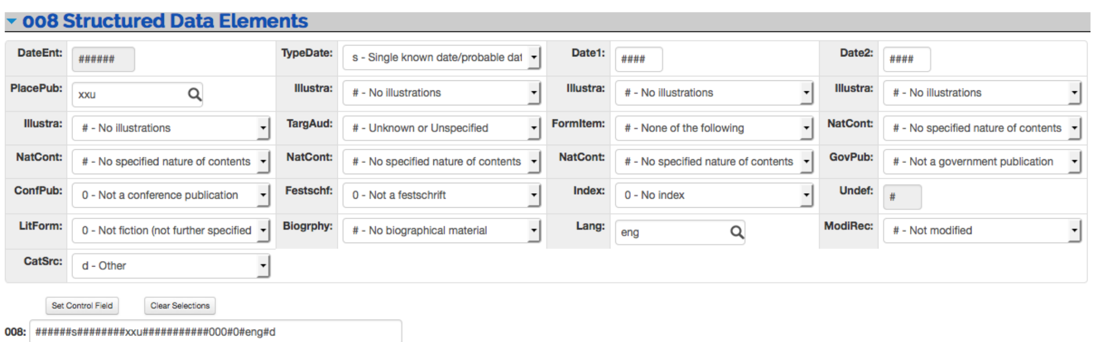
1. If it is not edited, the 008 will be populated with default codes. The 006 and 007 can be populated with defaults once the code for the 00 position is chosen (since default codes are dependent upon the selection of the code for the 00 position) and then the **Set Control Field** button is clicked.

2. When creating a new record, the 008 displays as a text string with default codes. By clicking on the text **Show 008 Structured Data Elements**, the 008 will display all the data elements with drop down menus and search boxes to select valid codes.

3. Select a valid element for the field's drop down lists or search boxes and click **Set Control Field**.

4. Click **Clear Selections** to remove the selected elements and return to the default settings.

5. When set, the 008 will appear in a single line below the data elements:



6. Click the down arrow to collapse the 008 Structured Data Elements display.

Note

- Character positions 00-05 (DataEnt) in the 008 field will first appear as ###### when a new record is being created and will update with the Date Entered on File once the bibliographic record has been submitted.

- Considering all Control Fields: tags for Control fields can be any 001-008 value

  - The 001 and 005 cannot be edited in OLE

- For version 1.6, there is no validation for the Control Fields. If data in the text string includes coding that is not found in the drop down menus, the record can still be saved and will not reject invalid data.

245 field (and other data fields)

1. **Data Fields** (also known as variable fields) must have a three-digit numeric tag and values in both indicator positions (blanks are allowed). Variable fields 01X through 8XX must start with a delimiter and a subfield code (a letter or number) and include some text in the body of the field. If no subfield code is entered, a subfield code (|a) will be added to the edited field when the bibliographic record is submitted.

2. **Indicators** may be blank. A blank can be entered by either

   - typing a pound (#)
   - pressing the spacebar
   - pressing the tab key
   - leaving the indicator blank (not inserting a value)

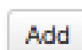
   Once the “ Submit ” button has been pressed, any blank indicators will display as a pound (#) sign.

3. The **delimiter** character used in OLE is the pipe (|).

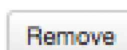
4. Except for the initial subfield code, subfield codes should be preceded and followed by a space (e.g. <space>|b<space>).

   a. If a space is not supplied, OLE will add one.

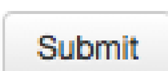
   b. If an initial subfield code is not entered, OLE will assume a |a and will enter it once the “ Submit ” button is clicked.

5. Enter the data field information. Click 

to add additional data fields. A data field left blank will be removed once the **Submit** button has been clicked.

6. To remove a data field, click the 

button.

7. Click 

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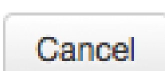
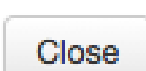
   OLE will save and redisplay the record.

8. Click 

to cancel the edits and return to your original screen. A browser window will open stating:

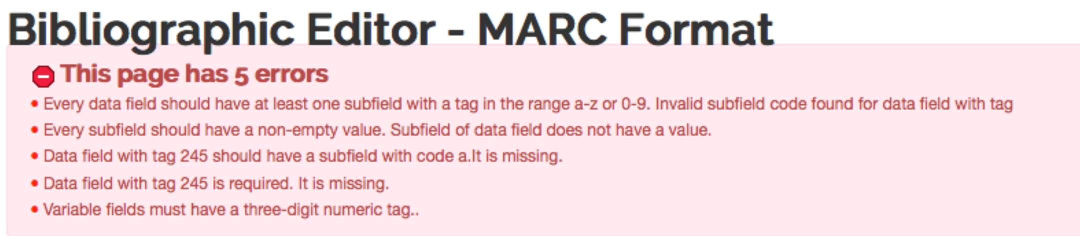
   This page is asking you to confirm that you want to leave - data you have entered may not be saved.

   Clicking **Leave Page** will take you to the search screen. Clicking **Stay on Page** will keep you at the Bib Editor screen but does not remove edits.

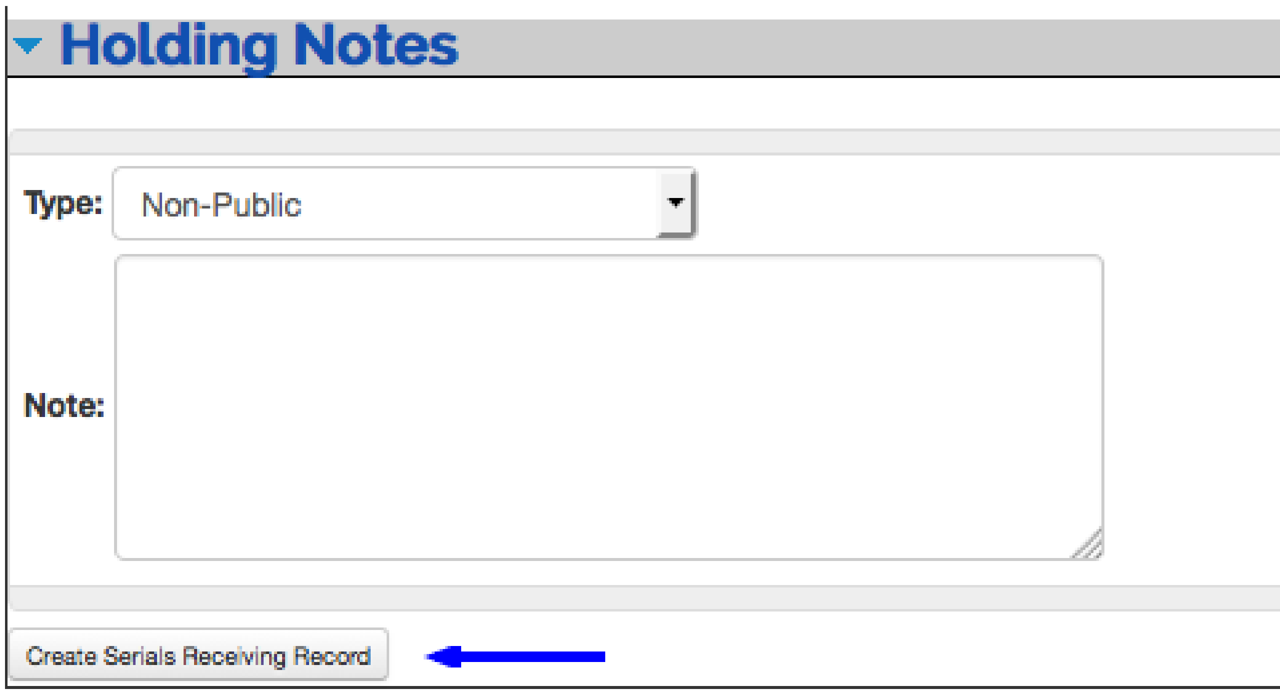
9. Click 

to cancel the edits and close the window.

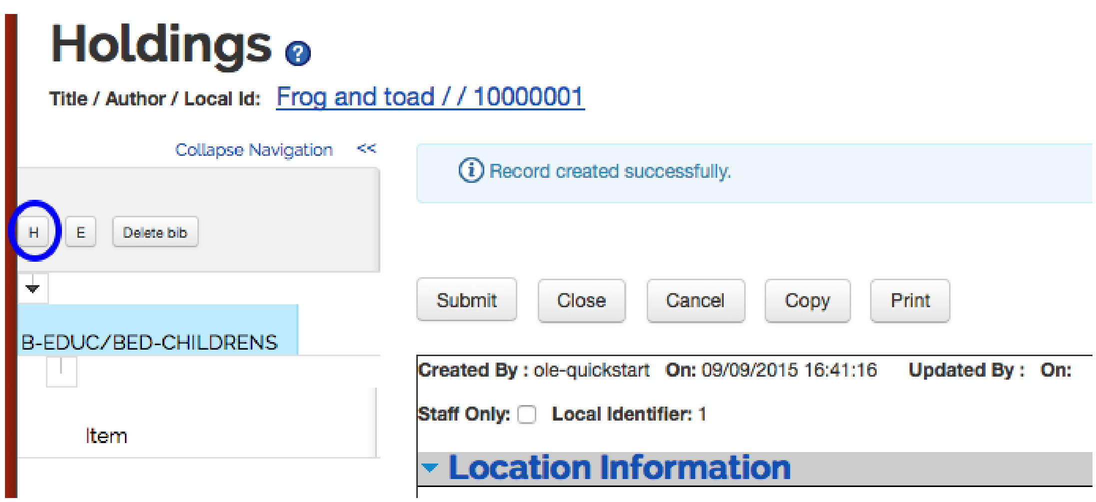
10.If you submit an invalid record, OLE will display an error message.



11.On the left navigation panel, click the first top level plus sign



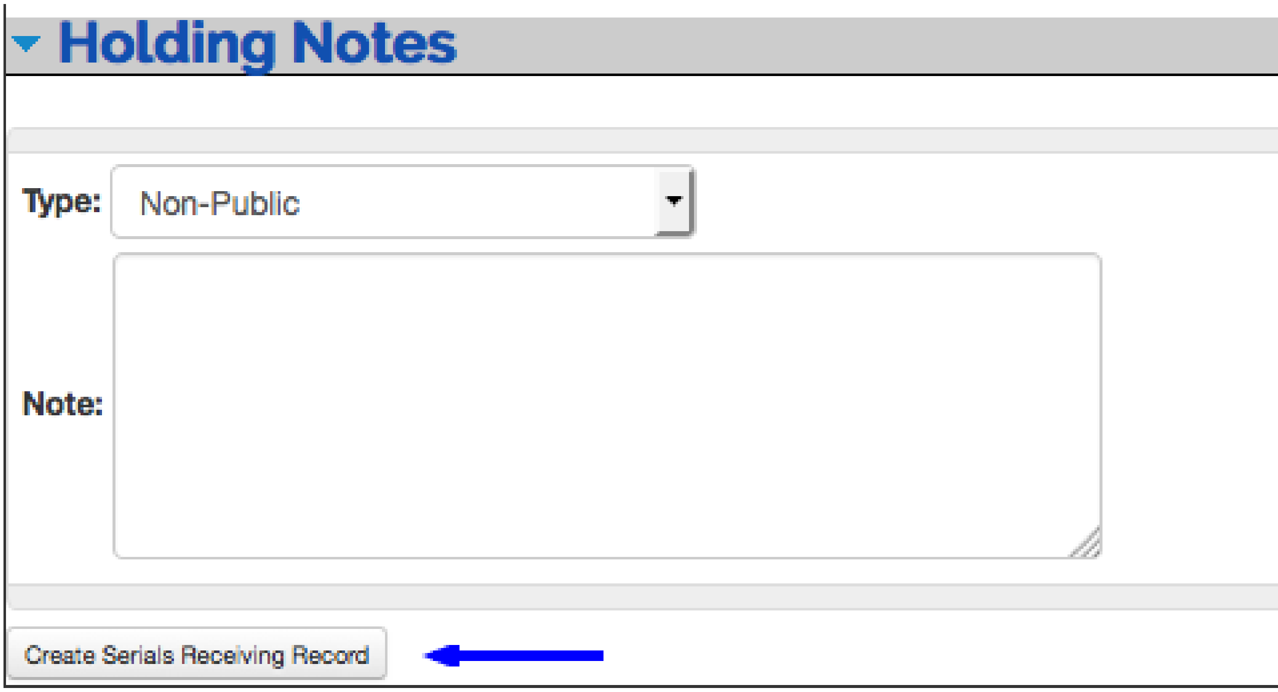
to add an OLE Holdings records.



Note

For more information about the OLE Holdings and Item Editor, see Instance Editor

Click the second top level plus sign

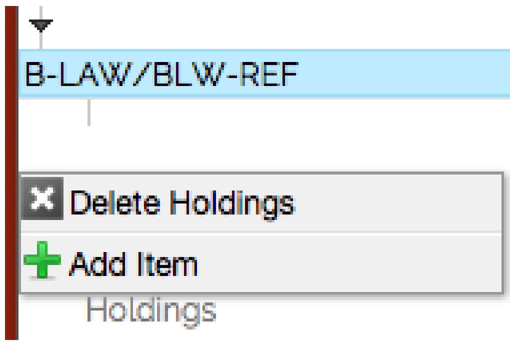


to add an OLE E-Holdings records.

Note

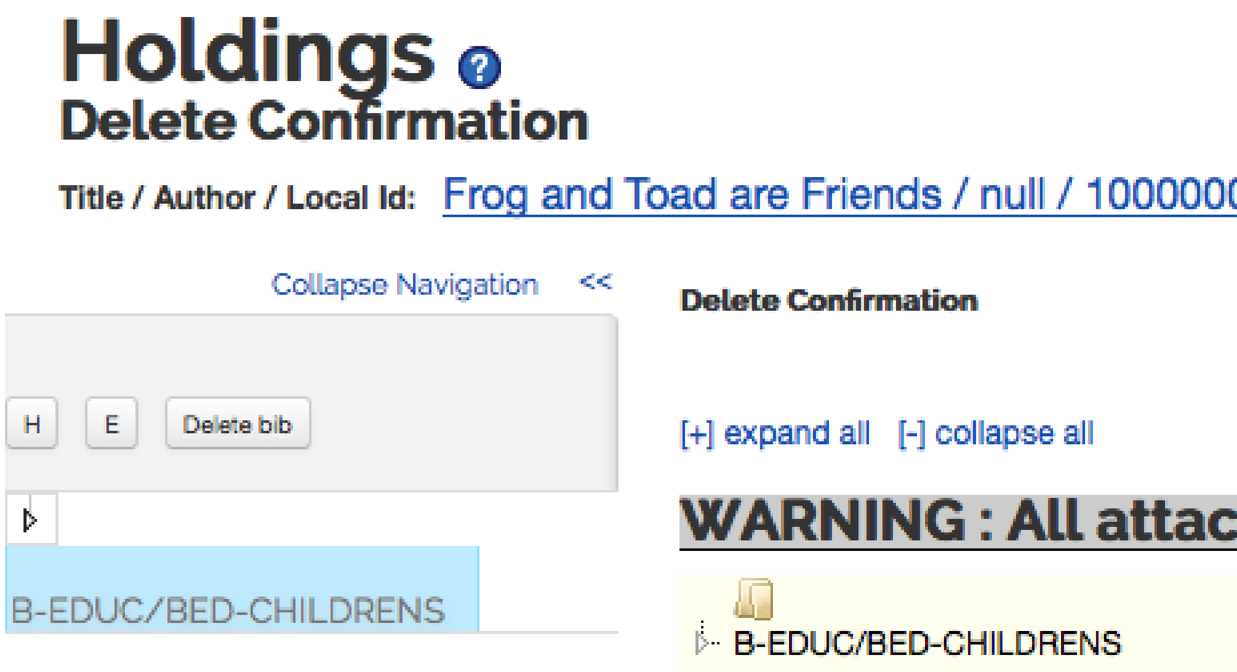
For more information about the OLE E-Holding Editor, see E-Holding Editor

Right click on the call number or the word "Holdings" to delete a holdings record or add an item record.



Tip

On the Delete confirmation screen, be sure that the record you want to delete is highlighted in the left panel. Otherwise you may delete the wrong record. If the record is not displayed, scroll in the navigation panel.



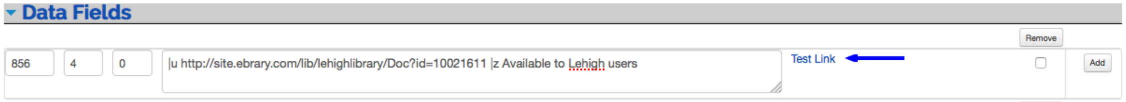
Click the top level to delete the current bibliographic record.

Testing URIs in the Bibliographic Editor

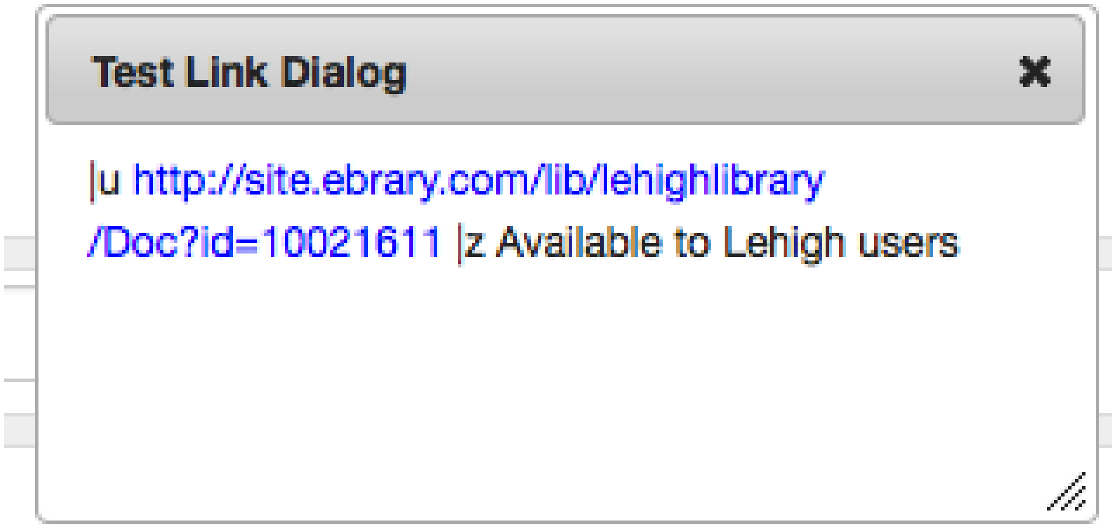
OLE provides hyperlinks for Uniform Resource Identifiers (URIs) that are contained in MARC data fields of the Bibliographic Editor. This gives the user an efficient means to test the validity of a URI, directly from the MARC record.

OLE Bibliographic Editor - Testing URIs

Any URI that is entered in any of the MARC fields of the Data tab in the Bibliographic Editor can be hyperlinked by OLE. To test a link the user must click on the words **Test Link**, located either to the right or beneath the MARC field that contains the URI. The location of **Test Link** will depend on the size of the browser window.



When **Test Link** is clicked, a **Test Link Dialog** window will open. The URI or URIs that are included in the MARC field will be hyperlinked in this new open window.



If more than one URI is in the MARC field they must have at least one space between them in order for OLE to distinguish them as two separate URIs and create separate links for them. Subfield coding does not interfere with the interpretation of the URI as a web address. In the example above, two URIs were entered into two subfield 0s in a MARC 100 field. When the Test Link Dialog window opened, each URI remained distinct and led to its own web page.

All URIs must begin with the protocol directive of http:// or https:// in order for OLE to recognize the text string as a web address. If OLE has not recognized a given URI as a web address, the text will not be hyperlinked in the Test Link Dialog window.

Once the user is finished testing the link or links, the Test Link Dialog box can be closed by clicking on the X in the top right corner of that window.

Note

Submit does not have to be clicked in order for this function to work.

Business Rules

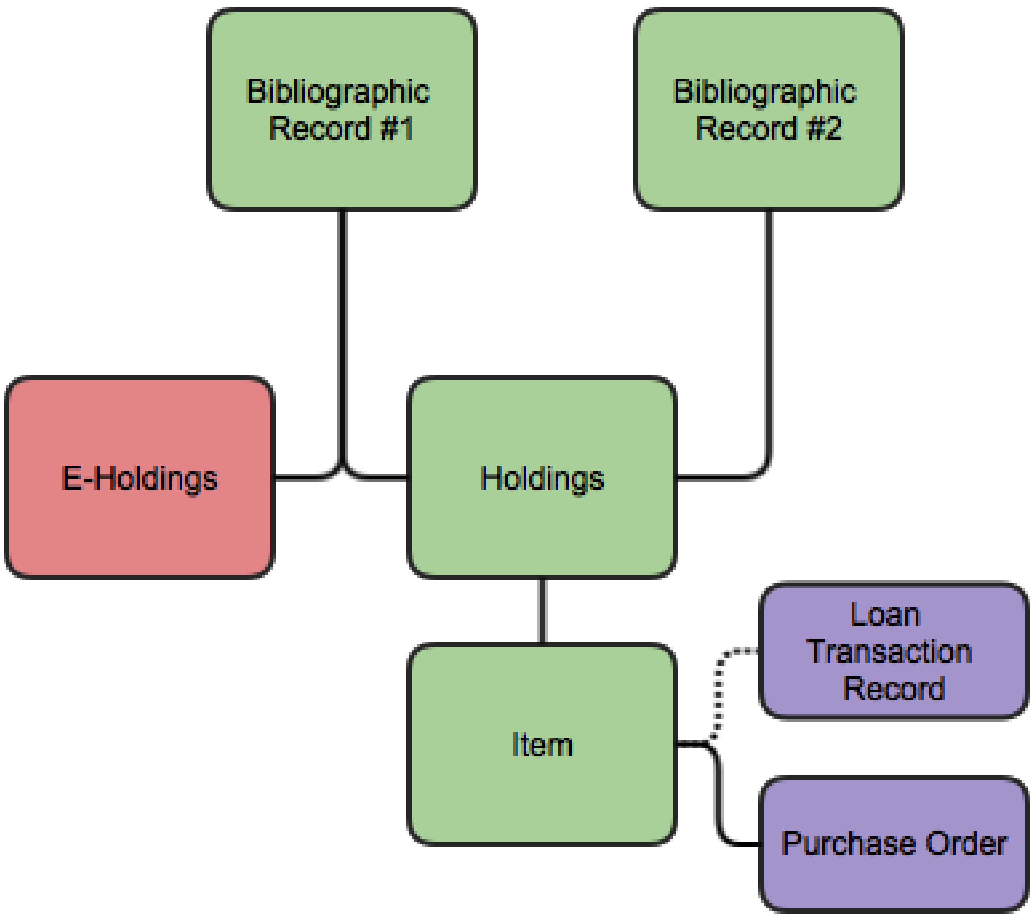
- A bibliographic record may have zero, one, or many item records attached.
- When displayed in the left pane, only a maximum of 5000 items per holding will be displayed.

Instance Editor: Holdings and Item Records

The OLE Instance document is a collective term for the holdings and item records associated with a bibliographic record. Holdings and item records may be created automatically when bibliographic records are imported individually or in batch, but they can also be created, edited, or deleted manually. A bibliographic record may have zero, one, or many holdings records associated with and subordinate to it. A holdings record may have zero, one, or many item records associated with and subordinate to it. In the case of a "bound-with," a holdings record can be attached to more than one bibliographic record. In OLE, there is another kind of Instance in addition to the OLE Instance, and that is the E-Instance. The E-

Instance is intended to support a workflow for electronic resources (see [E-Holding Editor documentation]() for more details). While the use of the E-Instance is not required -- a library may choose to describe its holdings of an electronic resource using an OLE Instance -- it is recommended that institutions utilize the E-Instance for electronic resources.

In this example below, Bibliographic Record #1 has one E-Instance and one Instance Holding attached to it. This might occur if a library chose to attach its holdings for electronic and print versions of a work to the same record. The example also shows that Bibliographic Record #1 and Bibliographic Record #2 share an Instance Holding because of a bound-with situation. A Loan Transaction Record is shown temporarily linked to the item record for the print copy because the item has been checked out to a borrower. A purchase order for the item is also linked to that item record.

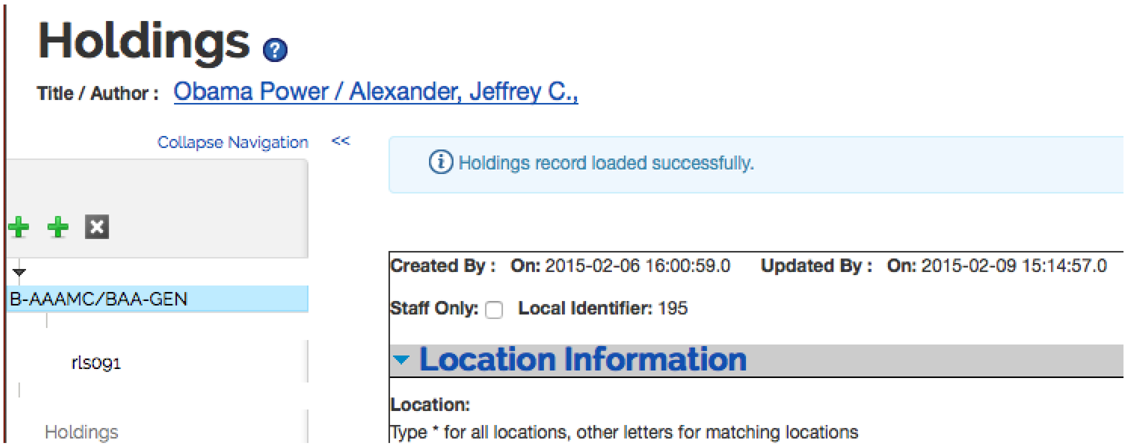


A holdings record contains basic information about a library's holdings of a particular work, such as its location, call number, and, for serials and other multi-part items, a summary statement of the extent of the library's holdings. An item record contains more detailed information about a particular item. For tangible materials, an item record typically describes something that could be or is intended to circulate as a unit, and contains the barcode number that is recorded on the physical piece.

Because holdings and item records do not exist independently within OLE but are always linked to bibliographic records, the Instance Editor is usually not invoked directly but is most often invoked from the display of a particular bibliographic record. However, it is possible to search holdings and item records separately from bibliographic records, and thus invoke the Instance Editor that way. The Instance Editor is not directly accessible from the OLE main menu.

Document Layout

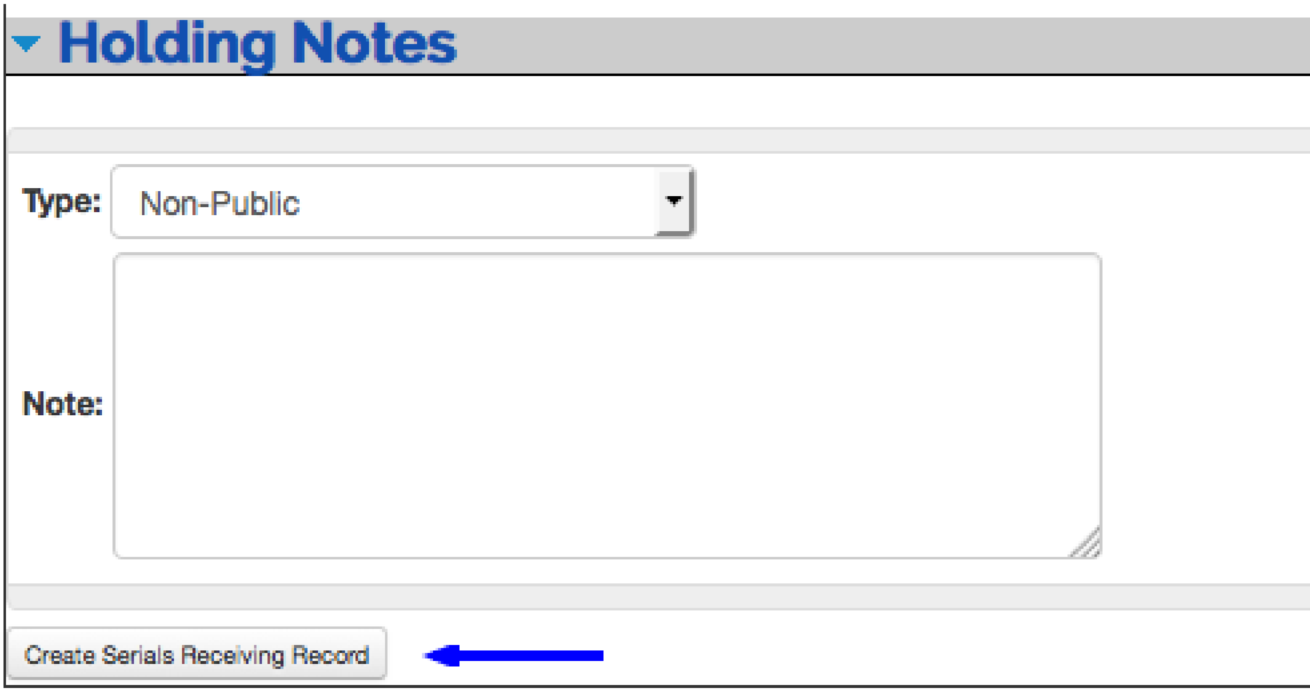
Navigation among the holdings and item records associated with a bibliographic record is done by means of the links provided in the left pane. For a given bibliographic record, this menu will appear on the Bibliographic Editor screen, the Instance Editor (Holdings) screen, and the Instance Editor (Item) screen. The complete list of holdings and items associated with the bibliographic record is always available from the left pane regardless of which screen you are viewing, although the list of items linked to a particular holdings record may be "hidden" under the holdings record and not displayed. To display any hidden items associated with a holdings record, click on the small hollow triangle next to the holdings. If there is no such triangle next to the holdings, that means that the holdings record does not have any item records linked to it. If the items linked to a holdings are displayed, you can hide them by clicking on the small filled-in triangle next to the holdings.



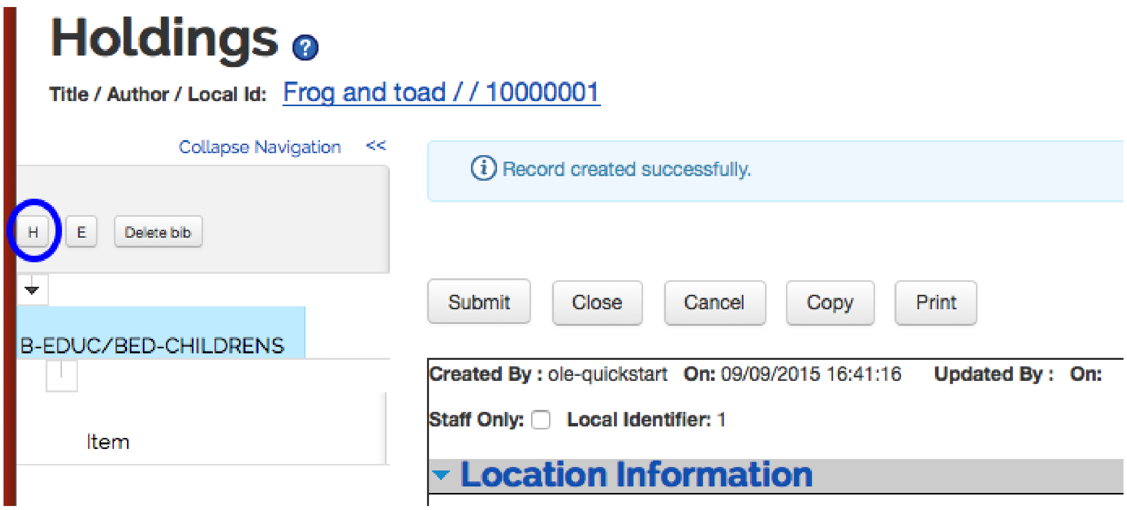
In the left pane, a holdings record is identified by the location, call number, and copy number data elements in the holdings record. Not all of these data elements may be present. If none of them are present, the holdings record will be identified by the word "Holdings" in the left pane. If you are creating a new holdings record, it will be identified in the left pane by the word "Holdings" until you add location, call number, or copy number information to it and save it by clicking on the "Submit" button.

An item record is also shown in the left pane, indented slightly from the holdings record to which it is linked and is preceded in the display by a double slash. An item record is identified by the enumeration, chronology, copy number, and barcode number data elements of the item. Not all of these data elements may be present. If none of these data elements are present, an item record will be identified by the word "Item" in the left pane.

On the left navigation panel, click the first top level plus sign

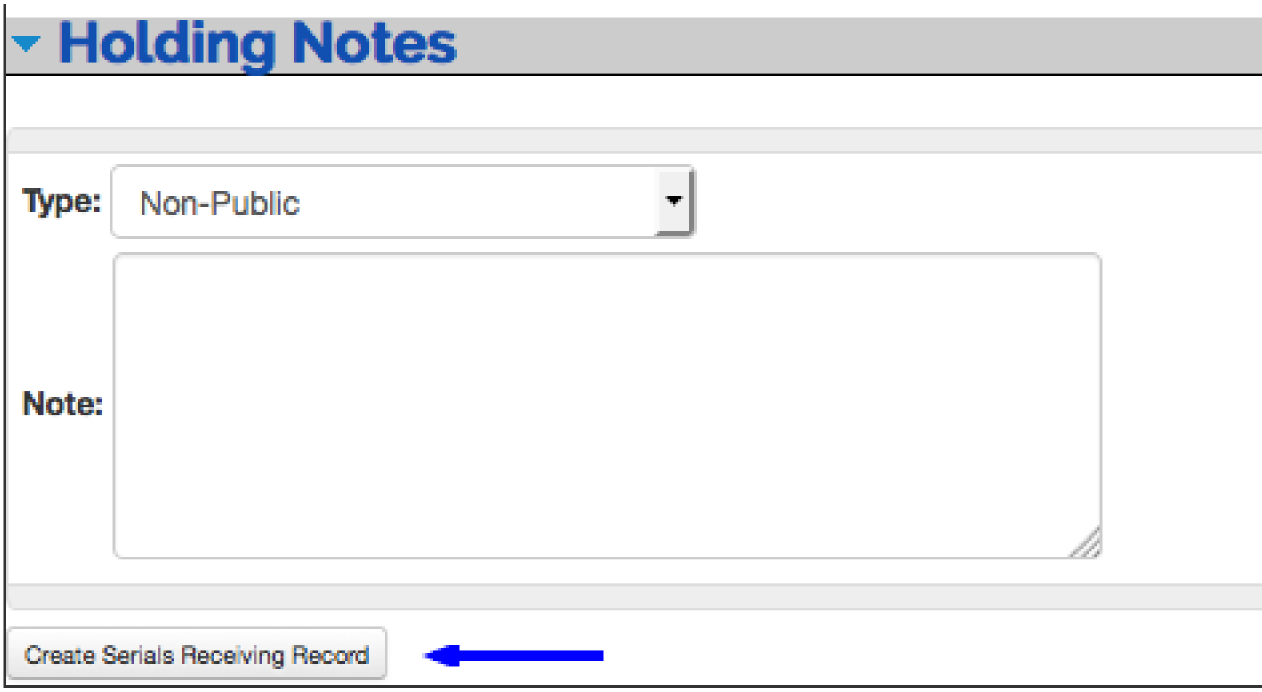


to add an OLE Instance Holding records.



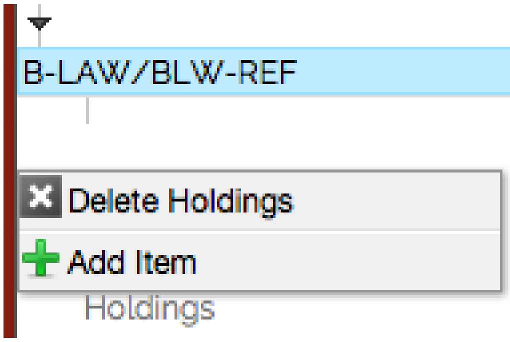
Note

To add an E-Instance E-Holding Record, click the second top level plus sign

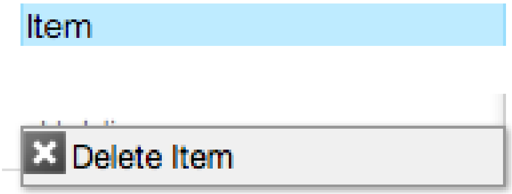


For more information about the OLE E-Holdings Editor, see E-Holding Editor

Right click on the call number to delete a holdings record or add an item record.



Right click on the item record to delete it. You will be asked to confirm that you actually want to delete the item before the command is actually executed. If you do not wish to delete the item, click on "Cancel".



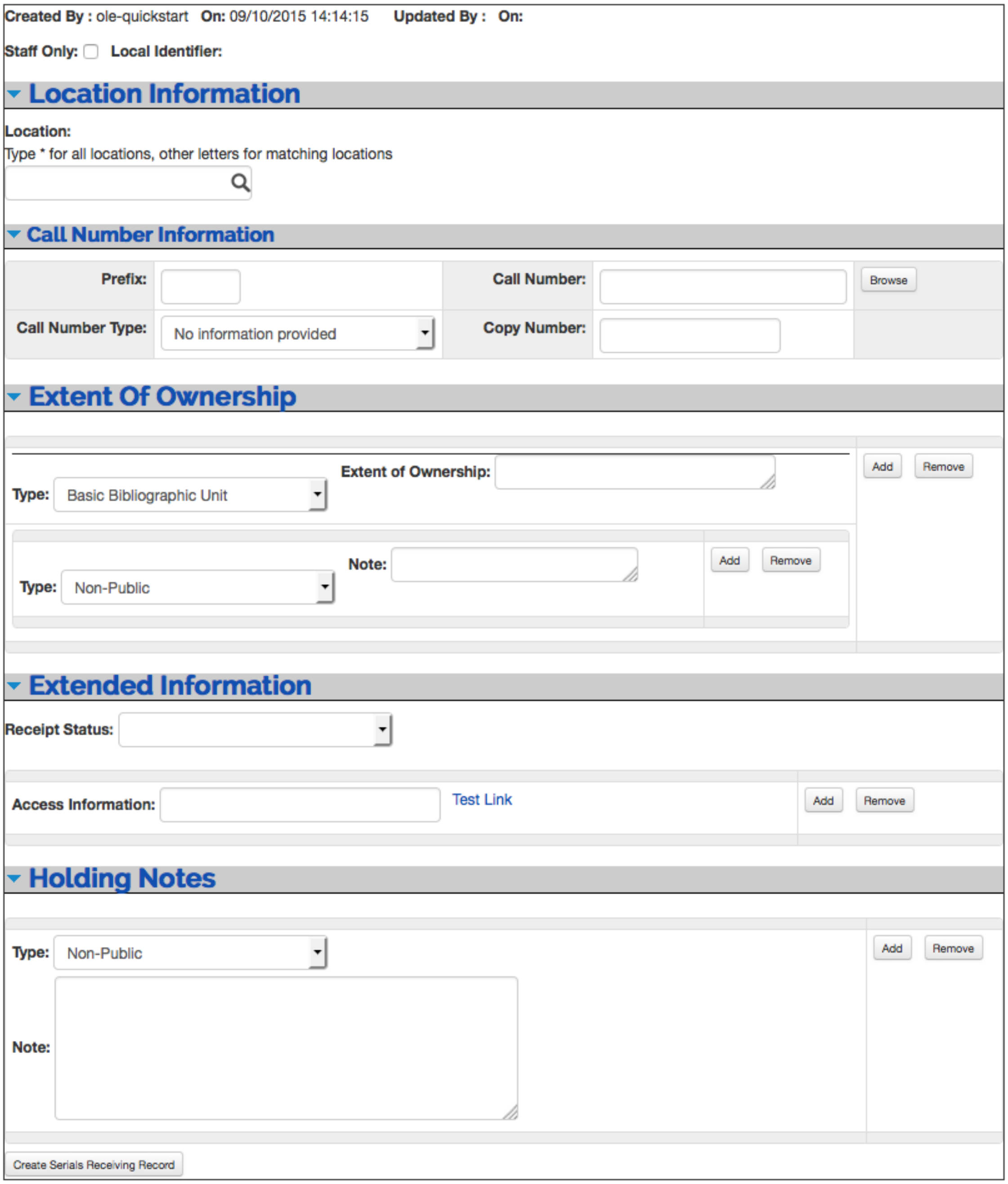
Tip

On the Delete confirmation screen, be sure that the record you want to delete is highlighted in the left panel. Otherwise you may delete the wrong record. If the record is not displayed, scroll in the navigation panel.

Click the top level  to delete the current bibliographic record. You will be asked to confirm that you actually want to delete the record before you may proceed. If you do not wish to delete the record, click on “Cancel”; you will then be returned to the OLE Search Workbench instead of the record you have been working on.

You can hide the entire left pane from the screen display by clicking on the "Collapse Navigation" command at the top of the pane. To restore the left pane, click on the double right arrows (>>).

OLE Holdings



The top of the holdings record shows the ID of the user who created it and the date it was created. If the record has been subsequently updated, the ID of the last user to update it and the date of last update will also be shown.

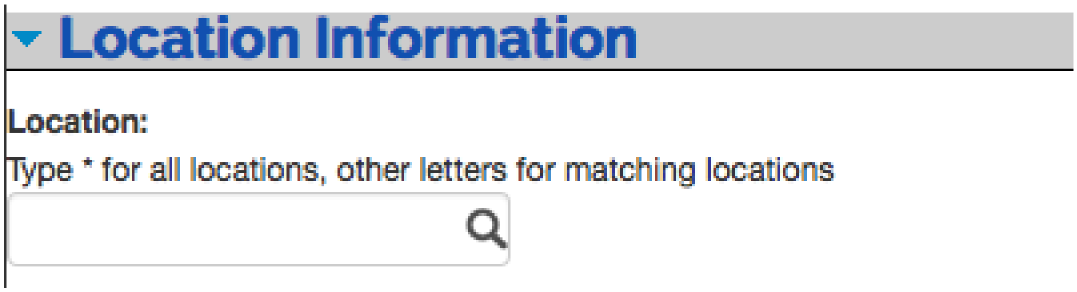
A check box allows the holdings record to be flagged as Staff Only. The purpose of the flag is to make it possible to hide that particular holdings record from end users in the library's discovery layer (OPAC).

The Local Identifier is a system-generated number assigned by OLE to the holdings record. It is stored within the OLE system.

The OLE Instance Holding record includes the following tabs: **Location Information**, **Call Number Information**, **Extent of Ownership**, **Extended Information**, **Holding Notes**, and **Serial Receiving**.

Location Information tab

Location Information shows where the items described by the holdings record are located. OLE allows locations to be defined as part of a hierarchy of up to five levels (for example, Institution/Campus/Branch Library/Collection/Shelving Location).

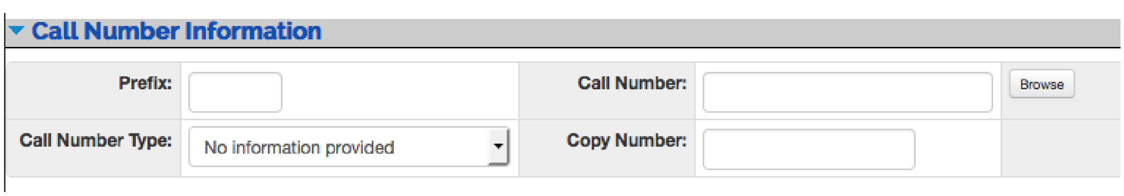


Location Information tab definition

Title	Description
Location	Select the location from the drop down list: Begin typing and a list of options will appear. Enter “*” (asterisk) to display the complete list.

Call Number Information tab

The Call Number Information tab contains the call number, classification, and shelving scheme for the holding.



Call Number Information tab definition

Title	Description
Prefix	Term that precedes a call number.
Shelving Order	A system-generated version of the call number that OLE uses for call number sorting. Because of the complexity of call numbers, in rare cases it may not be generated correctly to provide for proper sorting, so catalogers can edit it in order to change the sort order.
Copy Number	Library-assigned to distinguish each copy of the same title. A library may wish to create a separate holdings record for each copy. OLE also permits copies to be identified at the item level rather than the holdings level, as long as the location and call numbers are the same (for example, two copies of the same monograph shelved together in the same place in the same branch library).

Call Number	The full call number without subfields. Click  to open **Call Number Browse** **Note** For more information on the interface, see [Call Number Browse](#)
Call Number Type	Scheme used to shelve a bibliographic item in the collections of the reporting organization. Select the Call Number Type from the drop down.

Extent of Ownership tab

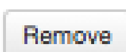
The Extent of Ownership tab contains the summary holdings and notes (public or non-public). You could describe the summary holdings of a particular copy (where "copy" means "a run of volumes with the same base call number in the same shelving location").

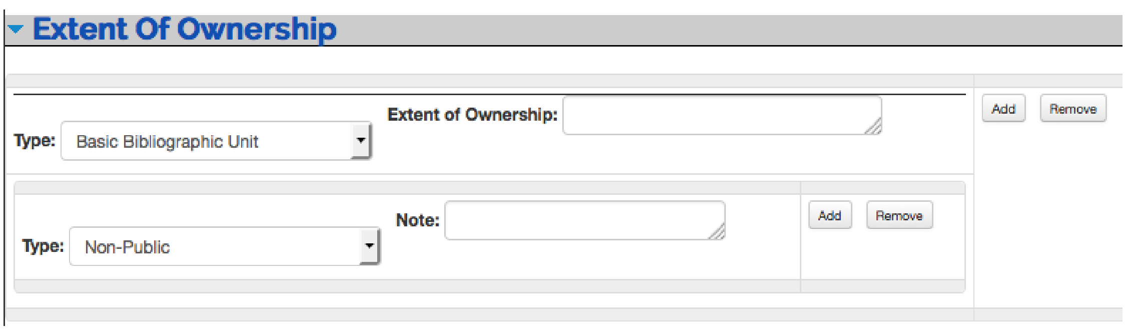
In whatever order the Extent of Ownership statements are added is the order in which they will be displayed later on.

Note

In OLE 1.6, the order cannot be modified once entered. A fix is expected for 2.0. See [OLE-6294](#).

Click  to add additional Extent of Ownership lines or notes.

Click  to remove excess Extent of Ownership lines or notes.



Extent of Ownership tab definition

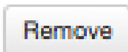
Title	Description
Type	Select the type for extent of ownership from the drop down list. Three types are provided for: Base Bibliographic Unit, Supplementary Material, and Indexes. These correspond to fields 866, 867, and 868, respectively, in the MARC Holdings format.
Extent of Ownership	Record here in free text form a summary statement of the library's holdings for a particular copy and a particular type (Base Bibliographic Unit, Supplementary Material, or Indexes). An Extent of Ownership statement is not normally used for single-part items.
Type	Select public or nonpublic type from the drop down list to determine whether the note will be viewable from the discovery layer.
Note	A free-text field to record information about a particular copy and type of holding.

Extended Information tab

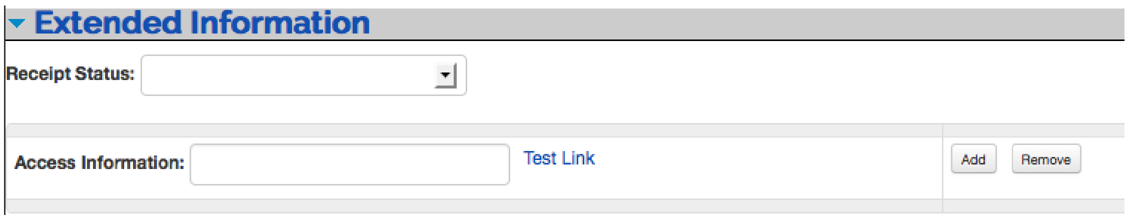
The Extended Information tab contains receipt status and access information.

Click 

to add additional Access Information URLs.

Click 

to remove excess Access Information URLs.



Extended Information tab definition

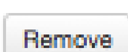
Title	Description
Receipt Status	Select the Receipt Status from the drop down list. The values correspond to those used in the MARC Holdings format, field 008/06, and include the following: Unknown, Other receipt or acquisition status, Received and complete or ceased, On order, Currently received, Not currently received.
Access Information	The purpose of this field is to record a URL for a particular copy of an electronic item. In a consortial environment, different institutions or campuses may be given different URLs from a vendor for accessing the same item. Click **Test Link** to test the link. See Testing URIs in the Instance Editor.

Holding Notes tab

The Holding Notes tab contains public and nonpublic notes that apply to the holding record.

Click 

to add additional notes.

Click 

to remove excess notes.

Holding Notes tab definition

Title	Description
Type	Select Public or Nonpublic from the drop down list to determine whether the note will be viewable from the discovery layer.
Note	A free-text field to record information about the holdings for this particular copy.

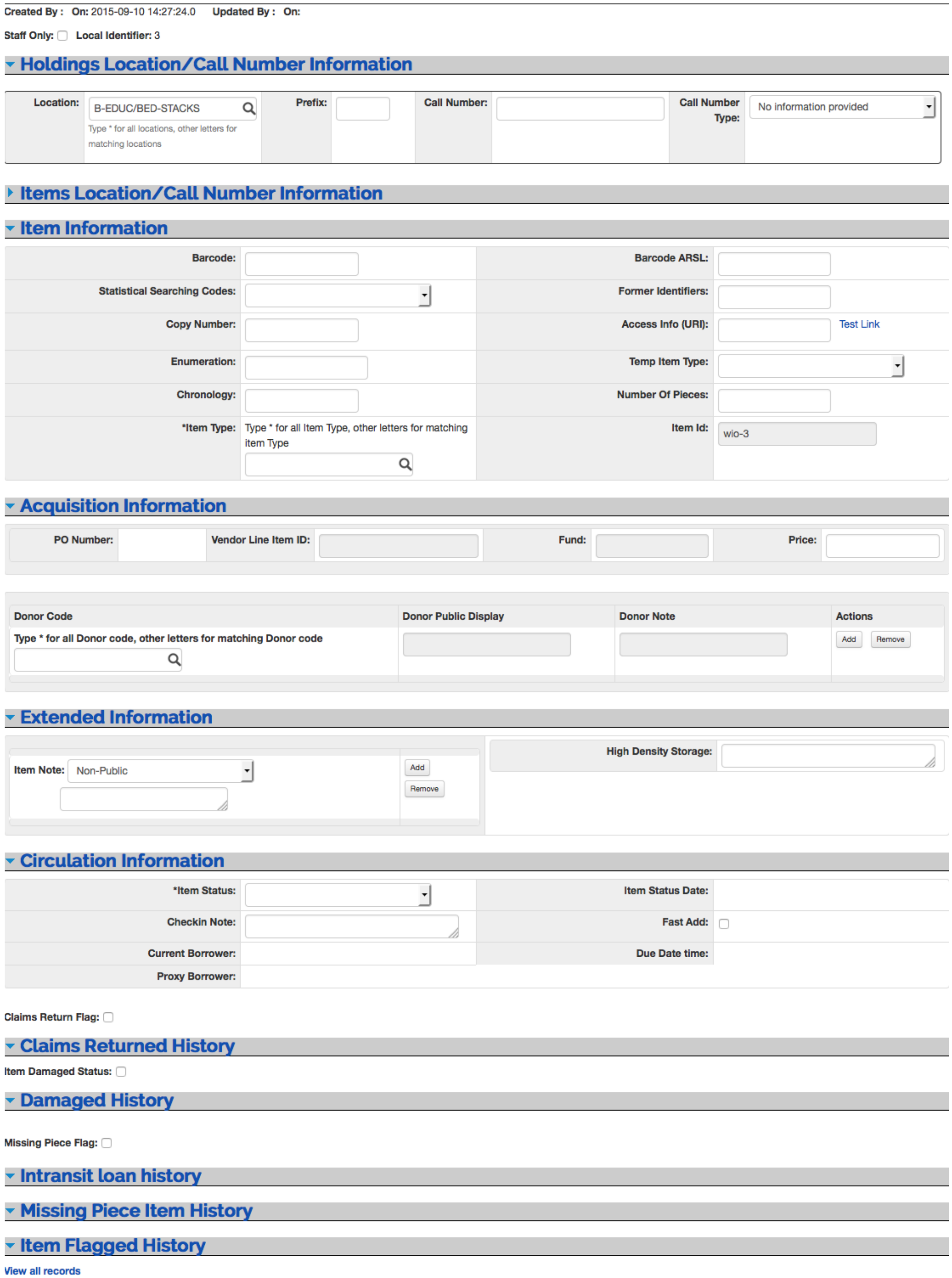
Serial Receiving

Click **Create Serials Receiving Record** located at the bottom ot the Holdings Editor to open the **Serials Receiving Transaction** Record.

Note

For more information about the Serials Receiving Transaction record, see Serials Receiving Transaction in the *Guide to the OLE Select and Acquire Module*.

OLE Items


Created By : On: 2015-09-10 14:27:24.0 Updated By : On:
Staff Only: Local Identifier: 3
Holdings Location/Call Number Information
Location: B-EDUC/BED-STACKS
Type * for all locations, other letters for matching locations
Prefix:
Call Number:
Call Number Type: No information provided
Items Location/Call Number Information
Item Information
Barcode:
Barcode ARSL:
Statistical Searching Codes:
Former Identifiers:
Copy Number:
Access Info (URI): Test Link
Enumeration:
Temp Item Type:
Chronology:
Number Of Pieces:
*Item Type: Type * for all Item Type, other letters for matching item Type
Item Id: wio-3
Acquisition Information
PO Number:
Vendor Line Item ID:
Fund:
Price:
Donor Code
Donor Public Display
Donor Note
Actions
Type * for all Donor code, other letters for matching Donor code
Add
Remove
Extended Information
Item Note: Non-Public
Add
Remove
High Density Storage:
Circulation Information
*Item Status:
Item Status Date:
Checkin Note:
Fast Add:
Current Borrower:
Due Date time:
Proxy Borrower:
Claims Return Flag:
Claims Returned History
Item Damaged Status:
Damaged History
Missing Piece Flag:
Intransit loan history
Missing Piece Item History
Item Flagged History
View all records

The top of the item record shows the ID of the user who created it and the date it was created. If the record has been subsequently updated, the ID of the last user to update it and the date of last update will also be shown.

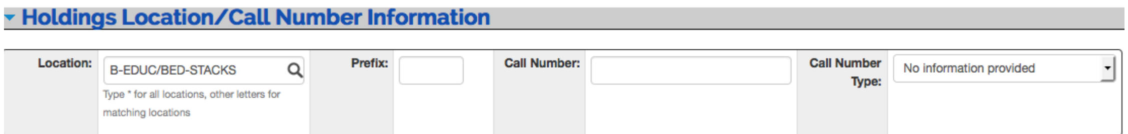
A check box allows the item record to be flagged as Staff Only. The purpose of the flag is to make it possible to hide that particular item record from end users in the library's discovery layer (OPAC).

The Local Identifier is the number of the item record within the OLE system.

The OLE Instance Item record includes unique tabs with some information inherited from the Holding record: **Holding Location/Call Number Information**, **Item Location/Call Number Information**, **Item Information**, **Acquisition Information**, **Circulation Information**, and **Extended Information**.

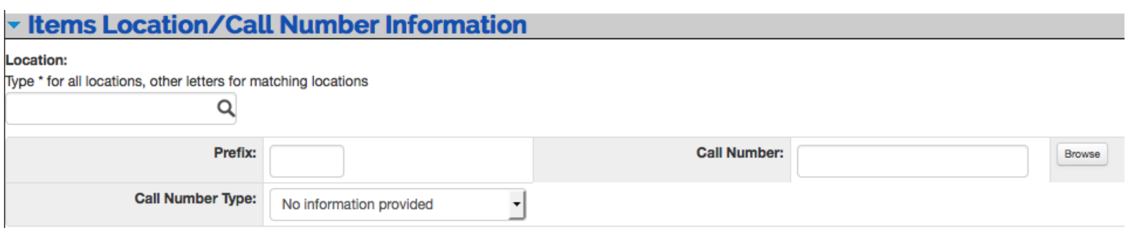
Holdings Location/Call Number Information tab

The Holdings Location/Call Number Information tab contains call number information inherited from the Holdings record. It is not editable from the item record.

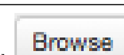


Items Location/Call Number Information tab

The Item's Location/Call Number Information tab contains the call number, classification, and shelving scheme for the item. Most often this information is inherited by the holdings but on occasion an item requires unique location/call numbers, such as temporary locations (often used for course reserves).



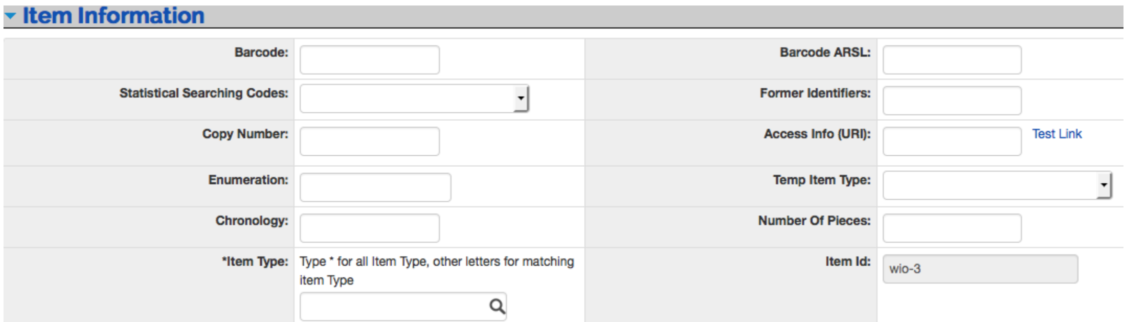
Items Location/Call Number Information tab definition

Title	Description
Prefix	Term that precedes a call number.
Shelving Order	A system-generated version of the call number that OLE uses for call number sorting. Because of the complexity of call numbers, in rare cases it may not be generated correctly to provide for proper sorting, so catalogers can edit it in order to change the sort order.
Call Number	The full call number without subfields. Click  to open **Call Number Browse** **Note** For more information on the interface, see Call Number Browse

Call Number Type	Scheme used to shelve a bibliographic item in the collections of the reporting organization. Select the Call Number Type from the drop down.

Item Information tab

The Item Information tab contains information unique to the item – barcode, identification number, copy and volume numbers, etc.



Item Information tab definition

Title	Description
Item ID	System supplied unique ID.
Barcode	A free text field for the identifier physically attached to an item as a unique identifier. Indexed to permit retrieval when the barcode is scanned or typed in as a search term. Used for identification of physical item and for circulation purposes. **Note** If you have an automated storage retrieval system that speaks to OLE, you should not use barcodes containing uppercase letters. These characters cause some of the API calls to fail. See OLE-7112.
Barcode ARSL	A free-text field for a separate barcode for the Automated Retrieval System Location (ARSL).
Former Identifiers	A free text field for recording previous barcodes of an item here in order to track changes and replacements. At the present time, this data element is not indexed.
Statistical Searching Codes	Locally defined value to be used in searching for/limiting searches for items and for statistical reporting. Your local system administrator will define these for use in your OLE system.
Temp Item Type	To temporarily change the item type, select a temporary item type from the drop down list. For example, an item on reserve needs to circulate according to a different circulation rule for a while.
Enumeration	Designation used to identify a specific part of a multipart title.
Chronology	Designation used to identify the issue date of a specific part of a multipart title. Enumeration and/or chronology data are typically included at the end of a call number to identify the specific volume of a multi-part item.
Copy Number	Library-assigned to distinguish each copy of the same title. If two or more copies of a work with the same call number are shelved together in the same place, you may record the copy number here. If different copies have different call numbers and/or shelve in different locations, it is recommended that different holdings records be used and that the copies not be identified at the holdings level.
Access Info (URI)	Optionally, record here the URL associated with a particular part of a multi-part electronic resource. Click **Test Link** to test the link. See Testing URIs in the Instance Editor

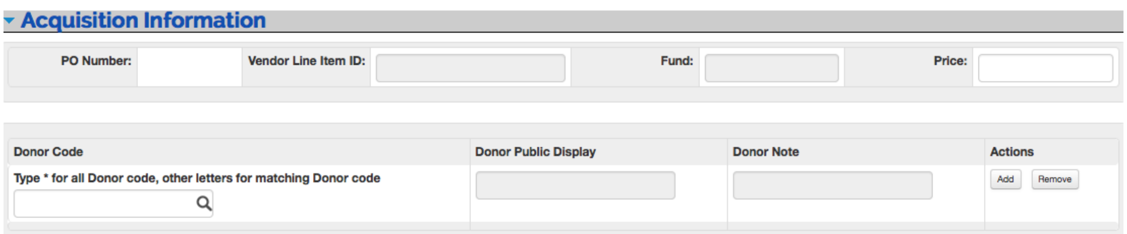
Item Type	Used in conjunction with Patron Type to determine a circulation policy for a particular item when a circulation transaction occurs. Each OLE library determines what Item Types it wishes to use. Typically, Item Types identify either a particular format of material ("Book") or a particular loan length ("2-hour loan").
Number Of Pieces	Record here the number of pieces of an item intended to circulate as a unit. For example, if the item is a book with an accompanying map in a separate pocket, you may wish to record "2" here. Note that this is an uncontrolled free-text field, so it is possible, if not necessarily desirable, to enter something other than a number.

Acquisition Information tab

Information from the purchase order is stored here. You may also track information about a donor if applicable. Click  to add donor information.

Note

In a future release, an electronic book plate will be linkable in this tab.

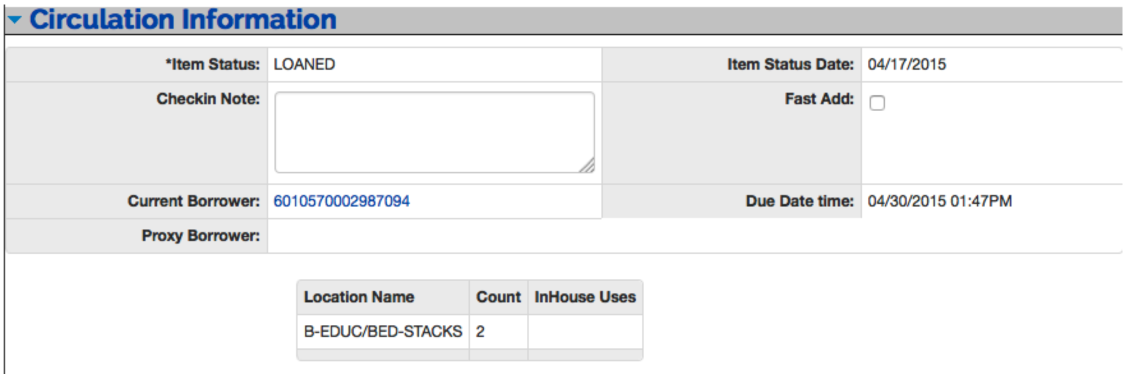


Acquisition Information tab definition

Title	Description
PO Line Item ID	System-supplied identifier for purchase order line item. Not editable.
Vendor Line Item ID	Captures the vendor ordering identifier to enable easier matching of additional information provided by the vendor after an initial order is placed. Not editable from within the item record.
Fund	This is the account number from the Purchase Order line item that appears in the accounting lines and represents the fund used to purchase the item. Not editable from within the item record.
Price	The price of the item from the Purchase Order. Free text, editable.
Donor Code	The Code of the donor. Enter the code or search for it from the lookup  .
Donor Public Display	A free-text, editable note regarding the donor of a particular item, to be used in the library's discover layer (OPAC).
Donor Note	A free-text, editable note regarding the donor of a particular item, or other source of acquisition, to be used by library staff only. Example: gifts

Circulation Information tab

The Circulation Information tab allows circulation and cataloging staff to communicate.



Circulation Information tab definition

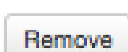
Title	Description
Item Status	Required. Select the item status from the drop down list.
Check in Note	Can be used to communicate messages to circulation staff when they are checking in the item
Current Borrower / Proxy Borrower	Identifies, by patron ID, the person to whom the item is currently checked-out. Click the ID to open the patron record.
Item Status Date	Date on which the item status was assigned to the item.
Fast Add	Can be used to trigger an automatic "route to cataloging" message upon return of Item from circulation (or simply to identify the Item as a "fast add" for purposes of later reporting). Default is set at the operator level.
Due Date Time	Date and time when a checked-out item must be returned.
Claims Return Flag	This flag may be checked if a borrower claims to have returned an item from circulation but there has been no circulation check-in transaction for the item. When checked, enter a corresponding Claims Return Date and note.
Item Damaged Status	This flag may be checked if an item has been damaged. When checked, enter a note to be displayed with circulation transactions.
Missing Piece Flag	This flag may be checked if an item is missing pieces. When checked, enter the number of pieces missing, the effective date, and note to be displayed with circulation transactions.

Extended Information tab

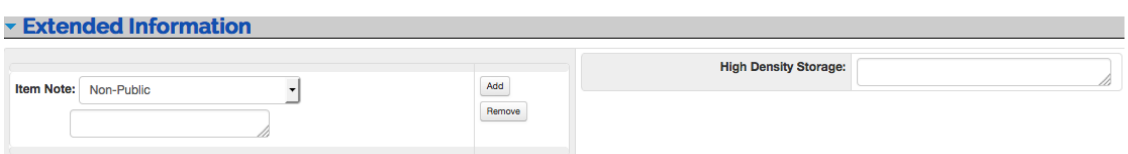
The Extended Information tab contains notes for the public or for staff and identifies high density storage information.

Click 

to add additional notes.

Click 

to remove excess notes.

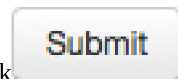


Extended Information tab definition

Title	Description
Item Note	Select public or nonpublic type from the drop down list to determine whether the note will be viewable from the discovery layer.
	Enter a note about the item.
High Density Storage	A free-text field intended to identify the row, module, shelf, and tray information for the item's high density storage location.

Process Overview

Adding New Holdings and Item Records to an Existing Bibliographic Description

1. Identify the bibliographic description to which an OLE Instance is to be added.
2. Click the  to call up Instance Editor from the bibliographic record.
3. Input required and optional data elements on the Holdings and Items tabs.
4. Click 

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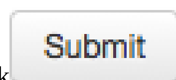
Editing Existing Holdings or Item records

1. Identify holdings or item records to be edited.
2. Edit selected data elements and add new as necessary
3. Click 

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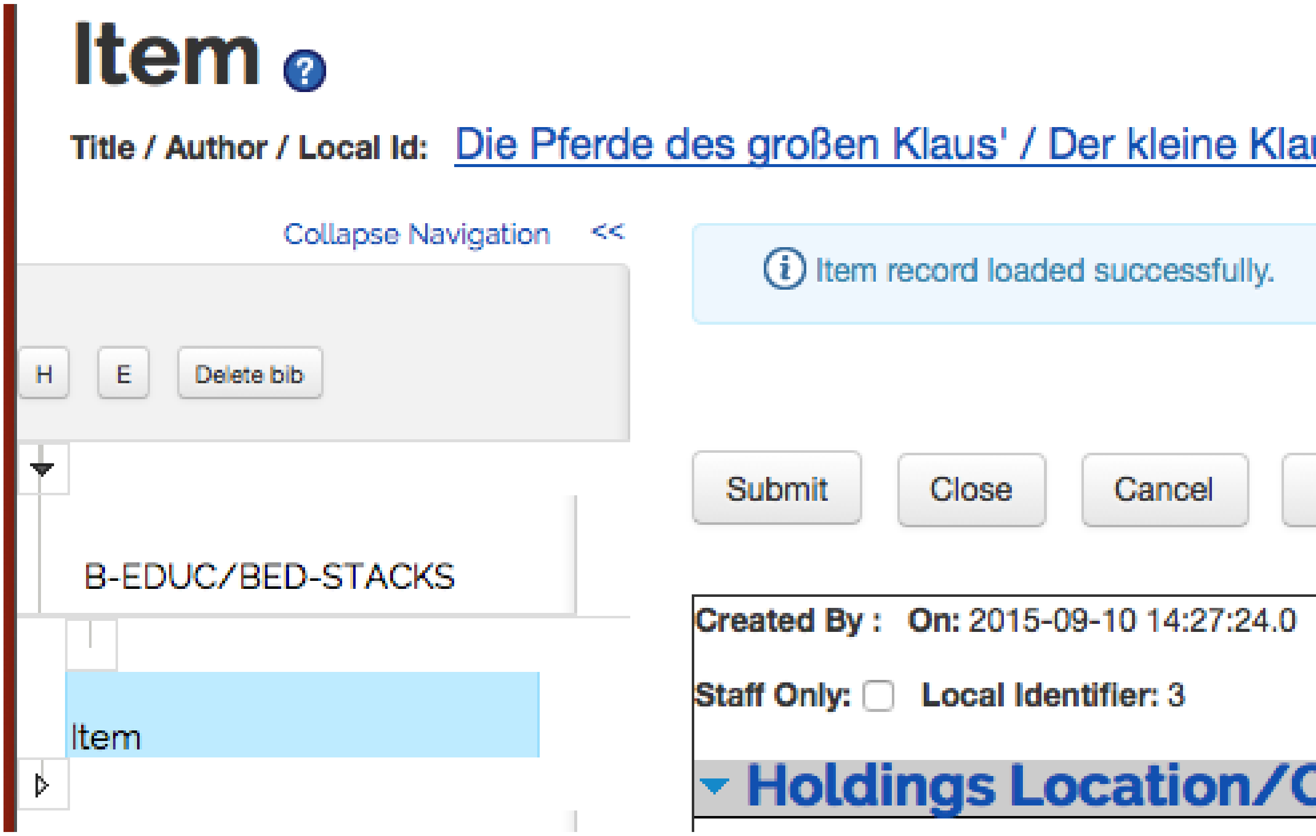
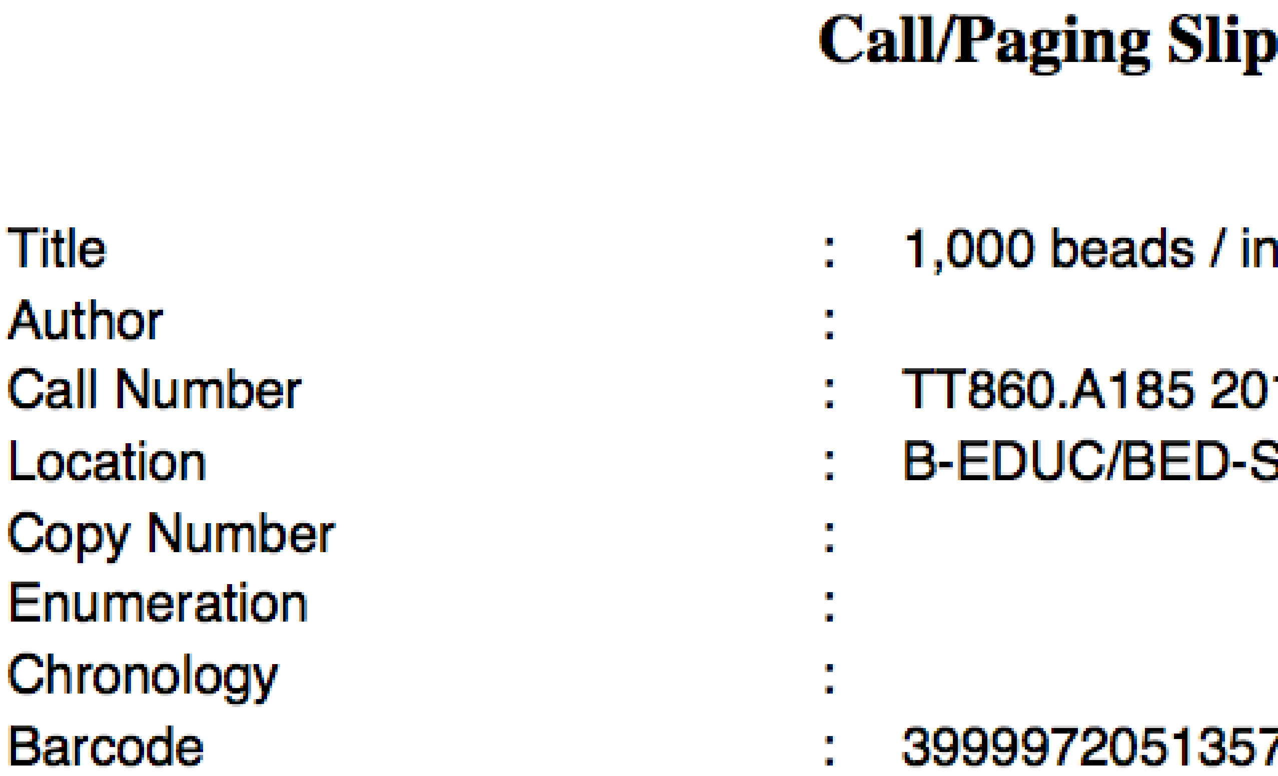
Printing Call Slips

To print a call or paging slip, click the **Print call slip** at the top of the item record.



A printer friendly document will be created containing the title, author, call number, location, copy number, enumeration, chronology, and barcode as they exist within the item and bibliographic records:

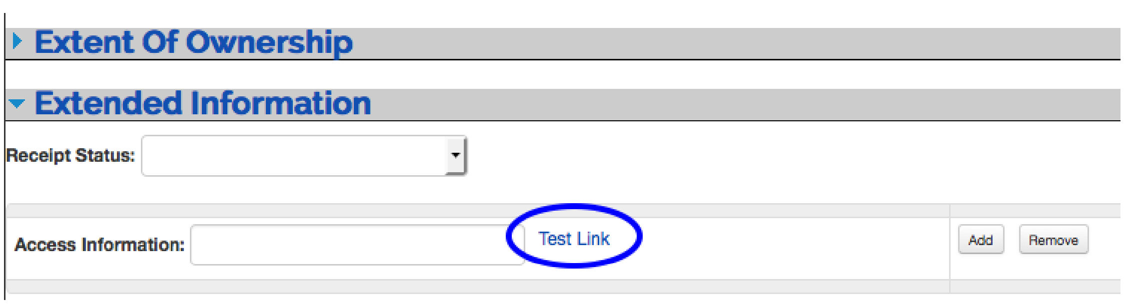


Testing URIs in the Instance Editor

OLE gives the user the opportunity to test Uniform Resource Identifiers (URIs) that are entered in holdings and item records. Both Holdings and Item records have a specified field for recording a URI. In that specified field, when recorded correctly, the URI will be hyperlinked. This provides the user an efficient means of testing the validity of a URI.

Holdings Record - Testing URIs

The Holdings record contains a specific field for a URI. That field is located in the Extended Information tab and is labeled Access Information.



When a URI is entered in the Access Information field and **Test Link**, pictured below the field in the screenshot, is clicked, a new browser window or tab will open with the web location requested by the

URI. In order for OLE to recognize a URI as a web address to be linked, it must begin with the protocol directive of http:// or https://.

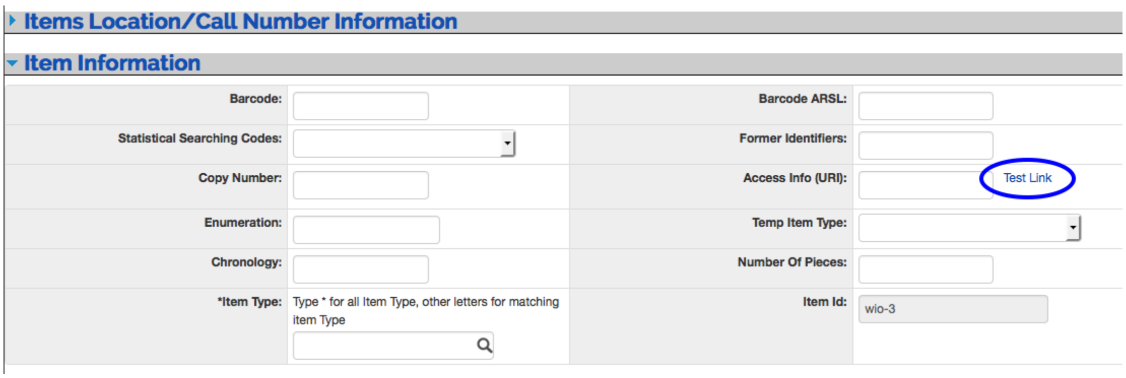
Example: http://catalog.hathitrust.org/Record/001101443

Test Link could appear below or to the right of the Access Information field, depending on the size of the browser window. Note that the Submit button at the bottom of the holdings record does *not* have to be clicked in order for the hyperlink to work.

If a URI is entered without http:// or https://, OLE will not recognize that text string as a web address and the user will not get a response when clicking on **Test Link**. If a URI is entered properly, but does not lead to a valid web page, clicking **Test Link** will cause the browser to open a new tab or window with an error message.

Item Record - Testing URIs

The Item record contains a specific field for a URI. That field is in the Item Information tab and is labeled Access Info (URI).



When a URI is entered in the Access Info (URI) field and **Test Link**, pictured to the right of the field in the screenshot, is clicked, a new browser window or tab will open with the web location requested by the URI. In order for OLE to recognize a URI as a web address to be linked, it must begin with the protocol directive of http:// or https://.

Example: http://www.gutenberg.org/ebooks/20293

If it is not recorded that way, OLE will not recognize that text string as a web address and the user will not get a response when clicking on **Test Link**. If a URI is entered properly, but does not lead to a valid web page, clicking **Test Link** will cause the browser to open a new tab or window with an error message.

Test Link could appear below or to the right the Access Info (URI) field, depending on the size of the browser window.

Note

The Submit button at the bottom of the item record does *not* have to be clicked in order for the hyperlink to work.

Business Rules

- A holdings record must be linked to an existing bibliographic record (and, in the case of a bound-with, may be linked to more than one bibliographic record).

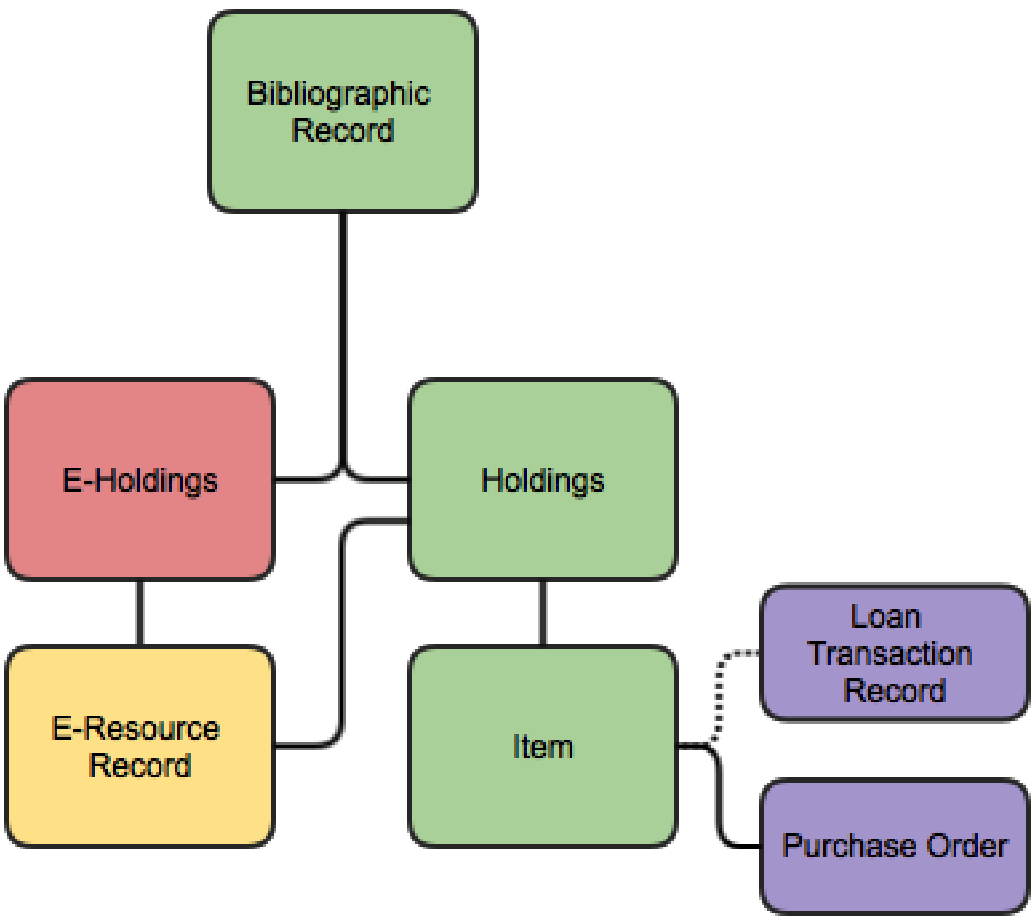
- An item record must be linked to an existing holdings record (and, in the case of an analytic, may be linked to more than one holdings record).
- A bibliographic record may have zero, one, or many holdings records attached, and a holdings record may have zero, one, or many item records attached.

Note

When displayed in the left pane, only a maximum of 5000 items per holding will be displayed.

E-Holding Editor (E-Instance)

The E-Instance / E-Holdings Editor are intended to support electronic resources. The E-Holdings (also called E-Instance) stands on its own; it does not have any associated item records. Instead, it combines some information from both OLE holdings and item records into a single record and adds other fields that are useful for managing electronic resources. A bibliographic record may have zero, one, or many E-Holdings records associated with and subordinate to it, in addition to OLE Instances. An E-Instance can also be linked to an E-Resource record to represent its participation in a larger electronic resource package. E-Instances can be created automatically when bibliographic records are imported or manually using the E-Holdings editor.



A user can create E-Instance records to store and view data about individual titles that make up an E-Resource purchase. The E-Instance record stores data that is unique to the title level, such as URL, coverage dates, and post-cancellation access dates. The E-Instance also inherits data from its parent E-Resource record. In some cases, however, this inherited data could vary and will require customization at the E-Instance level.

Because E-Instance records do not exist independently within OLE but are always linked to bibliographic records, the E-Holding Editor is most often invoked from the display of a particular bibliographic record. However, it is possible to search E-Holdings records separately from bibliographic records, and thus invoke the E-Holdings Editor that way. The E-Holdings Editor is not directly accessible from the OLE main menu.

Getting Started

Users may create an E-Instance from two different locations.

- From an E-Resource Record: On the **Select/Acquire** tab, under the **Acquisition** menu, click **E-Resource**.

  On the **Instance** tab of the **E-Resource Record**, click 

  .

  ## Note

  For additional information about the E-Resource Record, see the appropriate section in the *OLE Guide to Select and Acquire*

- From a Bibliographic Record: From the **Search Workbench** or on the **Describe** tab, under the **Create/ Edit Titles, Holdings or Items** menu, you may create a new bibliographic record and then an E-Holdings record from the **Bib Editor**.

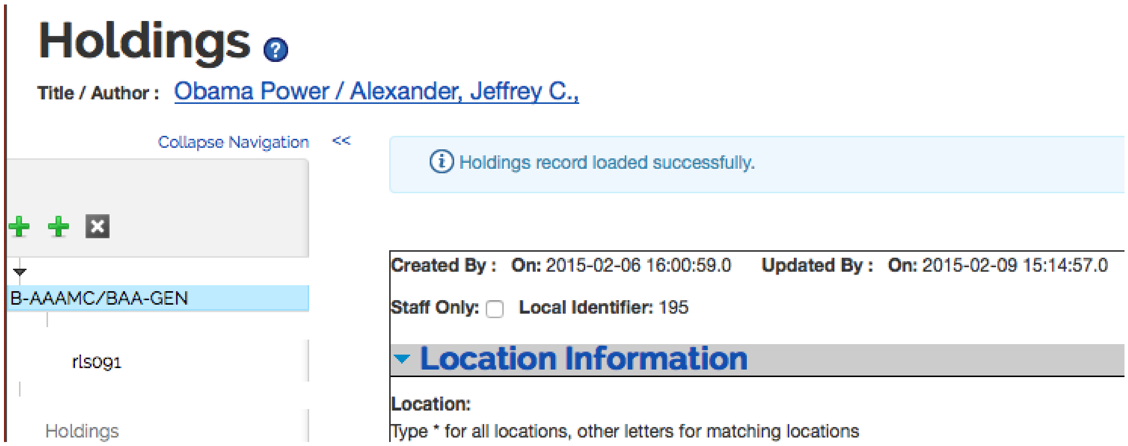
  ## Note

  For more information about Bibliographic Editors, see Bib Editor

  For more information about the Search Workbench, see Search Workbench

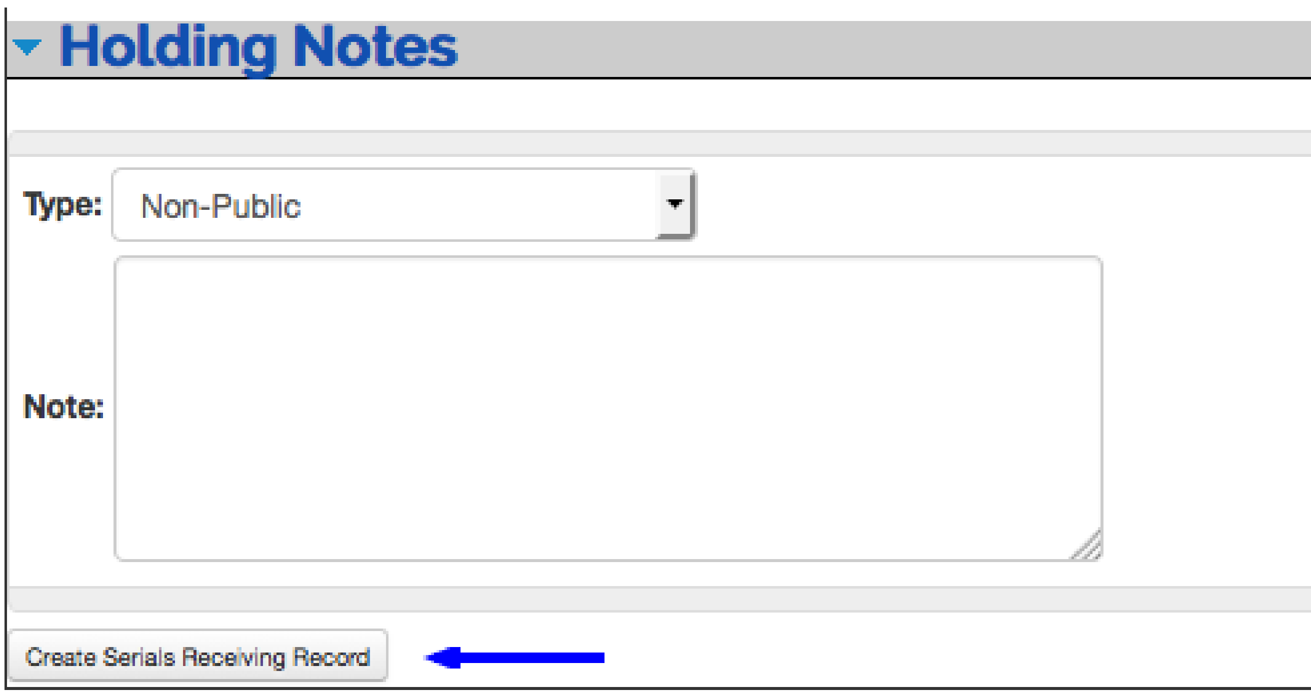
Document Layout

Navigation among the Bibliographic record, OLE Instances (holdings and items) and E-Instances is done by means of the links provided in the left pane. For a given bibliographic record, this menu will appear on the Bibliographic Editor screen, the Instance Editor (Holdings) screen, the Instance Editor (Item) screen, and the E-Holdings Editor screen. The complete list of holdings, items, and E-Instances associated with the bibliographic record is always available from the left pane regardless of which screen you are viewing



In the left pane, an E-Instance record is shown at the same level as a holdings record. It is identified by Location and E-Resource name elements in the E-Instance record. Not all of these data elements may be present. If neither of them are present, the E-Instance record will be identified by the word “E-Holdings” in the left pane until you add a Location or link it to an E-Resource and save it by clicking on the “Save” button.

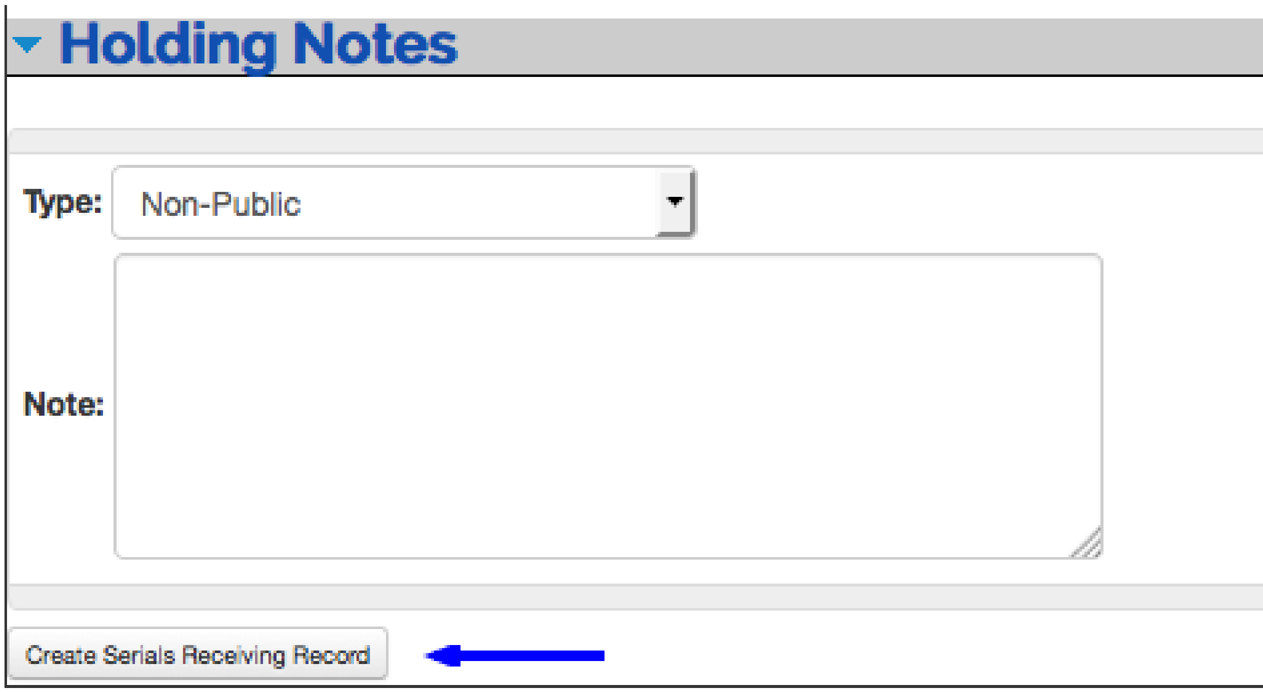
Click the second top level plus sign



to attach a new E-Instance E-Holdings record to a bibliographic record in the Bib/Instance Editor. Hover over either of the two "+" signs to see a pop-up note identifying which creates an Instance verses an E-Instance. When creating a new E-Instance, the ‘E-Holdings’ label will appear in the left pane after clicking **Save** if you do not add a Location field and the E-Instance is not linked to an E-Resource.

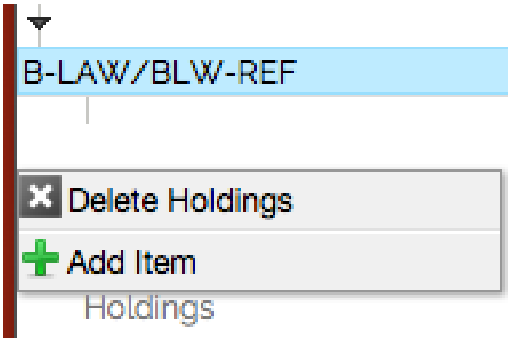
Note

To add an Instance Holding Record, click the first top level plus sign



For more information about the OLE Instance Editor, see [Instance Editor](#)

Right click on the call number to delete an Instance or E-Instance record or add an item record.



If you delete the E-Instance, it will be removed immediately without requiring any confirmation. You can also select the E-Instance in the left pane and click the **Delete** button in the E-Holdings Editor. This will also delete the E-Instance immediately without requiring confirmation.

Click the top level to delete the current bibliographic record. You will be asked to confirm that you actually want to delete the record before you may proceed. If you do not wish to delete the record, click on “Cancel”; you will then be returned to the OLE Describe menu instead of the record you have been working on.

Note

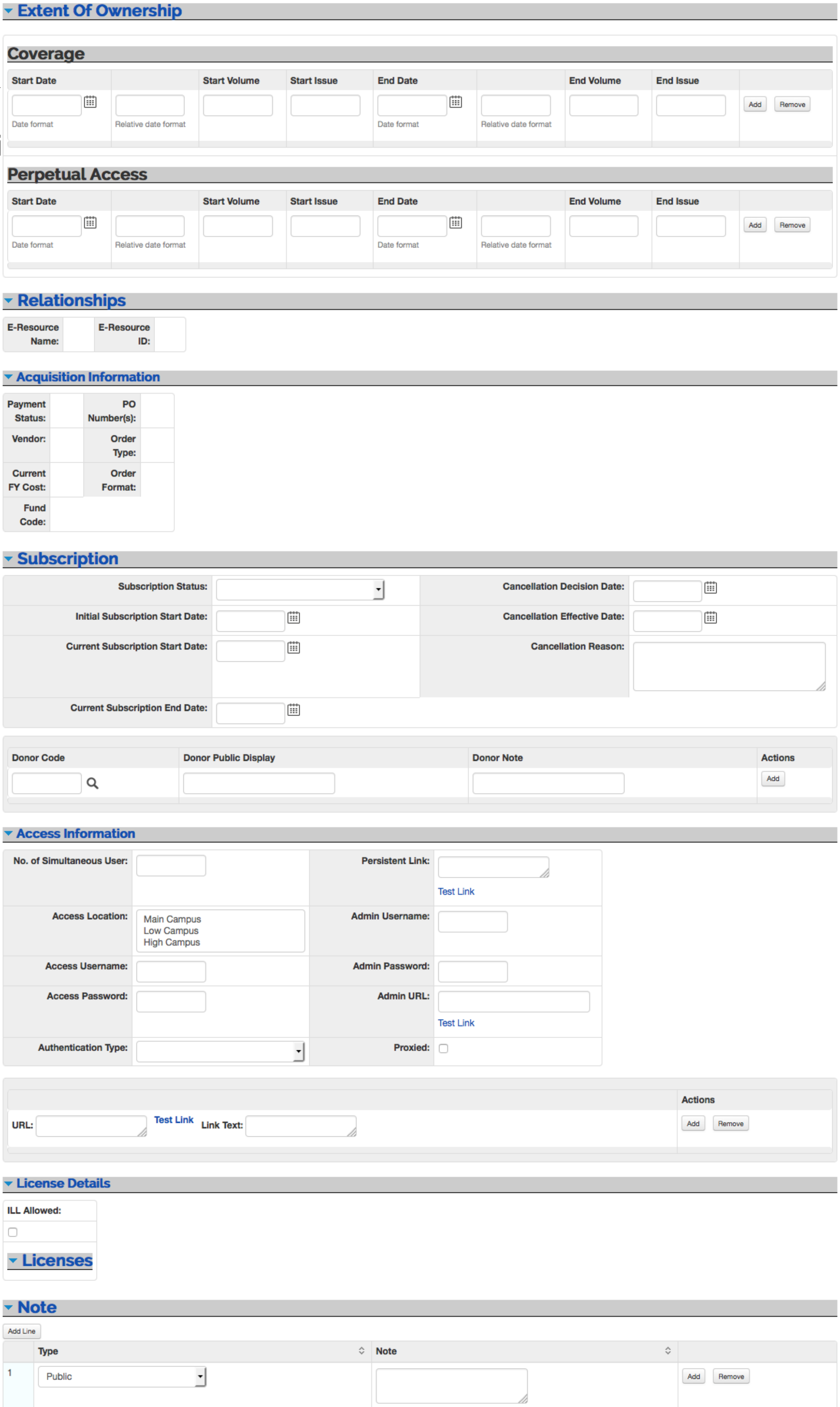
Although you will still be viewing the E-Instance in the editor, if you navigate away from it you will find it has been fully deleted.

Note

In future releases, you will receive an error message if you attempt to delete an EInstance that is linked to a PO.

You can hide the entire left pane from the screen display by clicking on the "Collapse Navigation" command at the top of the pane. To restore the left pane, click on the double right arrows (>>).

E-Holdi

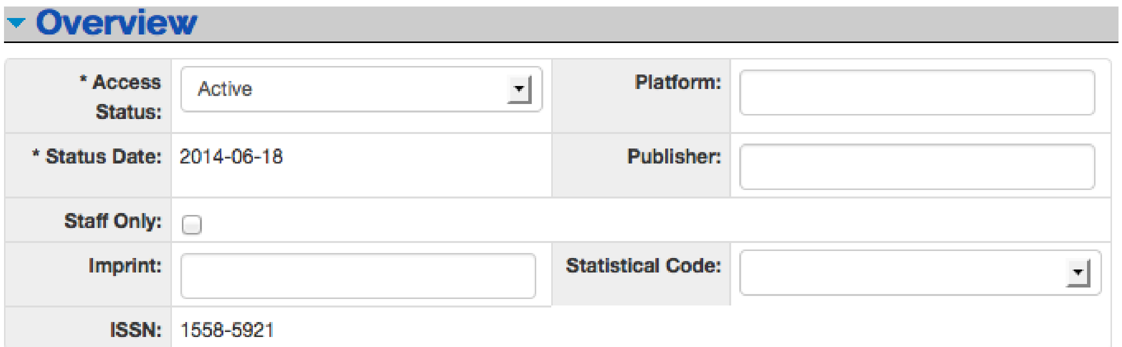

Extent Of Ownership
Coverage
Start Date
Start Volume
Start Issue
End Date
End Volume
End Issue
Date format
Relative date format
Add
Remove
Perpetual Access
Relationships
E-Resource Name:
E-Resource ID:
Acquisition Information
Payment Status:
PO Number(s):
Vendor:
Order Type:
Current FY Cost:
Order Format:
Fund Code:
Subscription
Subscription Status:
Cancellation Decision Date:
Initial Subscription Start Date:
Cancellation Effective Date:
Current Subscription Start Date:
Cancellation Reason:
Current Subscription End Date:
Donor Code
Donor Public Display
Donor Note
Actions
Access Information
No. of Simultaneous User:
Persistent Link:
Test Link
Access Location:
Main Campus
Low Campus
High Campus
Admin Username:
Access Username:
Admin Password:
Access Password:
Admin URL:
Authentication Type:
Proxied:
URL:
Link Text:
License Details
ILL Allowed:
Licenses
Note
Add Line
Type
Public

The E-Holdings ID is a system generated identification number.

The E-Instance E-Holdings record includes these tabs -- **Overview**, **Location Information**, **Call Number Information**, **Extent of Ownership**, **Relationships**, **Acquisition Information**, **Access Information**, **License Details**, and **Note**.

Overview tab

The Overview tab contains a summary of critical information about the E-Holding.

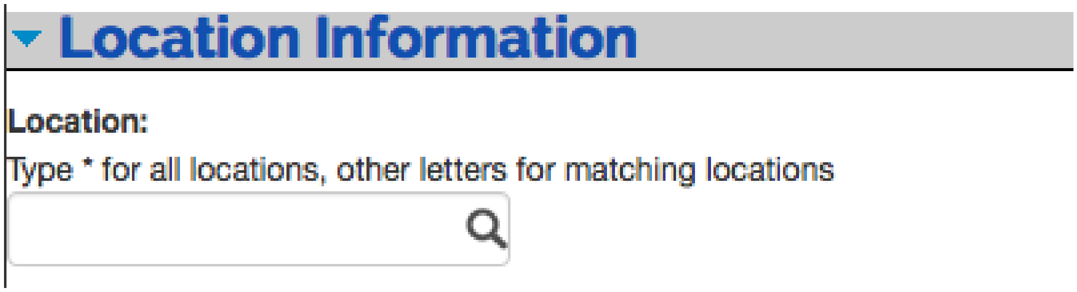


Overview tab definition

Title	Description
Access Status	Required. Defines whether the electronic resource has content that can currently be accessed by users. Defaults to active.
Status Date	System generated and display only. Displays the date that the Access Status was last modified and saved.
Staff Only	Staff only indicator. Check to keep the E-Instance from being displayed in the public view.
Imprint	The name of the electronic title's imprint. For example "Academic Press." In a future release, this will link to an existing Organization record in OLE.
ISSN	The ISSN of the electronic title. Must be formatted as XXXX-XXXX.
Platform	The name of the electronic title's platform. For example "JSTOR." In a future release, this will link to an existing Platform record in OLE.
Publisher	The name of the electronic title's publisher. For example "Elsevier". In a future release, this will link to an existing Organization record in OLE.
Statistical Code	Locally defined value to be used in searching for/limiting searches for items and for statistical reporting. Possible values for this field are the same as for the item record Statistical Searching Code. **Note** If no Statistical Code has been set on the E-Instance and the E-Instance is tied to an E-Resource, the Statistical Code set on the E-Resource will display here.

Location Information tab

The Location Information tab includes locations set up at each institution to describe where a resource is available or otherwise categorize it for searching / reporting / display purposes.

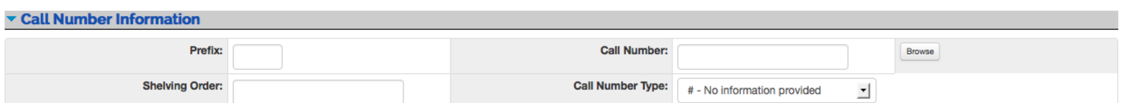


Location Information tab definition

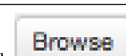
Title	Description
Location	Select the location from the drop down list. Begin typing and a list of options will appear. Enter “*” (asterisk) to display the complete list.

Call Number Information tab

The Call Number Information tab contains the call number, classification, and shelving scheme for the E-Holdings.



Call Number Information tab definition

Title	Description
Prefix	Term that precedes a call number.
Shelving Order	A system-generated version of the call number that OLE uses for call number sorting. Because of the complexity of call numbers, in rare cases it may not be generated correctly to provide for proper sorting, so catalogers can edit it in order to change the sort order.
Call Number	The full call number, not subfielded. Click  to open **Call Number Browse** **Note** For more information on the interface, see Call Number Browse
Call Number Type	Scheme used to shelve a bibliographic item in the collections of the reporting organization. Select the Call Number Type from the drop down.

Extent of Ownership tab

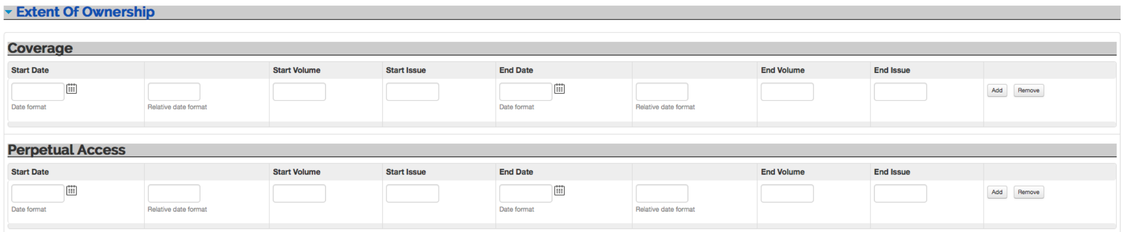
The Extent of Ownership tab contains the coverage and perpetual access start and end dates and issues for institutions. It is stored as specific dates, volumes, and issues, rather than as textual summary holdings, to allow for data that could be utilized by a link resolver in the future. There can be multiple Coverage dates and multiple Perpetual Access dates for a single E-Instance.

Note

If no Perpetual Access or Coverage Dates have been set on the E-Instance and the E-Instance is tied to an E-Resource, any dates set on the E-Resource will display here.

Click 

to add Coverage or Perpetual Access lines. Click **Remove** to remove an existing Coverage or Perpetual Access line.



Extent of Ownership tab: Coverage and Perpetual Access definitions

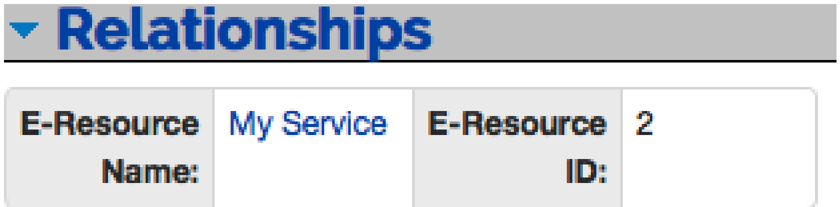
Title	Description
Start Date	Start date of electronic coverage / perpetual access. This must be specified as DD/MM/YY. This is pulled from the E-Resource record but can be modified.
Relative Date Format	If an approximate date is needed instead of a fixed date, enter a relative, rolling date. The format needs to be written as one of the following: x calendar years ago (for example: 2 calendar years ago) 1 day/week/month/year ago (for example: 1 month ago) x days/weeks/months/years ago (for example: 2 weeks ago)
Start Volume	Start volume of electronic coverage / perpetual access. This is pulled from the E-Resource record but can be modified.
Start Issue	Start issue of electronic coverage / perpetual access. This is pulled from the E-Resource record but can be modified.
End Date	End date of electronic access / perpetual access. This must be specified as DD/MM/YY. This is pulled from the E-Resource record but can be modified.
Relative Date Format	If an approximate date is needed instead of a fixed date, enter a relative, rolling date. The format needs to be written as one of the following: x calendar years ago (for example: 2 calendar years ago) 1 day/week/month/year ago (for example: 1 month ago) x days/weeks/months/years ago (for example: 2 weeks ago)
End Volume	End volume of electronic coverage / perpetual access. This is pulled from the E-Resource record but can be modified.
End Issue	End issue of electronic coverage / perpetual access. This is pulled from the E-Resource record but can be modified.

Relationships tab

The Relationships tab identifies any associated E-Resource and Instance records. No data on this tab can be modified from the E-Holdings editor. If an E-Resource is linked to this E-Holdings, the name and ID of that E-Resource will display in this section. Click the name to open the linked E-Resource record.

Note

For additional information about the E-Resource Record and linking E-Instances, see the appropriate section in the *OLE Guide to Select and Acquire*

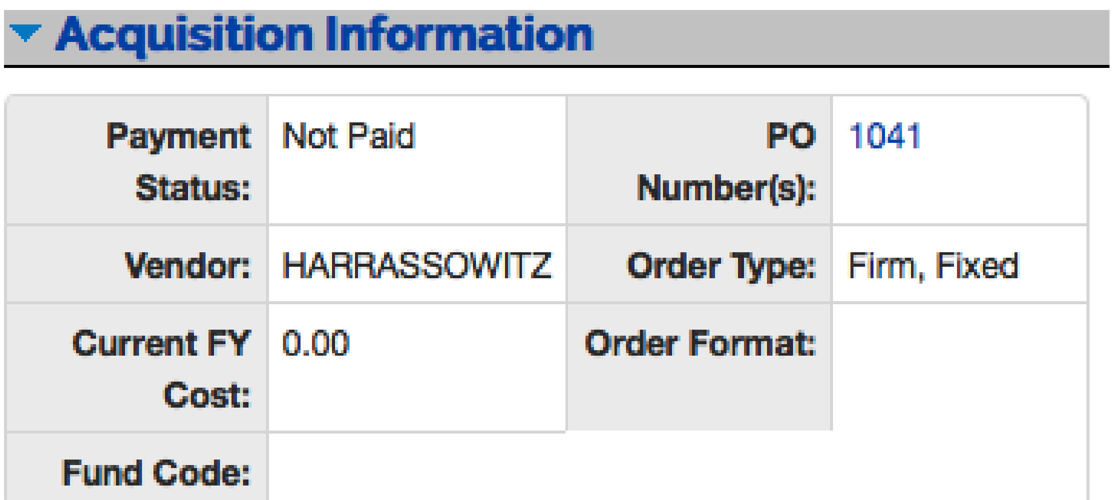


Acquisition Information tab

The Acquisition Information tab contains the relevant purchasing information from the Purchase Order and Invoice. Additionally the Acquisition Information tab contains information about any donors. Remember, you must click  to add donor information.

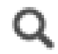
Note

In 1.6, Purchase Orders and Invoices cannot be linked to E-Instances, so this data will not appear in the E-Instance. (see OLE-4934)



Acquisition Information tab definition

Title	Description
Subscription Status	Current subscription status of the electronic resource. Locally configurable.
PO Number(s)	Display-only. ID of the purchase order(s) to which the E-Instance is linked.
Order Type	Display-only from the PO(s). Order type of the purchase order(s) to which the E-Instance is linked. For example "subscription" or "one-time purchase".
Order Format	Display-only from the PO(s). Format of the current purchase order(s) to which the E-instance is linked.
Payment Status	Display-only from the Invoice. If a current FY payment has been made, status will be Paid; if no current FY payment, status will be Not Paid
Vendor	Display-only from the PO(s). The vendor of the electronic resource.

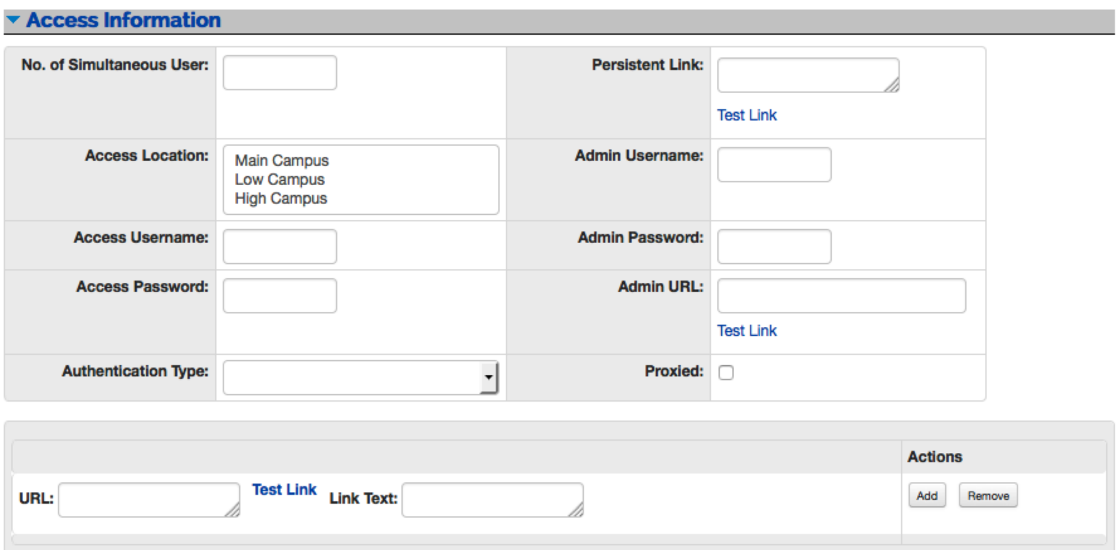
Current FY Cost	Display-only from the Invoice. The sum total of the current year's payment for the electronic resource.
Fund Code	Display-only from the Invoice. The account number for the electronic resource.
Donor Code	The Code of the donor. Enter the code or search for it from the lookup  .
Donor Public Display	A free-text, editable note regarding the donor of a particular electronic resource, to be used in the library's discover layer (OPAC).
Donor Note	A free-text, editable note regarding the donor of a particular electronic resource to be used by library staff only. Example: gifts

Access Information tab

The Access Information tab contains all information about accessing the electronic title including the links, user names and passwords.

Note

A number of the fields on the Access Information tab are inherited from the E-Resource so that if they have not been set on the E-Instance and the E-Instance is tied to an E-Resource, any dates set on the E-Resource will display here.



Access Information tab definition

Title	Description
No. of Simultaneous Users	The number of users who can simultaneously access the electronic resource at one time. This is pulled from the E-Resource record but can be modified.
Access Location	The institutional location(s) where the electronic resource may be accessed. Select a locally configured option(s) from the drop down list. This is pulled from the E-Resource record but can be modified.
Access Username	The user name to use to access the electronic resource, if necessary. This is pulled from the E-Resource record but can be modified.
Access Password	The password to use to access the electronic resource, if necessary. This is pulled from the E-Resource record but can be modified.

Authentication Type	The type of Authentication needed for the electronic resource. Select the type from the drop down list. This is pulled from the E-Resource record but can be modified.
Persistent Link	The locally assigned persistent URL for the electronic resource.
Admin Username	The administrative user name used to access the platform portal to manage the electronic resource.
Admin Password	The administrative password used to access the platform portal to manage the electronic resource.
Admin URL	The administrative URL to access the platform portal to manage the electronic resource. This is site users would go to enter their IP ranges, input their link-resolver URL, manage the look and feel of the platform for their users, gather usage stats, etc.
Proxied	Check the box if access to the electronic resource is proxied.
URL	The URL for users to access the electronic resource.
Link Text	Publicly displayable information aside from coverage statement associated with a specific link. For example "PDF version".

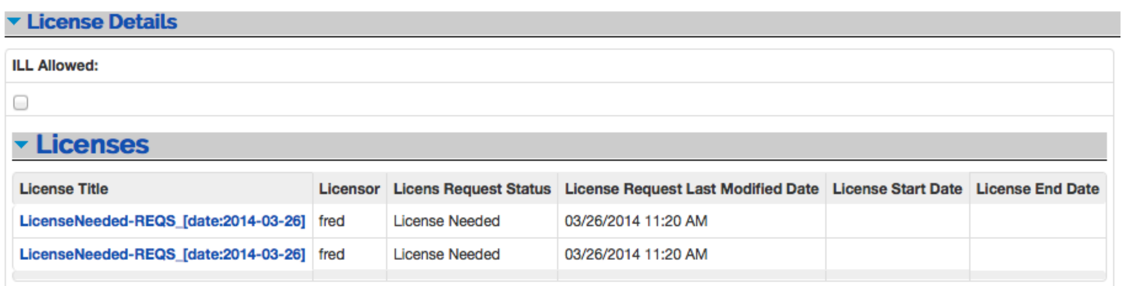
License Details tab

The License Details tab identifies any License Requests that are associated with an E-Resource to which this E-Holdings is linked and stores manually entered simple ILL permissions (check the box to allow).

License Requests are pulled from the linked E-Resource Record. In 1.6, this is the only way to link E-Instances with License Requests (see OLE-2700).

Note

For more information on License Requests and E-Resource Record, see the appropriate sections in the *OLE Guide to Select and Acquire*.

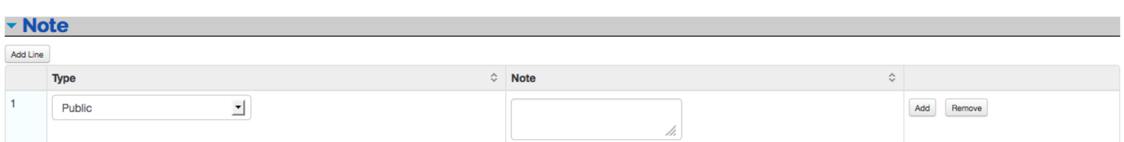


Note tab

The Note tab contains public and nonpublic notes that apply to the E-Instance record.

Click  to add notes.

Click **remove** to remove existing notes.



Note tab definition

Title	Description
Type	Select public or Non-Public from the drop down list to determine whether the note will be viewable from the discovery layer.
Note	A free-text field to record information about this E-Instance.

Process Overview

Adding a New E-Instance to an Existing Bibliographic Description

1. Identify the bibliographic description to which an E-Instance is to be added.
2. Click the + to call up E-Holdings Editor from the bibliographic record.
3. Input required and optional data elements on the E-Holdings tabs.
4. Click Save.

Editing an Existing E-Instance

1. Identify bibliographic description and E-Instance to be edited.
2. Edit selected data elements and add new as necessary.
3. Click Save.
4. You may revert all E-Instance fields back to the default OLE record values by clicking button labeled **Restore OLE defaults**.

Buttons / Actions

Unlike the Instance Editor, the E-Holdings Editor has a repeated series of buttons at the top **and** bottom of the editor.

- The Restore OLE defaults button will re-set any fields on the E-instance that are inherited from the E-Resource back to the default values specified on the E-Resource, overwriting any local changes. This includes fields like Statistical Code, Coverage Dates, Perpetual Access Dates, Authentication Type, Number of Simultaneous Users, and Access Location.
- The Save button will save any edits to the E-Instance.

- The 

button will close the E-Holdings Editor without saving any changes to the E-Instance.

- The 

button will create a new E-Instance with all of the same metadata except the E-Instance ID. The new E-Instance will retain any linkages to the E-Resource Record that were part of the original E-Instance.

- The 

button will delete the E-Instance immediately.

Note

Although you will still be viewing the E-Instance in the editor, if you navigate away from it you will find it has been fully deleted.

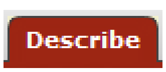
Business Rules

- An E-Holdings record must be linked to an existing bibliographic record.
- A bibliographic record may have zero, one, or many E-Holding records attached.

Note

When displayed in the left pane, only a maximum of 5000 E-Holdings will be displayed.

Global Changes of Holdings or Items



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Occasionally the work of a staff user will require making the same changes to multiple holdings, E-Holdings, or item records. OLE's Global Changes of Holdings or Items functionality allows the user to identify records to be edited and then to make the same edits to all of the selected records with a single command. Records to be globally edited can be identified by entering a search term or by importing a list of local identifiers or barcodes.

Because it is such a powerful tool, it is likely that institutions will limit authorization for this functionality.

The holdings or e-holdings records to be changed may be attached to the same bibliographic record and/or to different bibliographic records. The item records to be changed may be attached to the same holdings record and/or to different holdings records.

The user must choose between globally editing holdings records, e-holdings records, or item records. If a user wants to edit both holdings and item records globally, for example, it must be done in two separate global edit processes.

Note

Bibliographic records cannot be globally edited within OLE – they must be exported and globally edited using other software. The globally edited bibliographic records can then be imported back into OLE. To learn more about Batch Processes, see Batch Processes in the *Guide to OLE System Administration Module*.

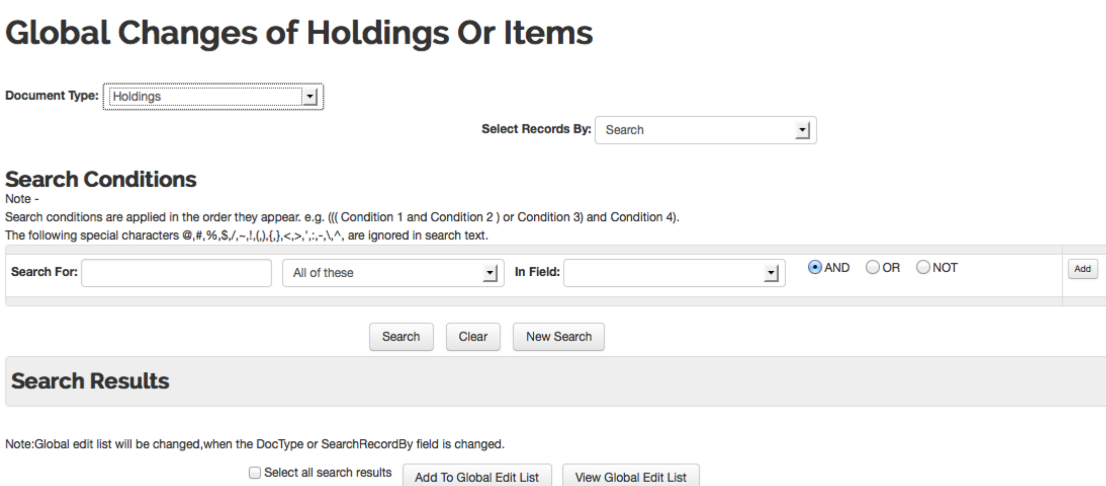
Getting Started

Authorized users can access Global Changes of Holdings or Items functionality from the **Describe** tab under **Create/Edit Titles, Holdings or Items** by clicking on the **Global Edit of Holdings/Items/E-Holdings** link.

You will be presented with an interface where you can select holdings, e-holdings, or items from a drop-down list as document type. This selection will also determine the type of record that you will be able to globally edit. Select records to be globally edited via one or more searches or by importing one or more lists of local identifiers or barcodes, creating a list of records that can be selected for global editing. Once all desired records have been added to the list, enter changes to the record from an edit screen of a holdings, e-holdings or item record. Once submitted, the changes entered on this edit screen will be made to ALL of the records selected for global editing.

The fields available for global editing of holdings/e-holdings/item records are locally configurable by system administrators.

Process Overview

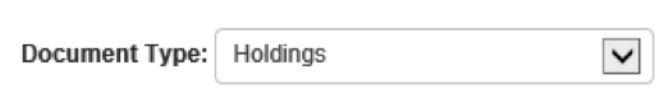


Identifying Records to Be Globally Edited

There are two methods to identify holdings/item/e-holdings records to be globally edited. One method is to select records retrieved by search term(s) entered into the global edit search interface. The other method is to import a list of local identifiers or barcodes and then select from the records retrieved from the list.

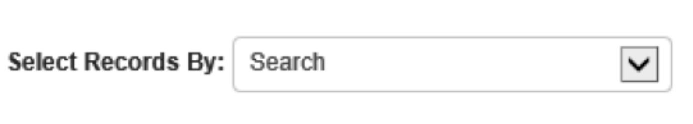
Whether records are being selected from a search entered or from an imported list, the initial steps are the same:

1. The **Global Changes of Holdings or Items** process begins by identifying the type of records to be globally edited. First, choose a **Document Type** from a drop-down list. The choices for a document type are limited to holdings, e-holdings, and items. The default document type is holdings.



It is important to understand that the choice of document type for a search or import also determines the type of records that can be globally edited. If “Holdings” is selected for the document type, then only holdings records can be globally edited. For example, you cannot search for holdings records and then globally edit a field found only on item records.

2. Next designate whether records to be globally edited will be identified by entering search term(s) or by importing a list of local identifiers or barcodes. To enter a search for records to be globally edited, use the default “Search” in the **Select Records By** drop-down list. To import a list, select “Import” in the drop-down list.



To identify records by entering search term(s), follow the steps in the Searching section of this document. To identify records by importing a file of local identifiers or barcodes, follow the steps in the Importing section of this document.

Searching

After completing the two steps under Identifying Records to Be Globally Edited, follow these steps to identify records to be globally edited via a search entered by the user.

1. Enter a search in a simple search interface.

   - The term(s) to be searched are entered in the **Search For** box:

   - Next select from the drop-down list:

     a. All of these: all terms are found in the specified field

     b. Any of these: any of the terms are found in the specified field

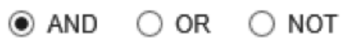
     c. As a phrase: all terms must appear in the specified order

Note

If no search term(s) are entered, all of the records matching the document type will be in the search results.

- Select a field to be searched from the **In Field** drop-down list customized for the document type identified. Leaving this selection the default blank or selecting ANY will search all fields listed in the drop-down list.

- Finally select a Boolean operator for the search, with "AND" being the default operator:



2. Click Search. Other options are Clear to retain the document type but otherwise begin the search anew and **New Search** to return to the default initial Global Edit screen.

3. If continuing with the global edit process, follow the instructions below in the "Selecting Records to Be Globally Edited from a Results List" section.

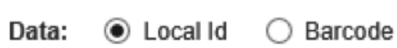
Importing

After completing the two steps under Identifying Records to Be Globally Edited, follow these steps to identify records to be globally edited by importing a list of local identifiers or barcodes.

1. Have a list of local identifiers (for holding, item, or e-holding records) or barcodes (for item records) in a .txt file.

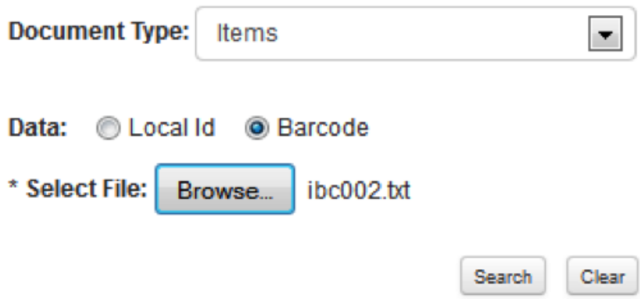
2. Select "Import" in the **Select Records By** drop-down list.

3. Select the kind of data being imported. If either "Holdings" or "E-Holdings" is selected as a Document Type, the only option is "Local Id." If "Items" is selected as a Document Type, you can choose between "Local Id" or "Barcode" for the "Data" selection. If the data is local identifiers, be sure to have on the list local identifiers for the document type selected. For example, if you want to globally edit holdings records, be sure that the local identifiers are from holdings records and not from item or bibliographic records.



4. Identify the file that contains the list of local identifiers or barcodes, by clicking on the **Browse** button (or **Choose File** depending on your browser) next to "Select File." Highlight the file to be imported in the browse window and click **Open**.

5. The name of the file will appear to the right of the **Browse** button.

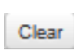


6. Click 

to find the records matching the data points in the imported list. You will see the results of the import, e.g.:

   - Selected File Name: holding ids.txt
   - Records In File: 5
   - Matched Records Count: 4
   - Unmatched Records Count: 1
   - Unmatched Records are: 5001

   “Unmatched Records” will not be in the search results, as records were not found. Note that you are shown the total number of unmatched records, as well as the local identifier or barcode number(s) that were not found.

7. Click 

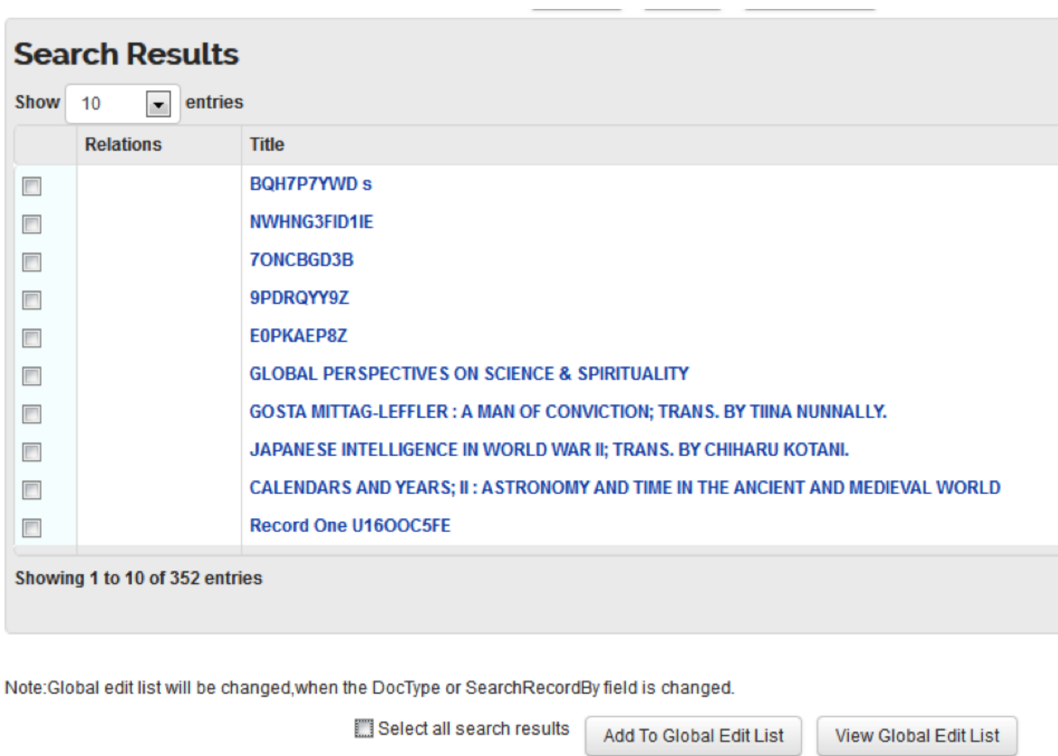
to browse for a different file.

8. If continuing with the global edit process, the user should follow the instructions below in the “Selecting Records to Be Globally Edited from a Results List" section.

Selecting Records to be Globally Edited from a Results List

From this point on the process is the same regardless of whether you entered terms for search or imported a list of local identifiers/barcodes.

1. A results list will appear at the bottom of the screen after you execute a search of entered term(s) or import a list. Below is an example results list:



The search results will provide the title regardless of whether the document type is holdings, e-holdings or item records. A holdings search results set will also include the location and call number, when available. An e-holdings search results set will also include access status, platform, imprint, and statistical code, when available. An item search results set will also include item location, call number, barcode, item status, copy number, enumeration, and chronology, when available.

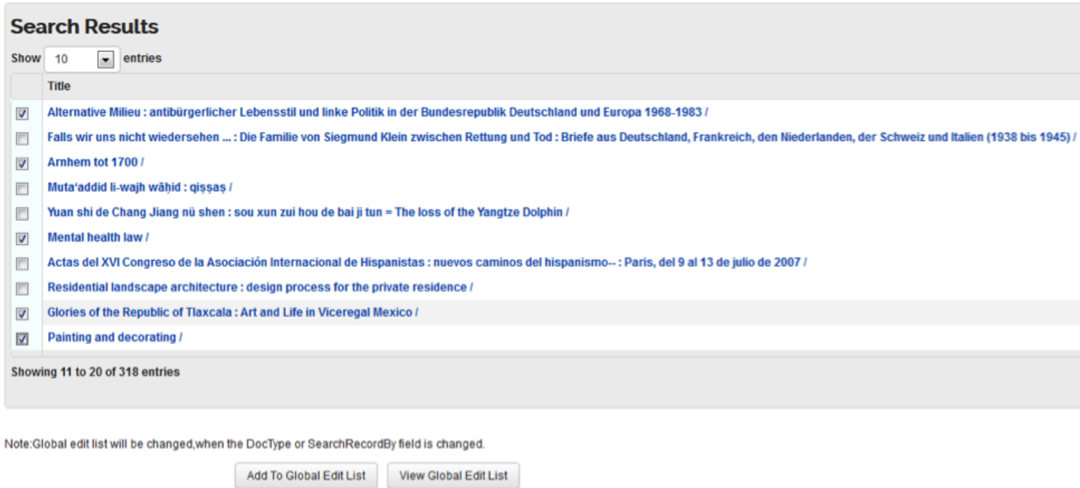
2. Options on the search results screen include:

   - The number of entries displayed on a screen is locally configurable, with a default selection of 10, 25, 50, 75, or 100 records per screen, selected via a drop down list. Note that you can see the total number of records in the search results just below the list.

   - At the bottom of the list on the right, you can click on **Next** to go to forward one screen of results or **Previous** to go back one screen.

   Once the " Submit " button has been pressed, any blank indicators will display as a pound (#) sign.

3. To select records for global editing, put a check in the box to the left of the title(s) in the search results or click **Select All** to select all records on all screens of the search results.



4. Once you have selected the records on the screen to be globally edited or have used the "select all" option, click on **Add To Global Edit List** to add the records to the list to be globally edited.

   ### Note

   If you are selecting records screen-by-screen, click **Add To Global Edit List** on each screen before displaying another screen. Failure to do so will omit the checked records from the global edit list.

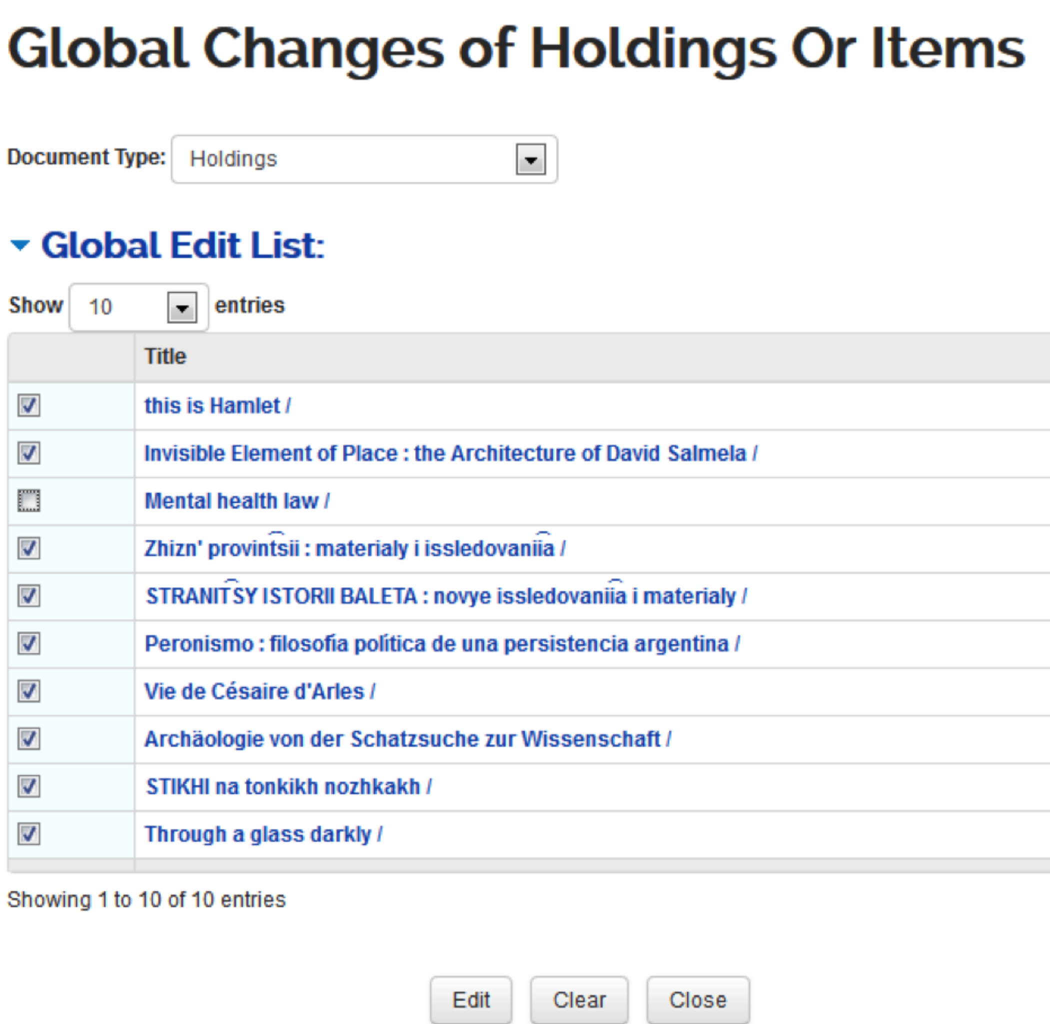
5. Once records from a search results set have been selected, you have a couple of options:

   - If all desired records for the global edit process were in the initial search results set, you can go on to step 6 below.
   - If additional records are desired, you can enter a new search or import a new list of local identifies or barcodes and add to the global edit list. You can add records to the same global edit list repeatedly with additional searches or imported lists.

   ### Note

   In order to add to the list, you must not close the Global Edit interface. Doing so will result in the loss of the global edit list created in the earlier selection process. You must complete the selection of records to be added to the same global edit list and the editing of the records within the same session in the Global Edit interface.

6. Once you have selected the records for global editing have been selected, click on **View Global Edit List** to review the list of selected records.



7. From this list you can remove the checks to the left of a title to eliminate a record from the global editing process. In the above example “Mental health law” will not be globally edited, because the check has been removed for that title.

8. Other options on this screen are:

   - Clear: This empties the global edit list of all selected records.
   - Close: This closes the global edit list and returns the user to the search results.
   - Edit: This opens up an editor for the document type selected for the global edit process.

Completing the Global Editing Process

1. After clicking 

on the above screen you will see an editor screen for a holdings, an e-holdings, or an item record, depending on the document type designated for the search.

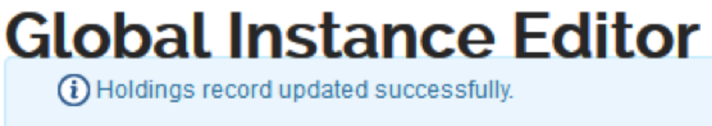
2. Any editing done on this screen will be made to all records in the global edit list. You will be able to edit any field that is not “grayed out.” Fields eligible for global editing are locally configured by a systems administrator.

3. When the editing is done, click 

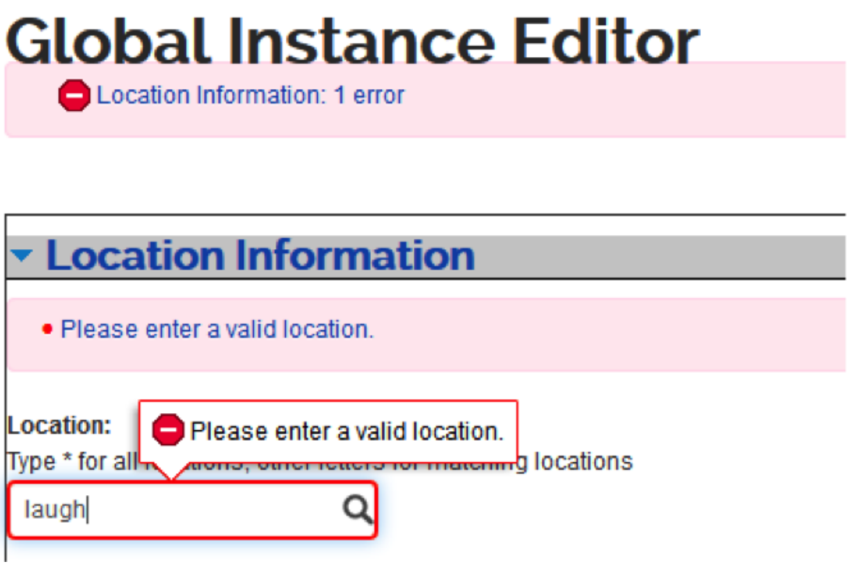
to complete the global editing process. You can also click 

to end the process, close the editor, and return the user to the global edit list.

4. If global editing is completed and successful, you will see confirmation at the top of the editor:



5. Global editing of holdings, e-holdings, or item records has the same data validation requirements that are applied when editing a single holdings, e-holdings or item record. If invalid data is entered for a global edit, you will see an error message, for example:



If this happens, correct the error and click **update** again.

Business Rules

- Bibliographic records cannot be globally edited within OLE.

- Holding or E-Holding records to be globally edited may be attached to the same bibliographic record and/or to different bibliographic records.
- Item records to be globally edited may be attached to the same holdings record and/or to different holdings records.
- A single global editing process can change only one document type: Holdings, E-Holdings, or Item.
- The document type selected for search or import also determines the document type that can be globally edited.
- Records to be globally edited can be identified by entering search terms in a search interface or by importing a list of Local Identifiers or Barcodes in a .txt file.
- Fields eligible for global editing on holdings/e-holdings/items are determined by settings made by a local systems administrator.
- Global editing must meet the same validation requirements applied when editing a single holding/item/e-holding record.
- Authorization to use the global editing functionality in OLE can be restricted to specified users.
- Imported files to globally edit the Holdings or E-Holdings document type are limited to Local IDs.
- Imported files to globally edit the Item document type are limited to Local IDs and Barcodes.

Chapter 2. Link Titles, Holdings, or Items

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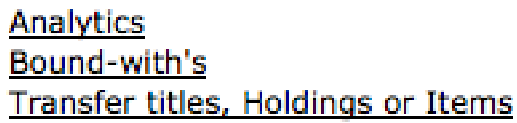
> 

On the Describe menu, the Link Titles, Holdings, or Items submenu provides access for users to create and modify analytics and bound-withs

Analytics

> 

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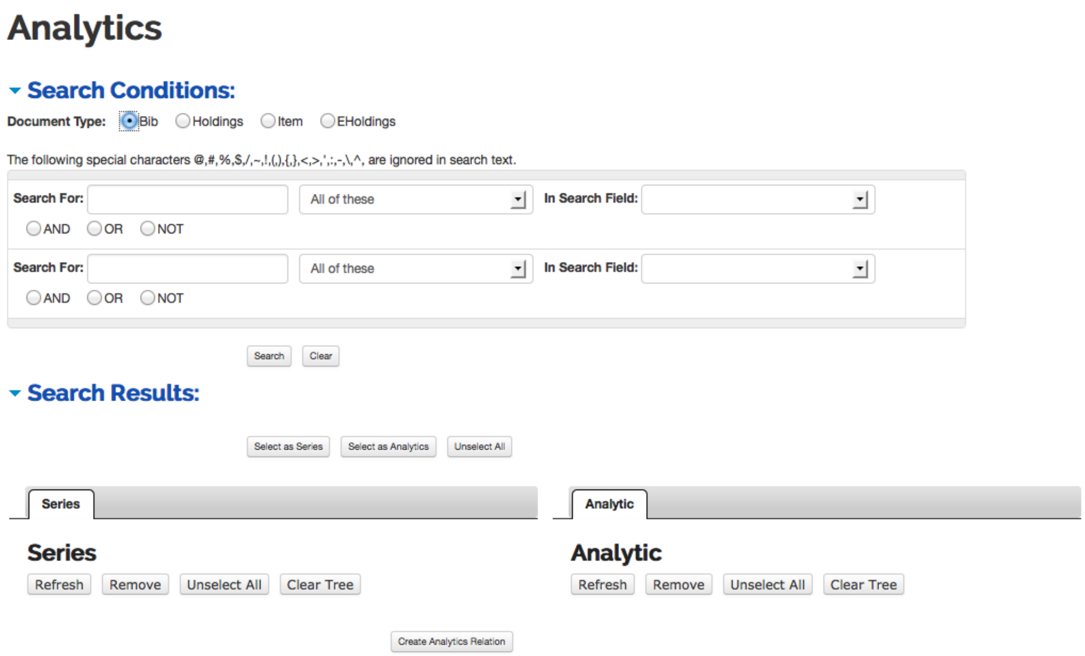
The **Analytics** interface can be used to create a link between the record for a monographic series and the records for individual works within the series. OLE accomplishes this by allowing you to link an item record to two different holdings records, one holdings record for the series, and the other for a title in the series. The purpose of this interface is to allow a user of your OPAC/discovery layer to locate an item within a series in your collection, and ascertain its status (“on shelf,” “checked out,” etc.) regardless of whether the user searches it by series or by the individual work in the series. Since OLE does not have its own OPAC/discovery layer, it is up to each OLE site to determine how to make the Analytics functionality work within the OPAC/discovery layer it has chosen to implement in conjunction with OLE.

Tip

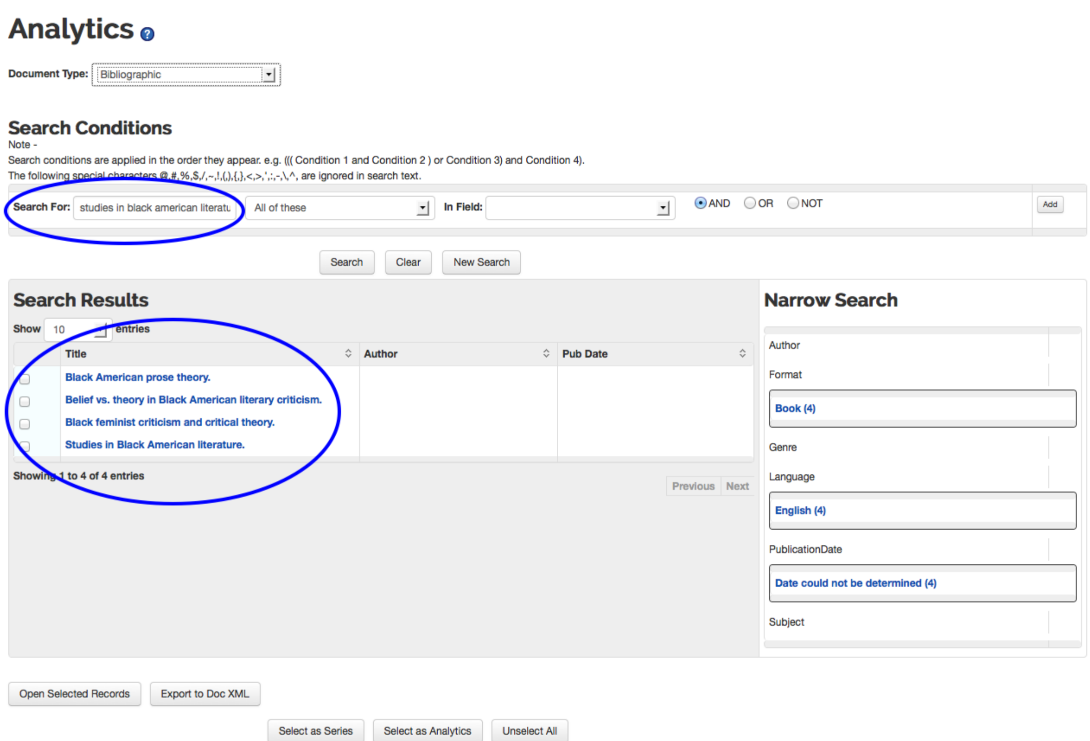
An Analytics relationship will always need to be set up manually by a library staff member.

Process Overview

1. Call up the **Analytics** interface.



2. Search and retrieve the bibliographic records for your series and the titles within it.

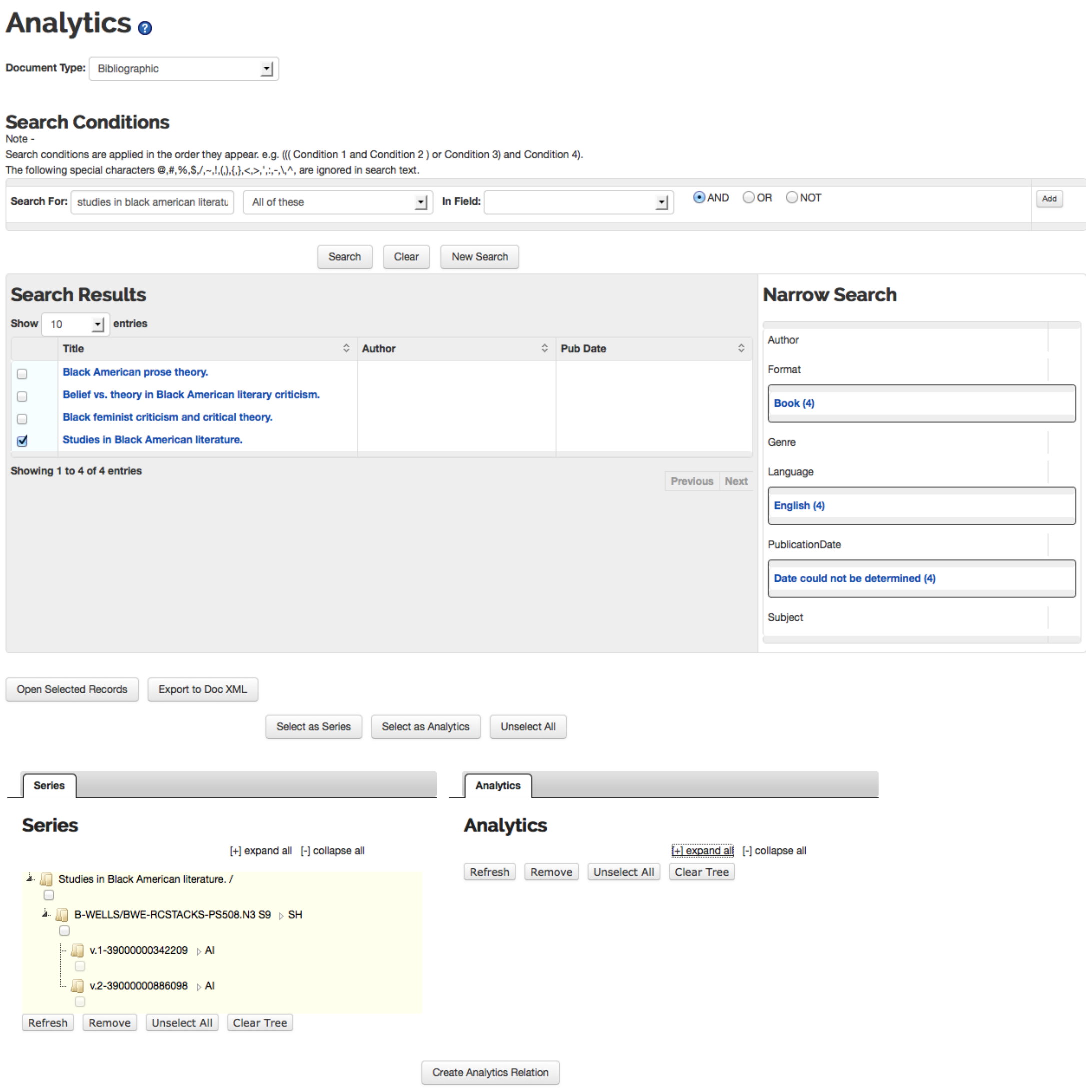


Tip

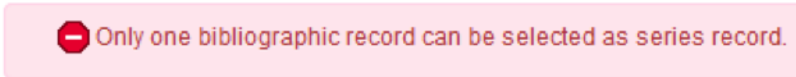
If you make sure that the series title exists in all of the records before you begin, you can retrieve them all with a single search.

3. Check the title for your **series** record, then click 

Your series will appear in the **Series** tree at the bottom left:



If you select more than one title and click **Select as Series**, you will receive an error message:

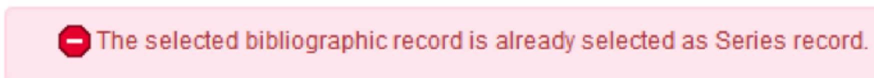


4. From your search results, select any and all of the records for the individual titles within the series for which you wish to establish an Analytics relationship, then click 

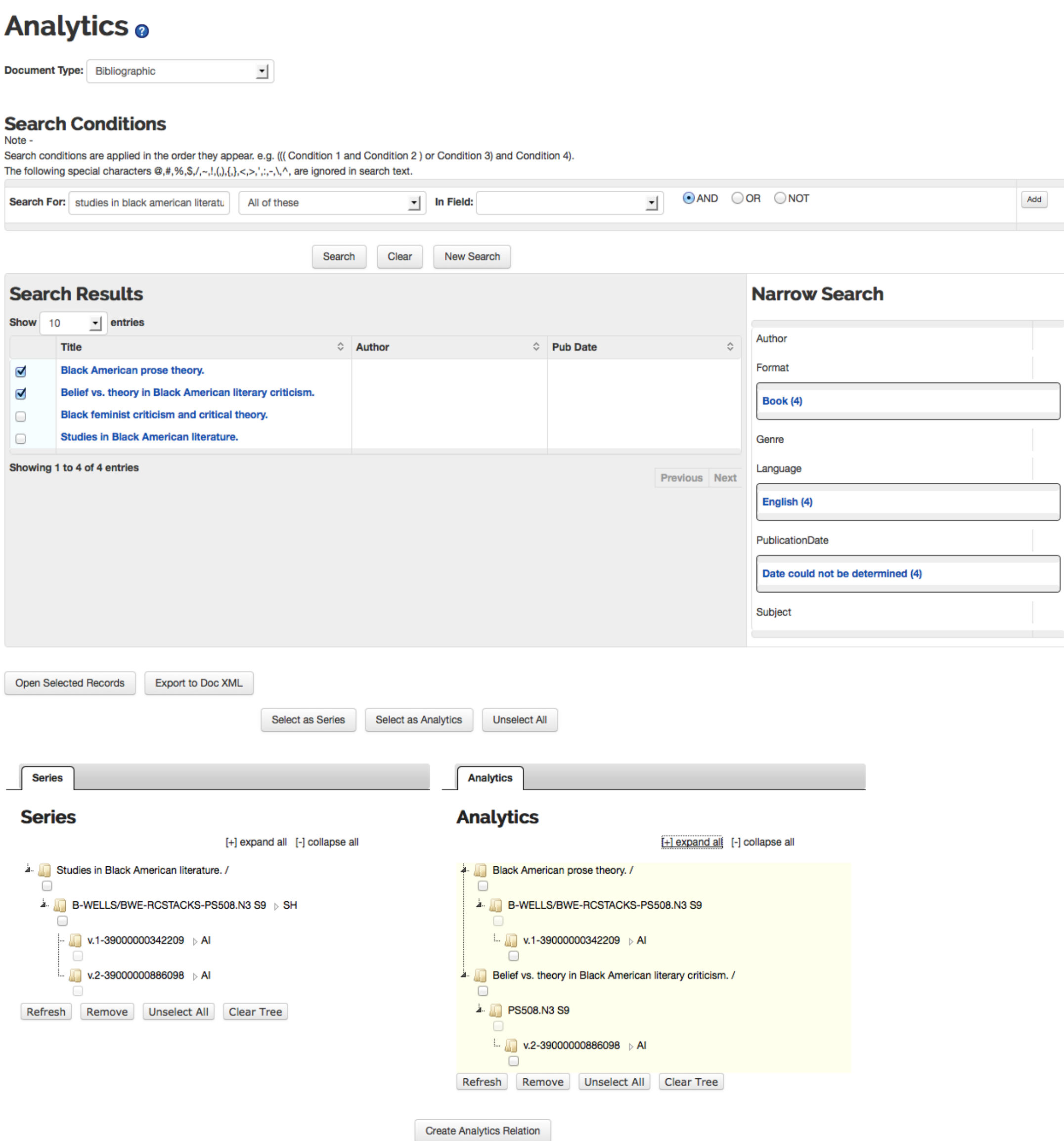
.

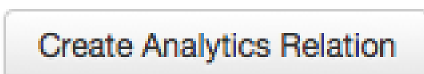
   ### Tip

   Remember to uncheck the record for your series title before clicking on **Select as Analytics**. If you fail to do so, you will receive an error message:

The records you have selected will now appear in the **Analytics** tree at the bottom right:



5. Check the **holdings** for your series record in the Series tree, and the **items** for the records in the Analytics tree, then click 

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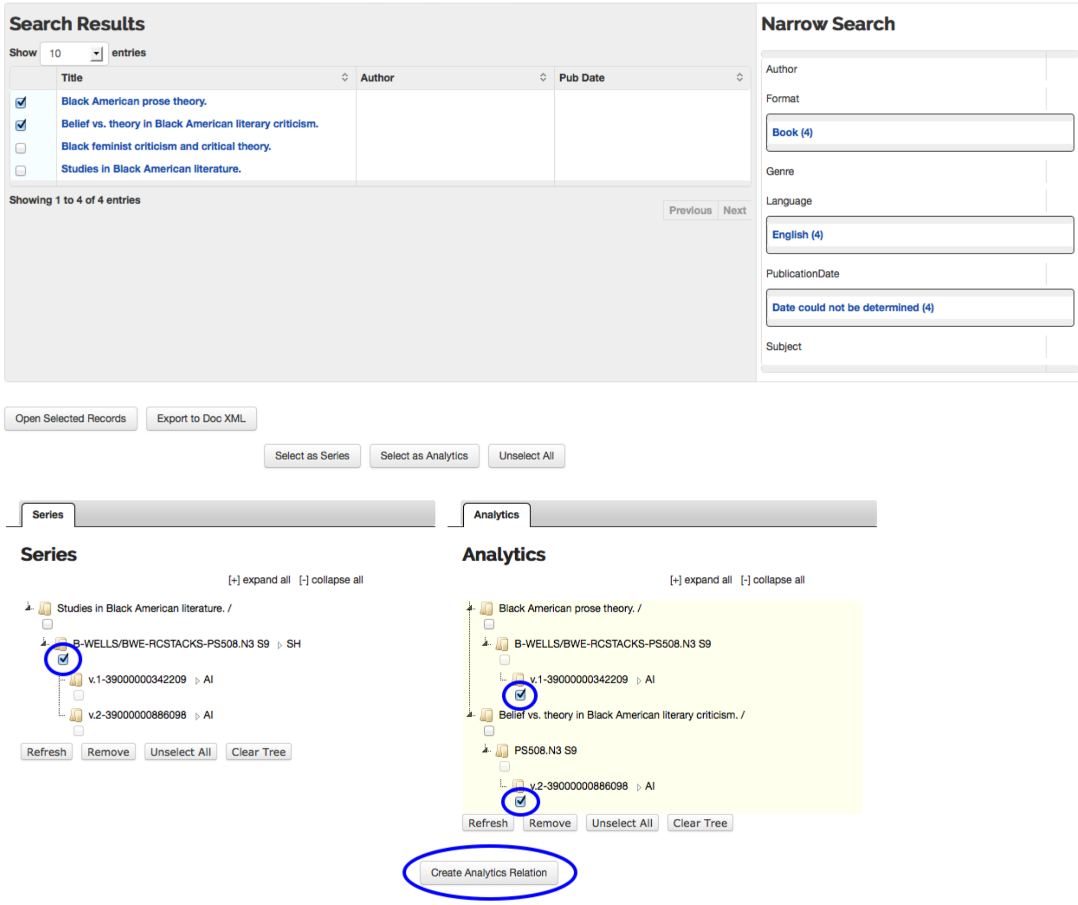
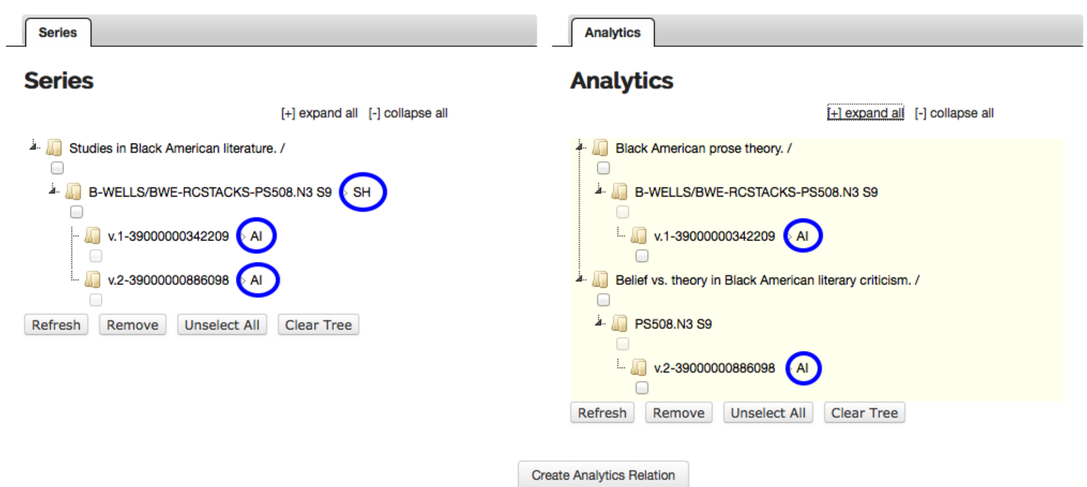
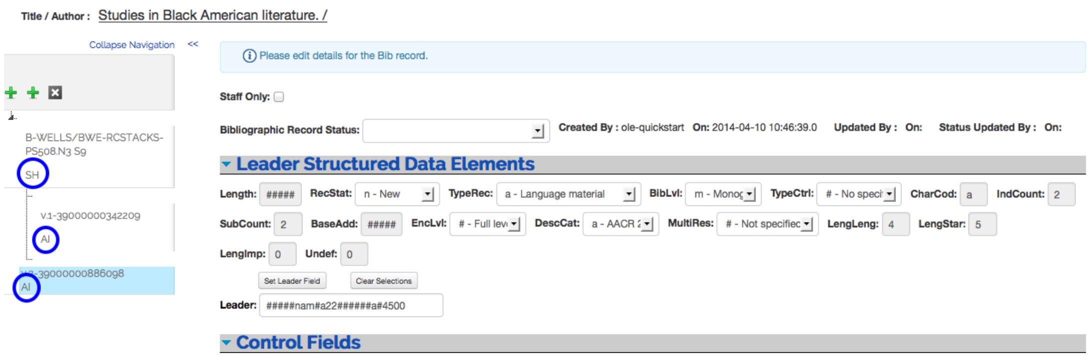


The Analytic items will now be linked to both the Series holdings record and the Analytics holdings records. Thus, they will now appear in both trees. The Series holdings will be identified by “SH” (Series Holdings) in the Series tree, and the Analytics items will be identified by “AI” (Analytics Item) in both trees:

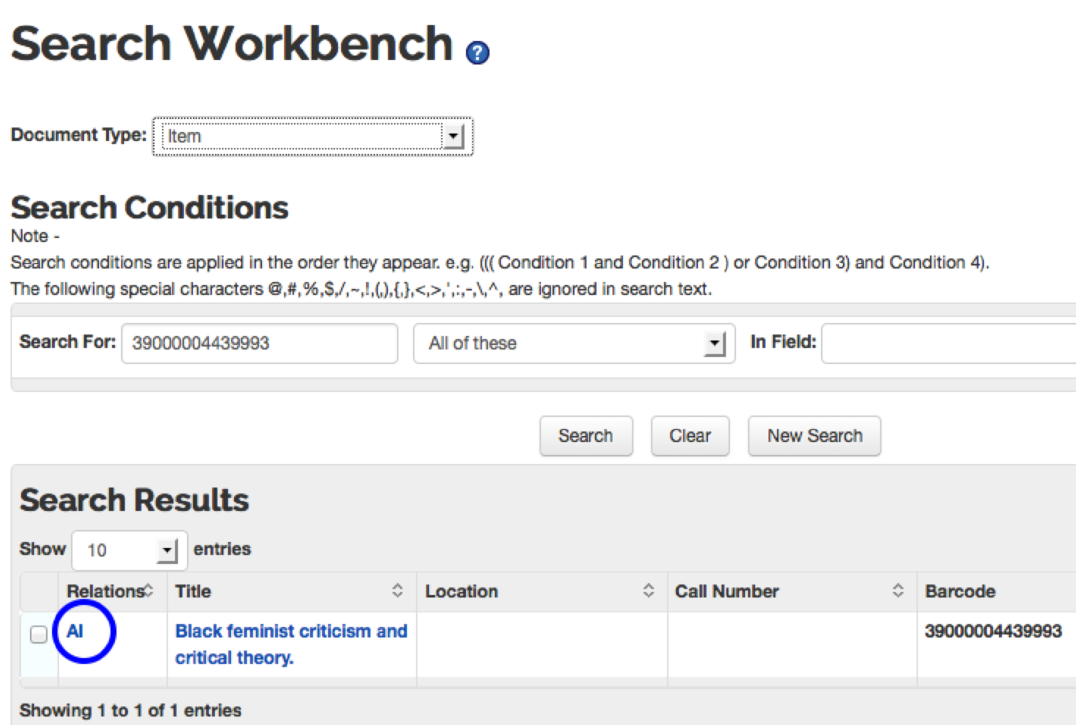


The “SH” and “AI” codes will also appear elsewhere in various places once an analytics relationship has been set up.

It will appear in the left pane navigation in individual record displays:



It will appear in the **Relations** column of Search Results lists in Search Workbench for searches of holdings or item records:



Adding a New Analytic Title to an Existing Series

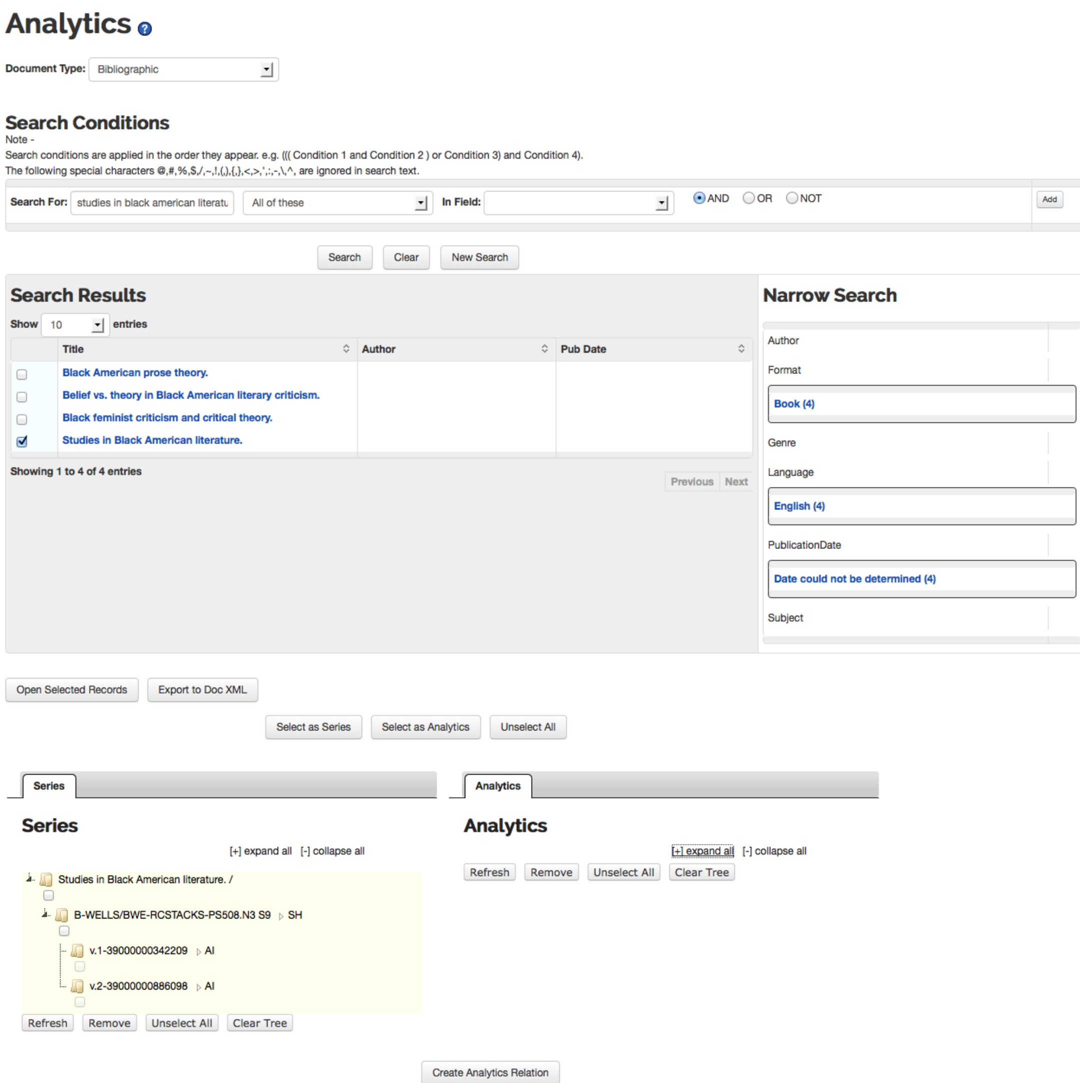
To add a new analytics title to an existing series:

1. Create or add a record for that title to the database.
2. Call up the **Analytics** interface.

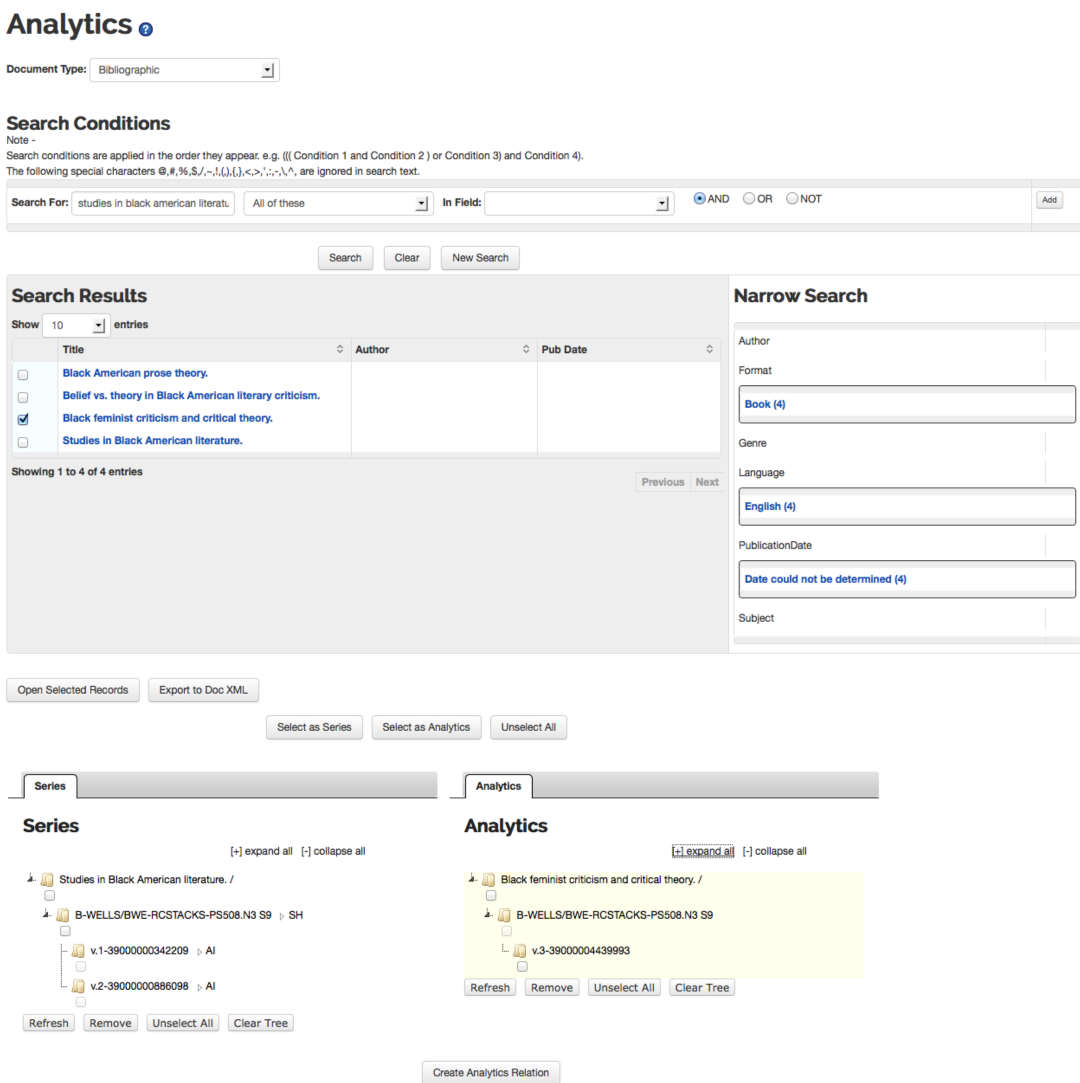
3. Search for the records in your series, including the new analytics title.

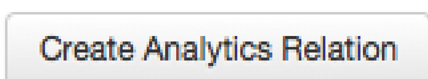
4. Select the record for the Series title, then click on 

   This will place the Series record in the **Series** tree at the lower left, and show the existing links between the Series holdings and Analytics items:



5. Click on the new Analytics record to place it in the **Analytics** tree at the lower right. Remember to uncheck the Series record first:



6. Check the record for the **holdings** in the Series tree, and the record for the **item** in the Analytics tree, then click 

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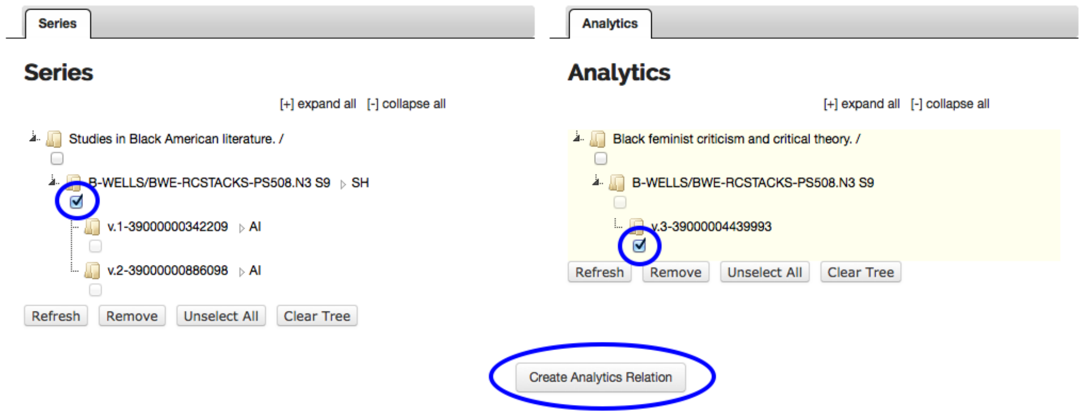
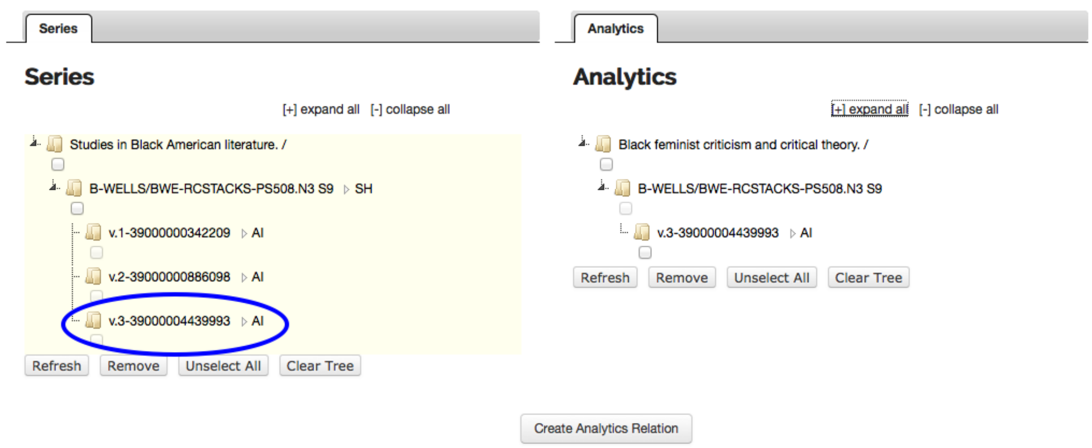


The item will now appear linked to the holdings in the **Series** tree, as well as remaining linked to the holdings in the **Analytics** tree:

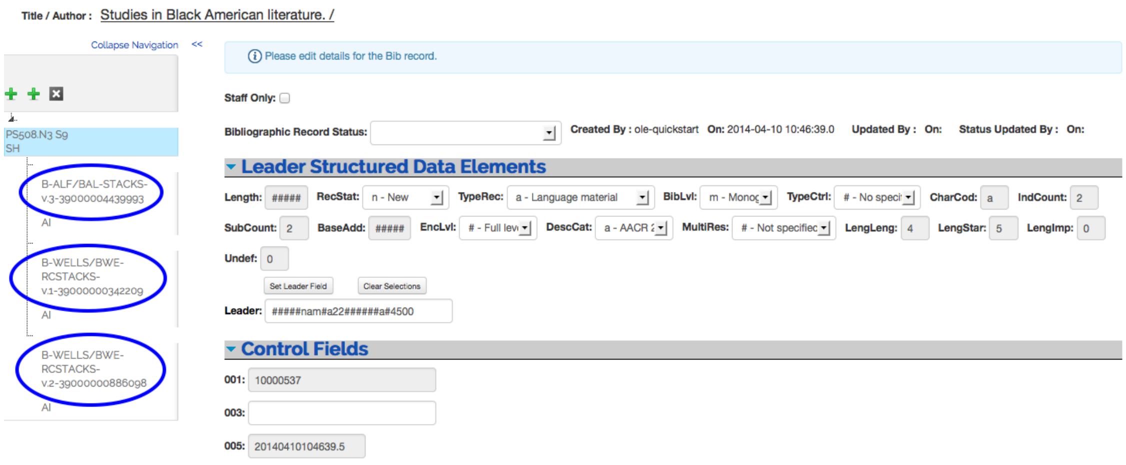


"Classed Together" vs. "Scattered" Series

The Analytics interface in OLE can be used either for series that are “classed together” (all volumes in the series have the same call number) or series that are “scattered” or “classed separately”(the volumes in the series have different call numbers).

To set up Analytics relationships for a classed together series, supply the call number for the series in the holdings record for the series as well as in the holdings records for the individual titles in the series, as shown in the above examples.

To set up Analytics relationships for a scattered series, do not supply a call number in the holdings record for either the series or the analytics titles. Instead, supply the call number for each volume in the series in the item record for that volume:



You can also set the shelving location in item records for a series shelved in multiple locations, regardless of whether it is a series classed together or a series classed separately.

Breaking an Analytics Relationship

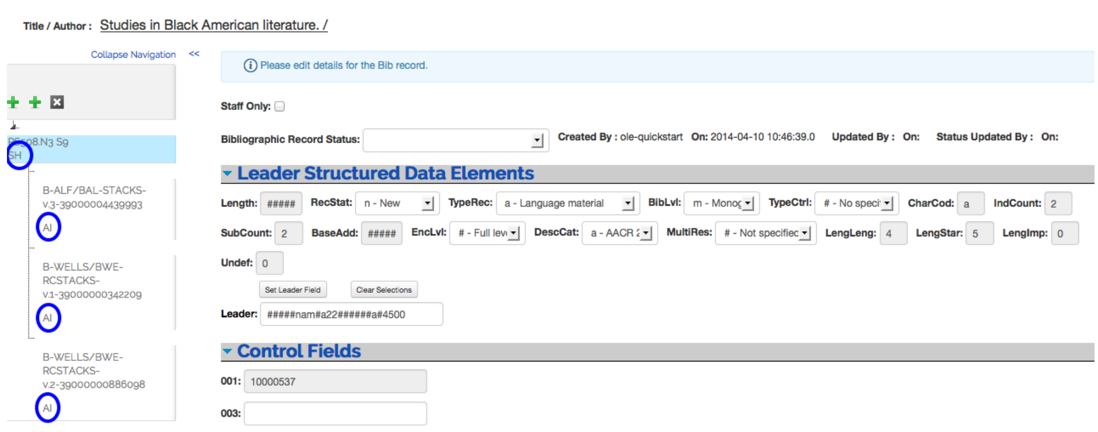
To break an Analytics relationship between a Series record and any or all of its Analytics records:

1. Open the **Analytics** interface.

2. Search for the records involved in the Analytics relationship you wish to break. You can search for either the entire series, or for one of the titles in the series.

3. From the Search Results list, click on the title of one of the records to display it. It does not matter if it is the record for the series, or a record for a title in the series.

4. In the left navigation pane, click on *either* “SH” or “AI” (it does not matter which you choose):



5. This will open up the Analytics Summary screen. Check the boxes of any items for which you wish to break the Analytics relationship, then click **Break Analytics Relation**:

Business Rules

- Only one record may be the “Series” holdings record in an analytics relationship; any number of records may be involved in the relationship as “Analytics” records.
- The same record cannot be both the “Series” record and an “Analytics” record within an Analytics relationship.

Bound-Withs

In special cases it is necessary to link a single OLE Instance (Holdings and Item records) to multiple bibliographic records to account for situations when titles with multiple bibliographic records (i.e., bibliographically unrelated works) are joined together in a single physical volume (i.e., are “bound-with” each other).

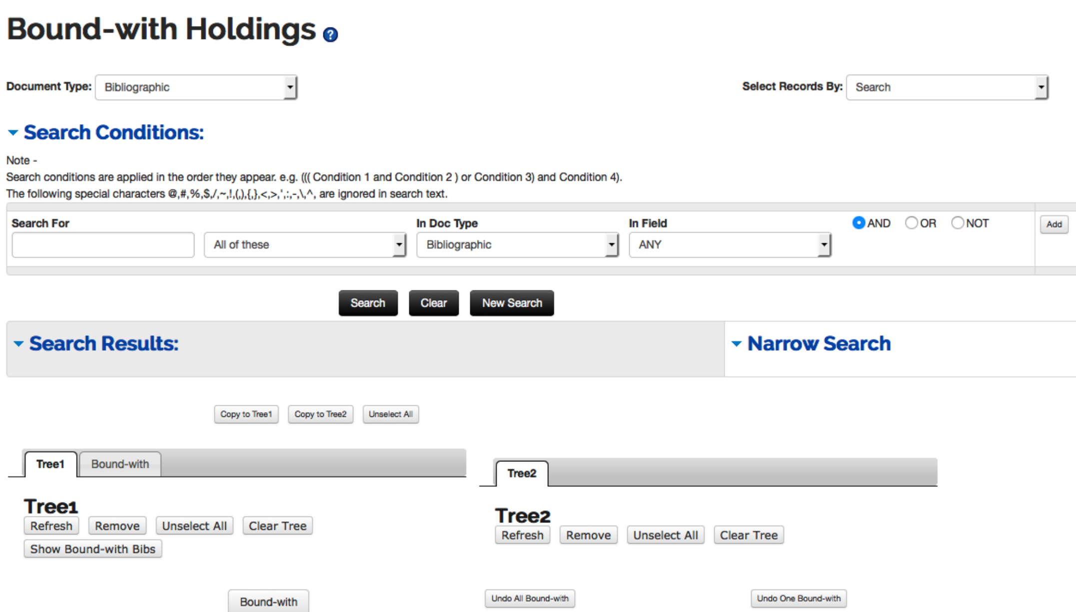
Depending on an OLE site’s cataloging policies, it would also be possible for two or more OLE Instances to share an Item record because of a bound-with situation, and also for one or more of those OLE Instances to have additional Item records attached because the library holds multiple copies of a work, some of which are not bound-withs.

Tip

Bound-withs will always need to be setup manually by a library staff member through this interface.

Process Overview

1. Call up the **Bound-with Instance** interface.



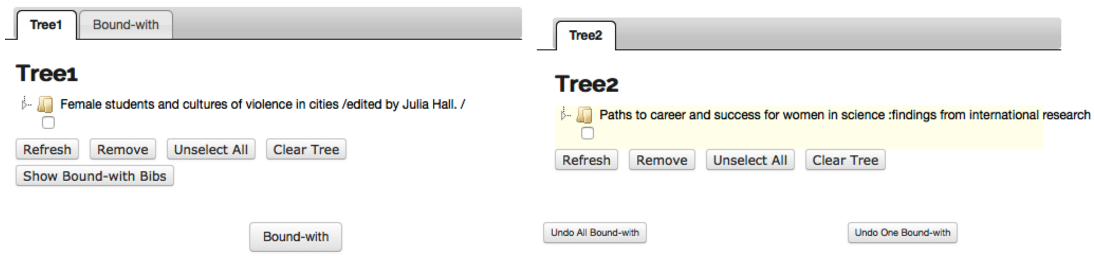
2. Search for the OLE Instance that will be shared by multiple bibliographic records. You may select a **Document Type** and search using Boolean operators as needed. Search results appear below the **Search Conditions** tab.

3. When the correct record is displayed, select it and click **Copy to Tree1**.

4. Search for the additional bibliographic records with which the OLE Instance will be shared (in some cases these may not exist. You will need to create the records prior to beginning the bound-with process).

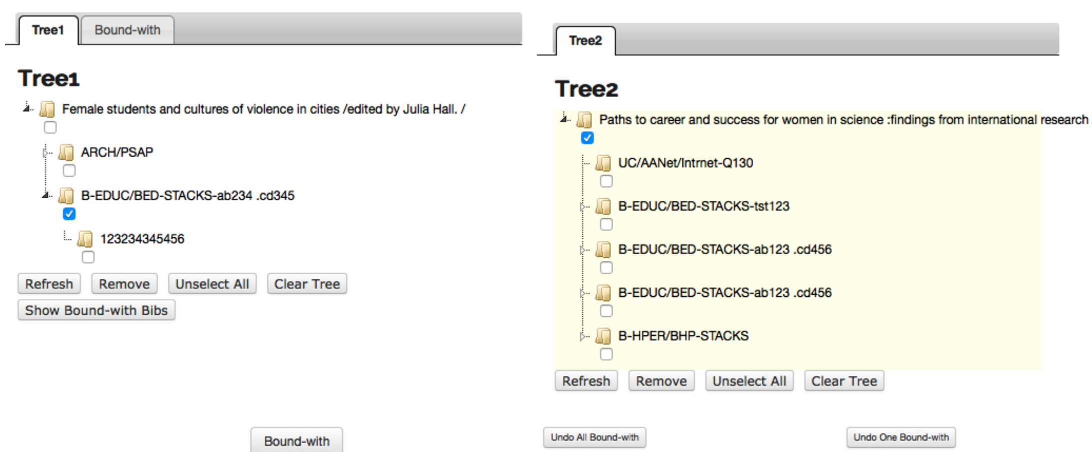
5. When the correct record is displayed, select it and click **Copy to Tree2**.

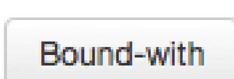
   Each Tree will show the bibliographic record. You may branch down to the Instance or item level by clicking the arrow next to the folder.



6. Select the holdings record for the holdings and item to be retained in Tree 1.

7. Select the bibliographic description to join the holdings record from Tree 2.



8. Click 

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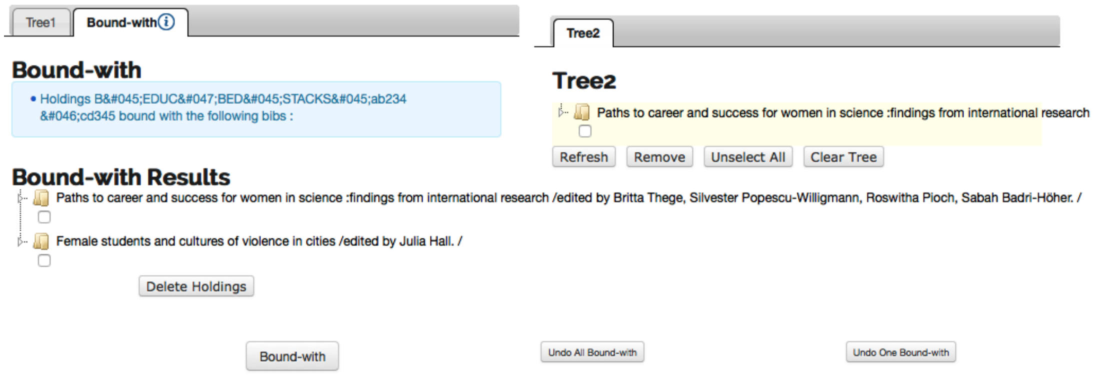
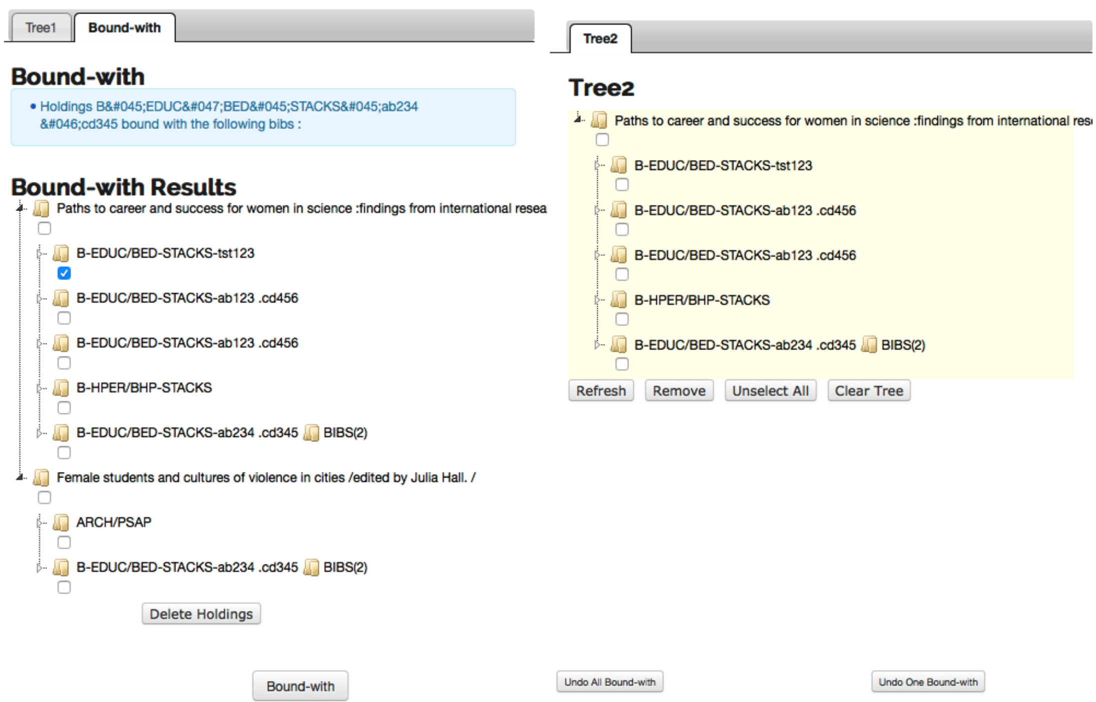
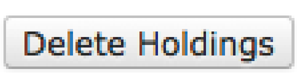


Since every bibliographic record must have at least one attached OLE Holdings, setting up a bound-with will frequently result in one or more existing OLE Holdings becoming redundant. You will need to delete the redundant OLE Holdings manually as part of the workflow. The items attached to these holdings will also be deleted.

9. Select the extraneous instances attached to the bibliographic descriptions.



Click 

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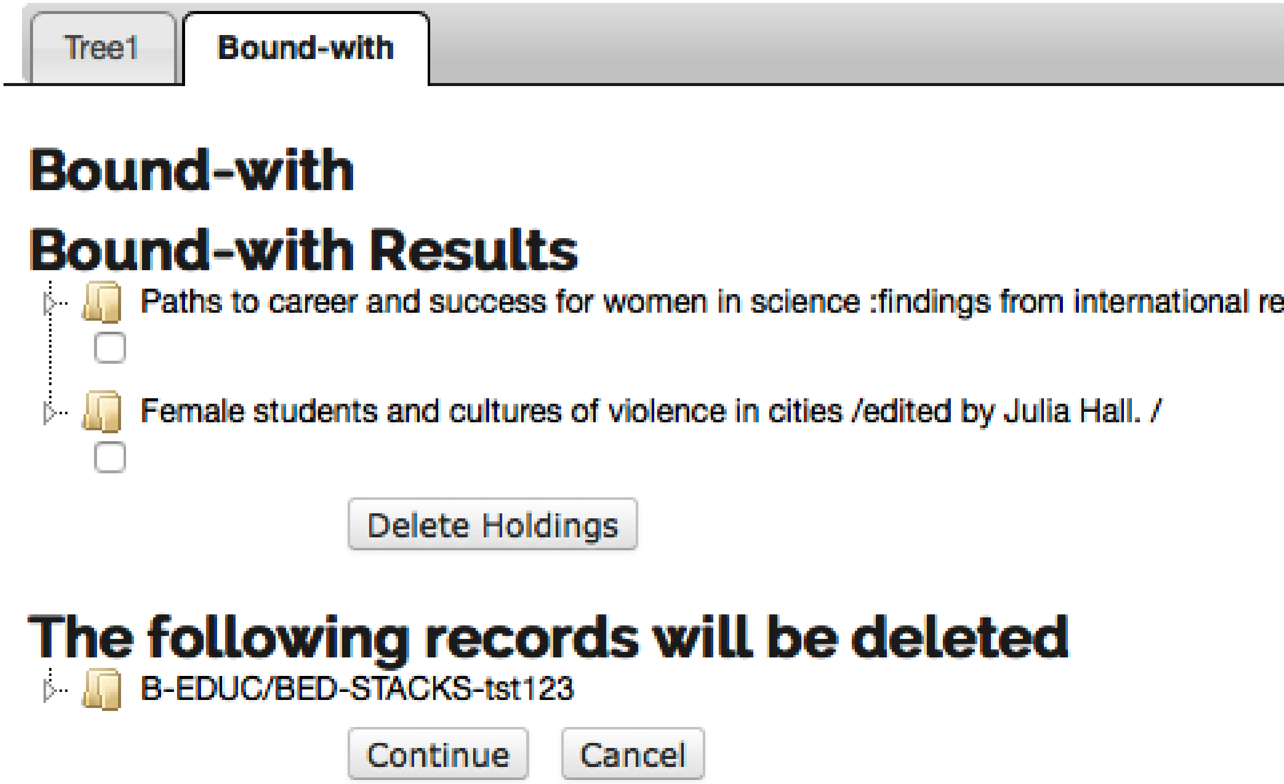
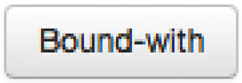
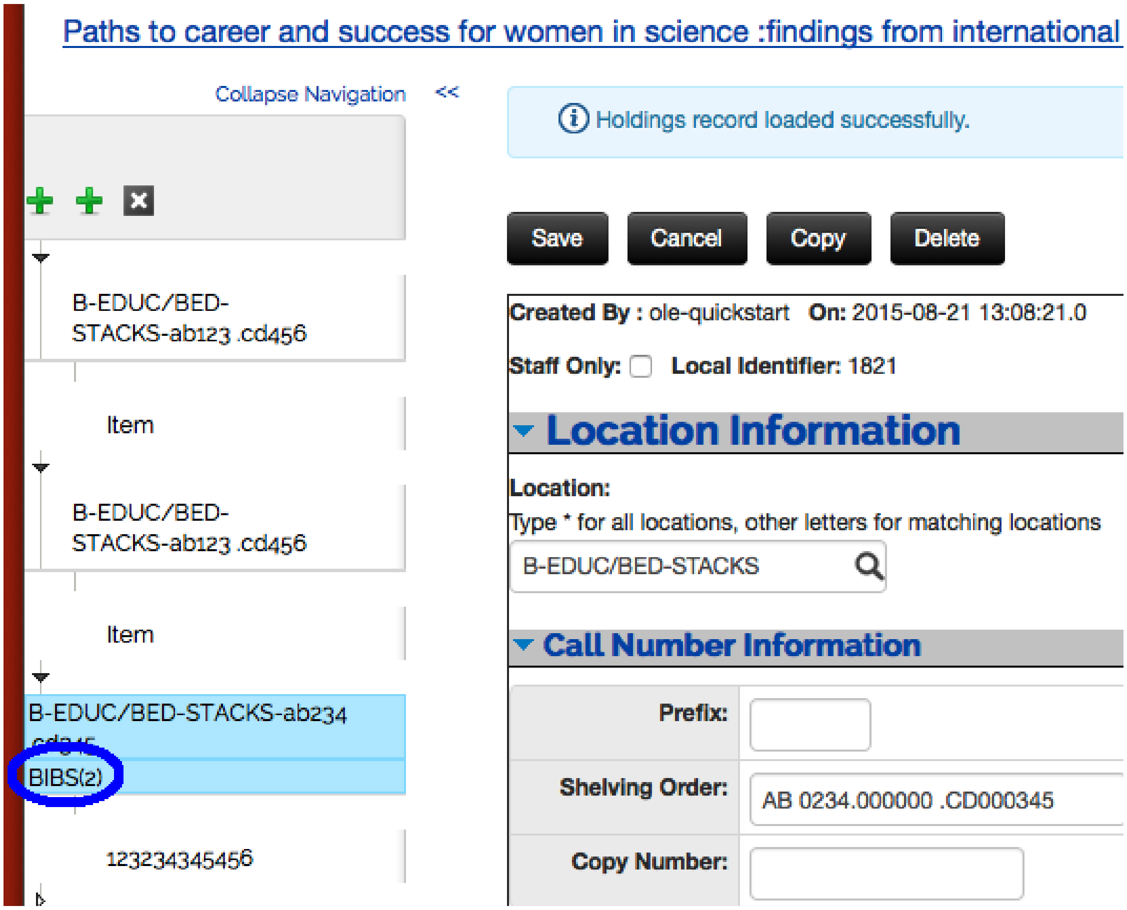
10. Click **Continue** to confirm the deletion.

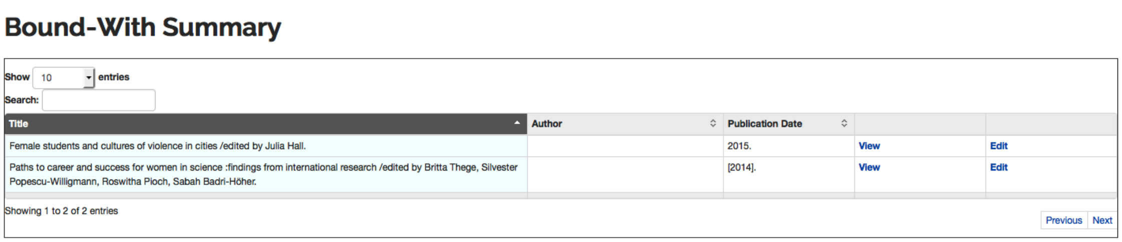




The “BIB(2)" code will appear in the left pane navigation in individual record displays:



Clicking on the "BIB(2)" code in the left pane navigation will bring up the **Bound-With Summary** page where users can view and edit the bibliographic records of each title.



Title	Author	Publication Date		
Female students and cultures of violence in cities /edited by Julia Hall.		2015.	View	Edit
Paths to career and success for women in science :findings from international research /edited by Britta Thege, Silvester Popescu-Willigmann, Roswitha Pioch, Sabah Badri-Höher.		[2014].	View	Edit

Business Rules

- A Bibliographic record is not required to have an OLE Instance, but it may have one, zero, or many OLE Instances.
- A Holdings record may have zero, one, or many Item records.
- An Item record must be linked to a Holdings record – if there are zero Holdings records, there must be zero Item records.
- A user must be authorized to perform the bound-with function in order to use it, and must be authorized to perform it for the appropriate work unit depending on local configuration options.

- All titles linked by the bound-with process will share the same item record, including the item record's associated call number, item ID, and locations.

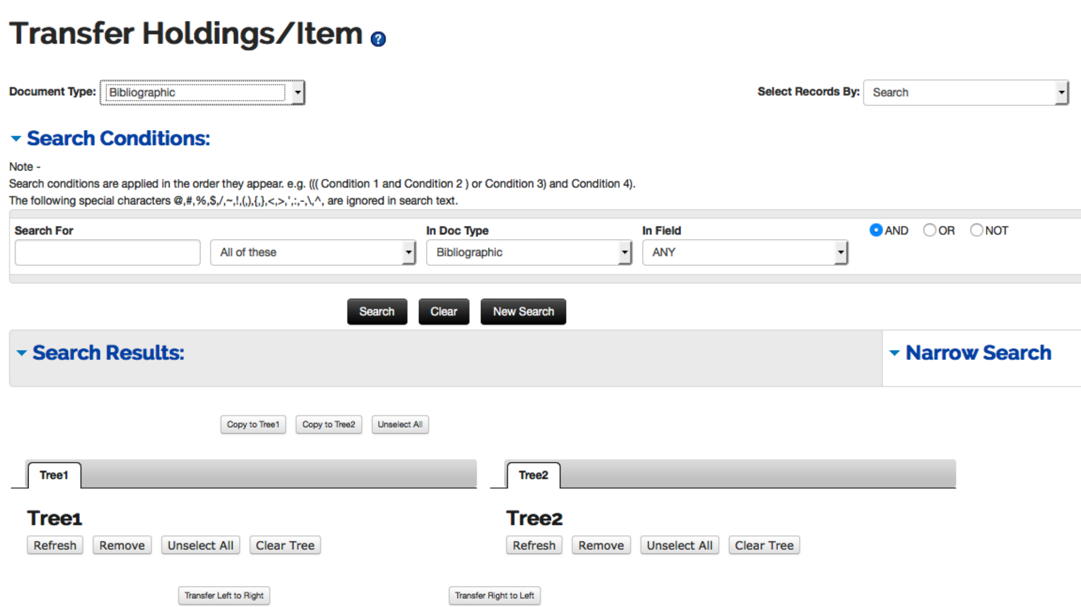
Transfer Item/Instance

Describe > Link Titles, Holdings or Items > Transfer titles, Holdings or Items > Transfer Holdings/Item

The Transfer Instance/Item interface allows OLE users to transfer Instance records from one bibliographic record to another and transfer Item record from one Instance to another.

Process Overview

1. Call up the **Transfer Instance/Item** interface.

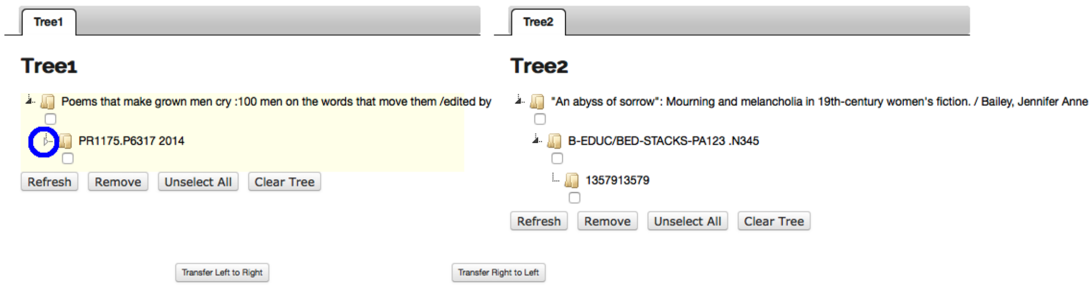


2. Search for the record that you wish to transfer. You may select a **Document Type** and search using Boolean operators as needed. Search results appear below the **Search Conditions** tab.
3. When the correct record is displayed, select it and click **Copy to Tree1**.
4. Search for the additional bibliographic records with which the OLE Instance or Item will be transferred.
5. When the correct record is displayed, select it and click **Copy to Tree2**.

Tip

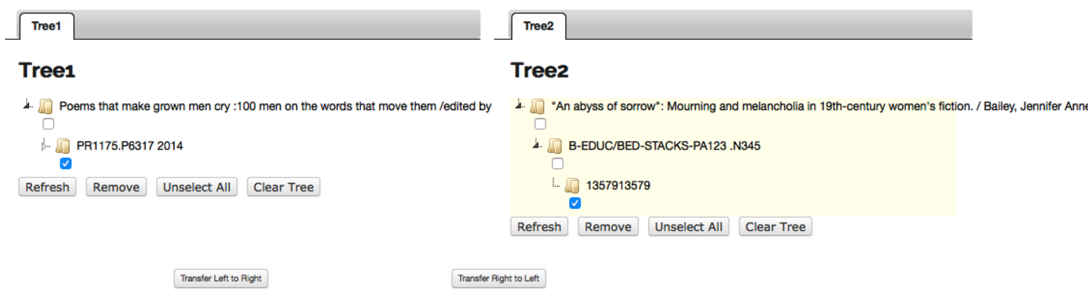
Click **View** to confirm the correct record.

6. Each Tree will show the bibliographic record. You may branch down to the Instance or item level by clicking the arrow next to the folder.

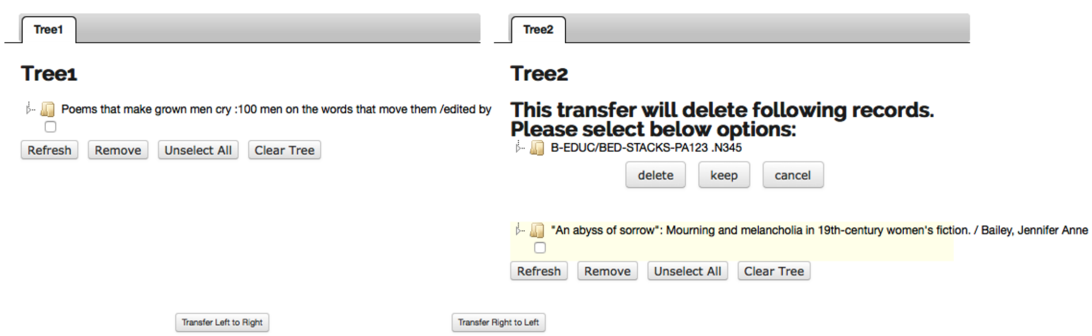


7. Check the box to specify what level you wish to perform the transfer on.

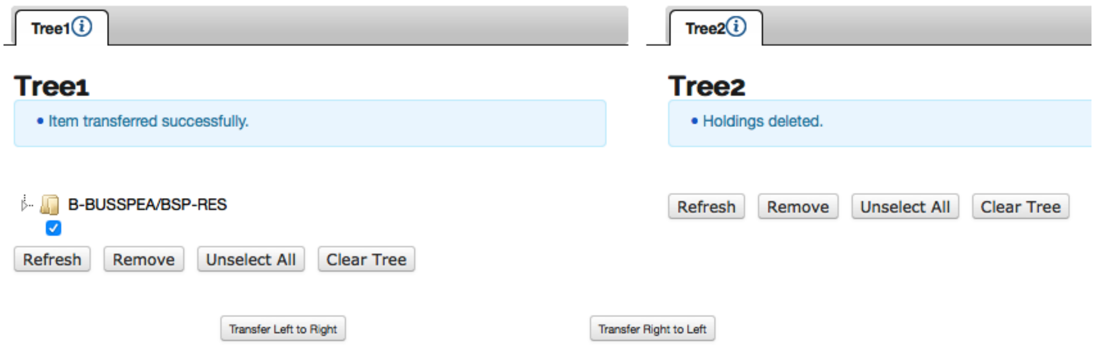
8. Click the appropriate button to transfer the Instance or Item from the left to the right or vice versa. In this example, the Instance record in Tree 2 is selected and will be transferred Right to Left to the checked Bibliographic description in Tree 1.



9. If there is only one item or holdings, OLE will delete the records. Click **Delete** to confirm this and to continue with the transfer.



10. OLE will provide a confirmation message. Click **Refresh** in **Tree 1** to see the transferred Holdings or Item record.



Business Rules

- An OLE Instance must have one Item record and may have many Item records.

  ### Note

  This rule is under review for future releases.

- An Item record can only be transferred to an OLE Instance.
- If the transfer of an Item record would result in an OLE Instance with no Item records, that OLE Instance will be deleted.
- An OLE Instance must have at least one associated Bibliographic Description. One OLE Instance may be associated with many Bibliographic Descriptions (to account for “bound-withs”).
- A Bibliographic Description must have at least one OLE Instance and may have many OLE Instances.
- An OLE Instance may only be transferred to a Bibliographic Description.
- If the transfer of an OLE Instance would result in a Bibliographic Description with no OLE Instance, that Bibliographic Description will be deleted.
- A user may not transfer an OLE Instance to or from Bibliographic Descriptions that the user’s work unit does not “own”. A user may not transfer Item records to or from OLE Instances that the user’s work unit does not own.

  ### Note

  Work units are being defined for a future release.

Chapter 3. Single Record Export/Import

On the Describe menu, the Link Titles, Holdings, or Items submenu provides access for users to create and modify analytics and bound-withs

Single Record Import

This interface provides the ability to import a single Bibliographic Record or a file of Bibliographic Records one at a time into the OLE database. This allows catalogers to download records from outside sources such as OCLC. The import may be to add a new title, in which case, a new OLE holdings record and item record will also be created, or to replace an existing Bibliographic Description from a different source. If the Bibliographic Description is replacing another, no OLE Instance will be created. If you need to add an additional OLE Instance or Item or modify an existing one, you will need to do so through the editor.

You will be able to edit both the Bibliographic Description being imported and any OLE Instance(s) linked to it during the import process. Once the import process has been completed, only those fields designated as “protected from overlay” will remain from the original Bibliographic Description when replacing an existing bibliographic description. Linkages to purchase orders, circulation records, etc. will also be unaffected.

Note

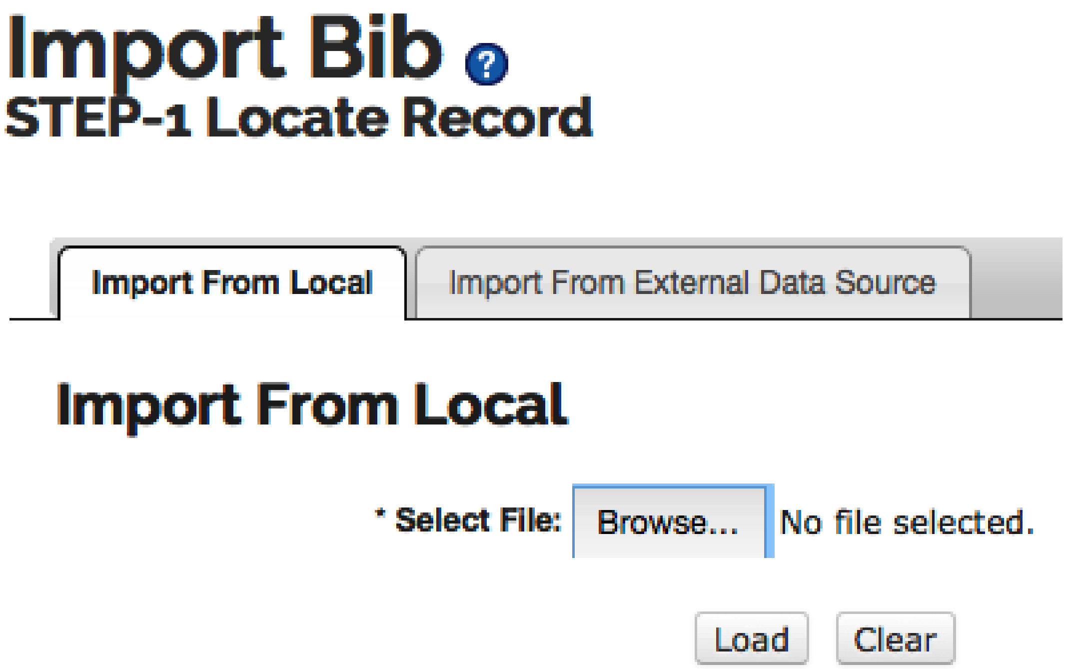
Import Bib is not intended for batch imports.

For more information about importing batch records, see the Batch Processes section of the *OLE Guide to System Administration Functions.* This and other OLE user guides are available for download from OLE Documentation Portal.

Process Overview

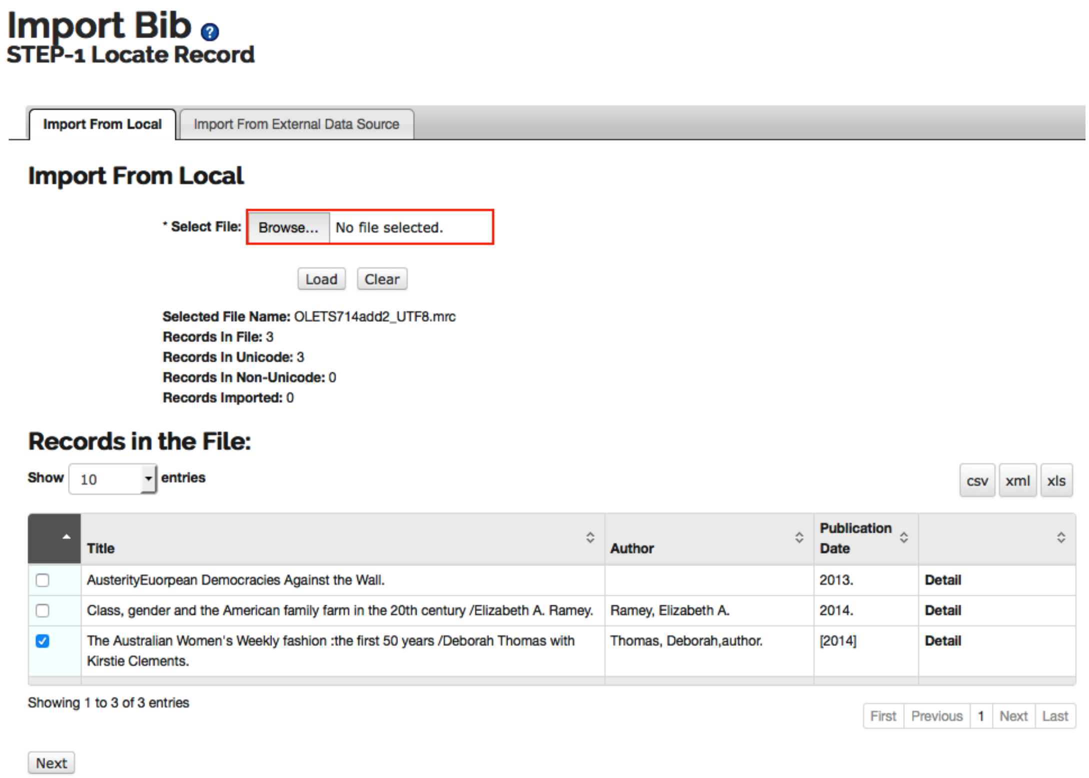
Import from Local to Create a New Bibliographic Record

1. Call up the **Import Bib** interface.



2. Click **browse** to search for the file from your local machine.
3. Click .

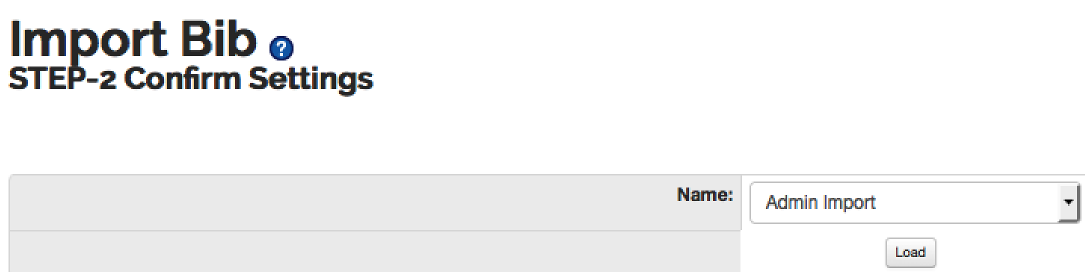
   Records in the File will contain the records loaded.
4. Click **Detail** to view the MARC record.
5. Select the record you wish to load and click .



6. Confirm the Settings by selecting a **Name** from the drop down list. This will set the User Preferences.

   ### Note

   To learn more about creating and modifying User Preferences, see information about Bib Import Preferences under the Batch Process Profile in the *OLE Guide to System Administration Functions*.

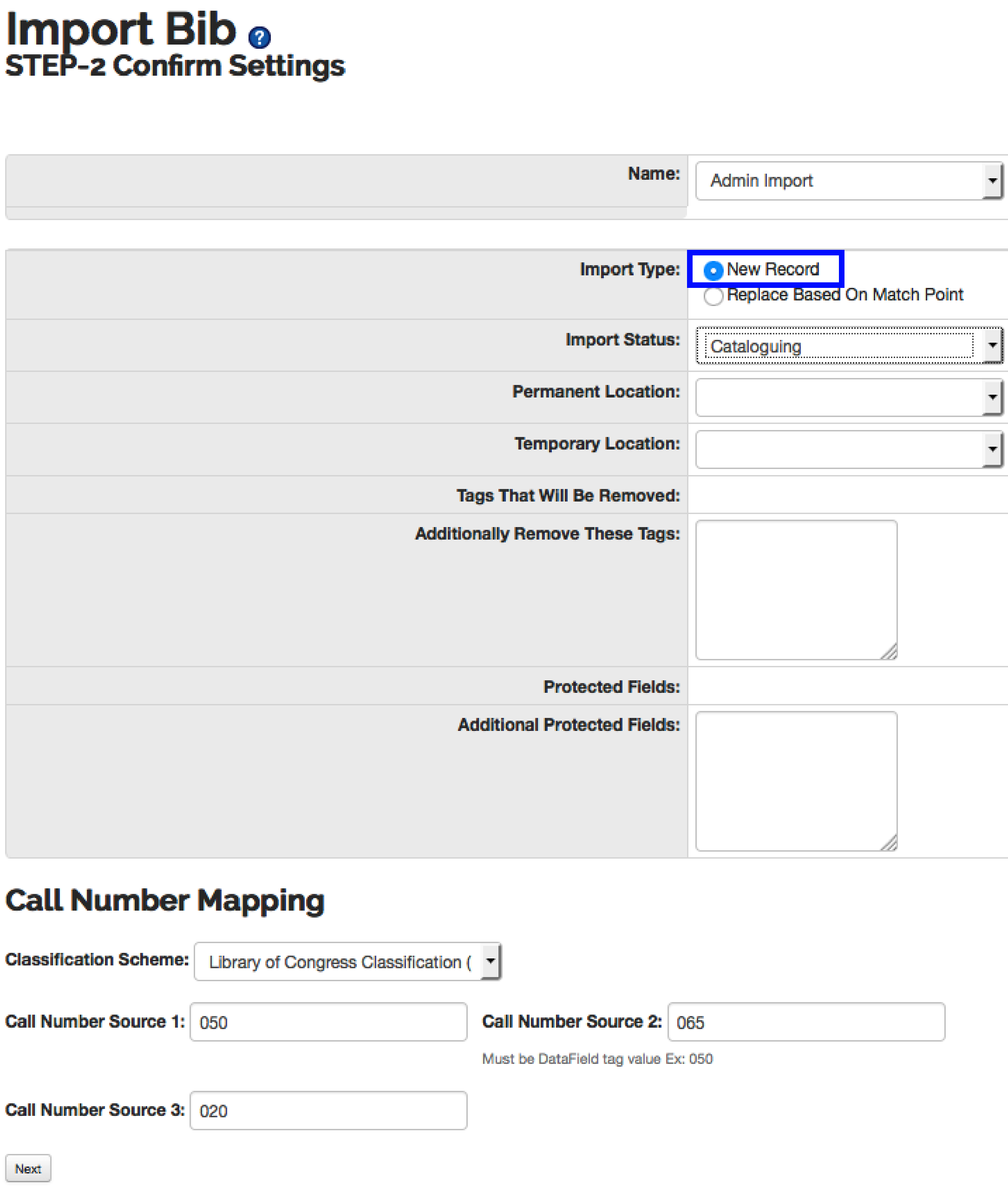
   Click 
   .

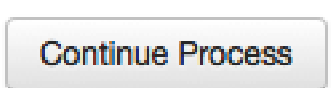
7. Choose "New Record" as the **Import Type**.

8. Select the **Import Status** and **Permanent Location** information from the drop down lists.

9. Enter any additional tags to remove and/or fields to protect.

10.Choose the **Classification Scheme** and modify the **Call Number Source** as necessary.



11. Click 

.

12.You may edit the incoming Bibliographic Record as needed when it is displayed. Click **Continue Process** when you are finished editing the Bibliographic Record.

Note

For more information about record editors, see Editors

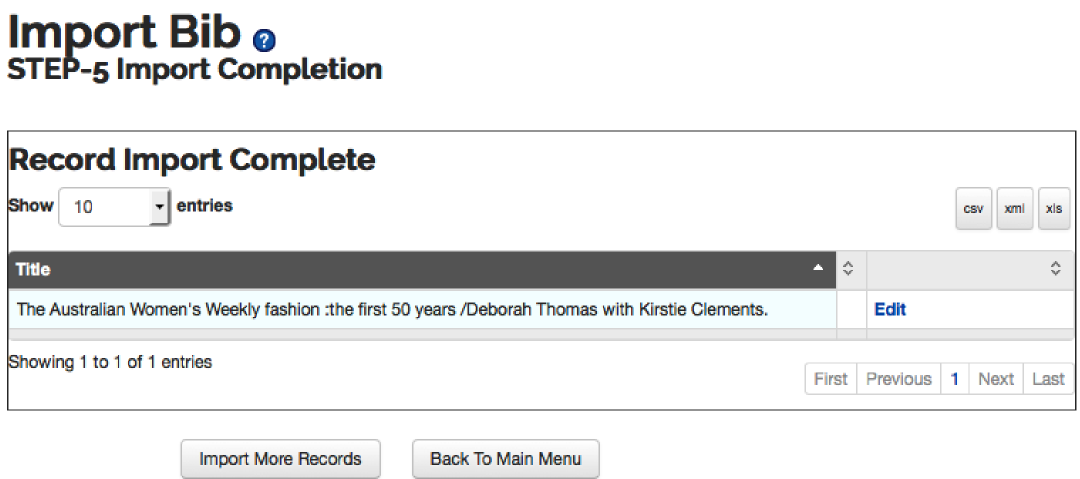
13. You may enter or modify information on the OLE Holdings as appropriate and click **Continue Process**.

14. You may enter or modify information on the OLE Item as appropriate and click **Save**. Both the Item Type and Item Status fields must have values chosen from the drop-down lists.

Note

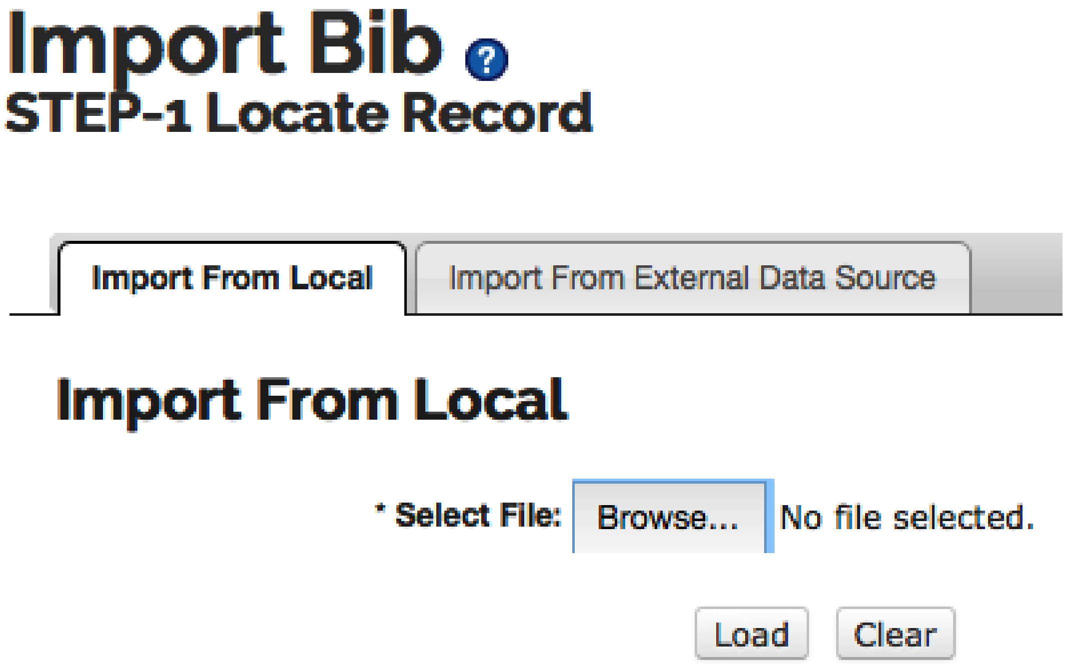
For more information about the Instance Editors, see the Instance Editor

15. On the **Import Completion** screen, you may choose to import more records or return to the main menu. You may also continue to modify the bibliographic, holding and item records by clicking **Edit**.



Import from Local to Overlay an Existing Bibliographic Record

1. Call up the **Import Bib** interface.



2. Click **browse** (or **Choose File** depending on your browser) to search for the file from your local machine.

3. Click 

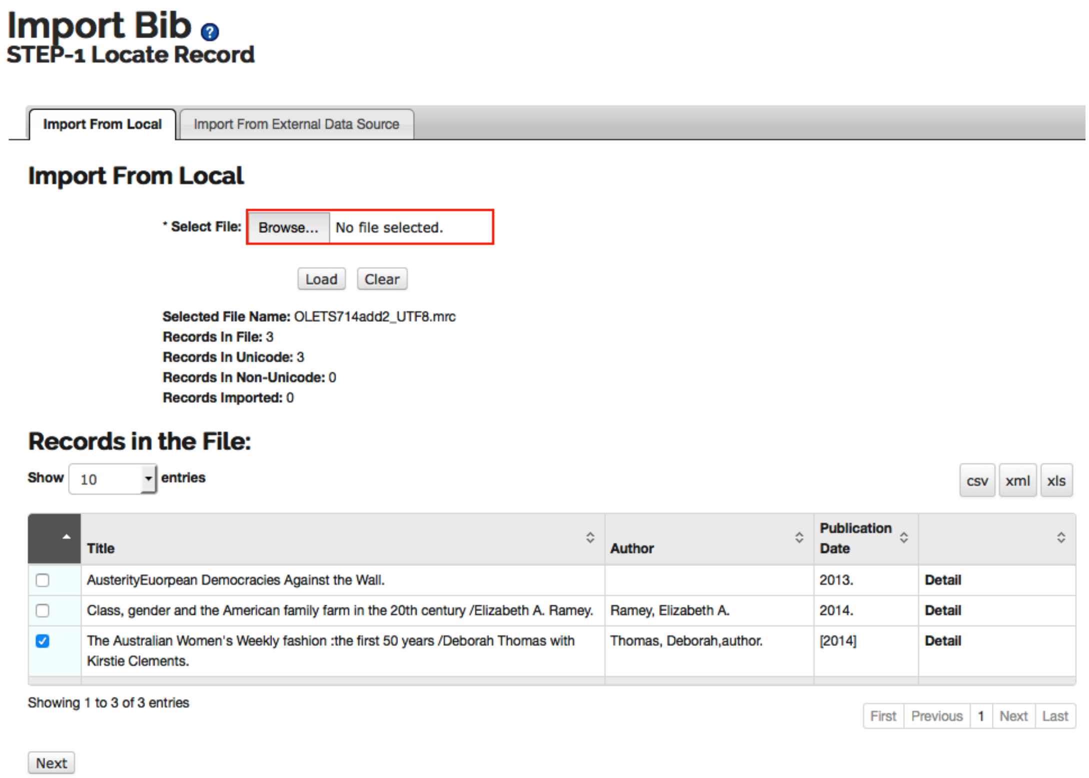
.

   Records in the File will contain the records loaded.

4. Click **Detail** to view the MARC record.

5. Select the record you wish to load or overlay and click 

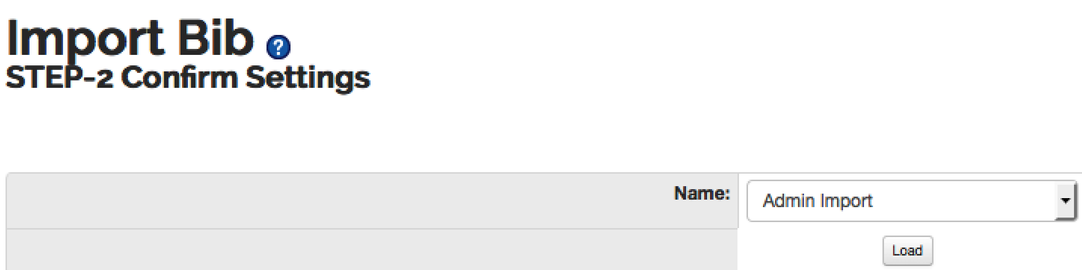
.

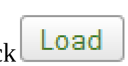


6. Confirm the Settings by selecting a **Name** from the drop down list. This will set the User Preferences.

   ## Note

   To learn more about creating and modifying User Preferences, see information about Bib Import Preferences under the Batch Process Profile in the *>OLE Guide to System Administration Functions.*

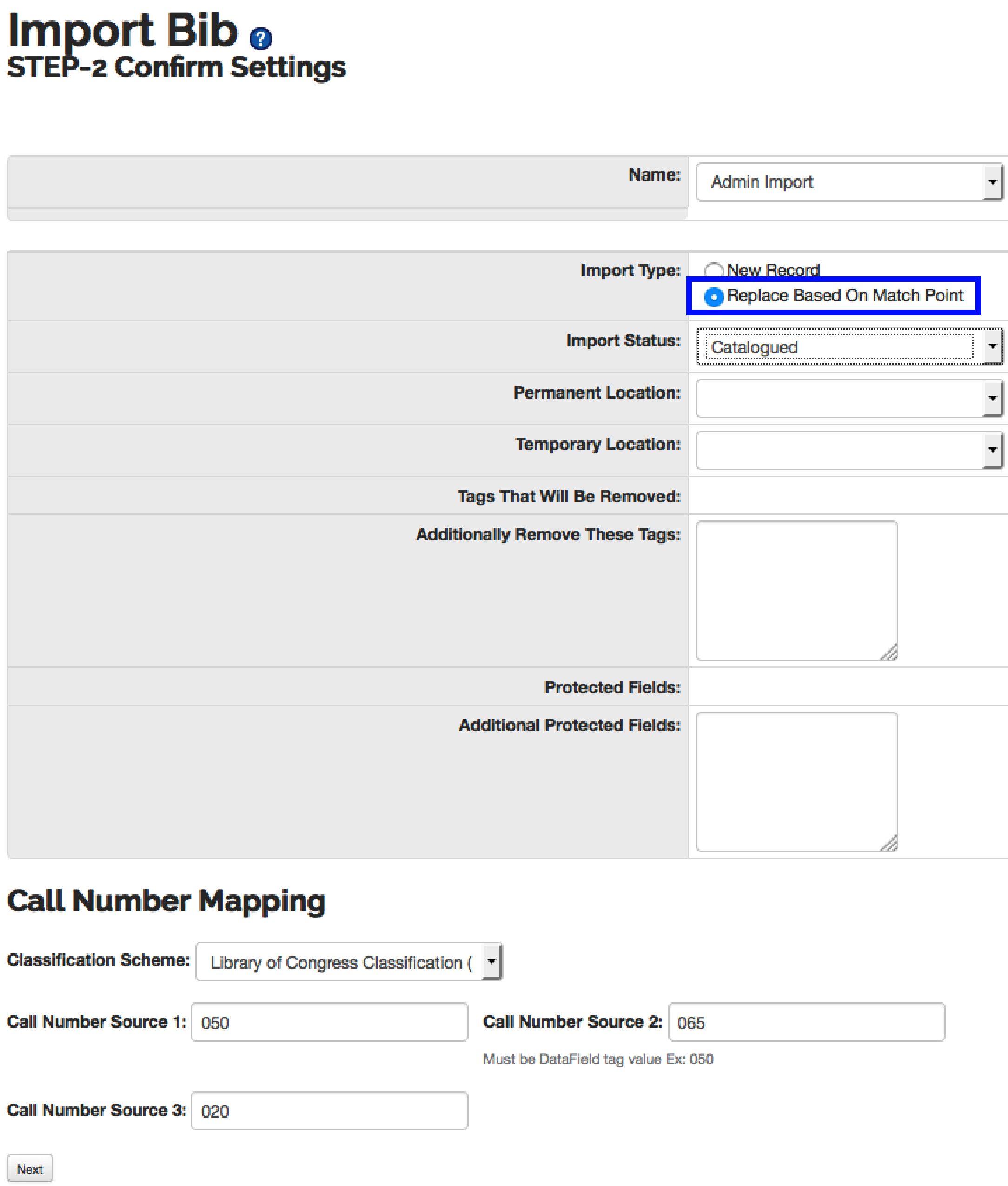


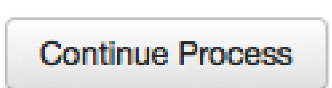
   Click 
.

7. Choose "Based on Match Point" as the **Import Type**.

8. You may change the **Import Status**, **Permanent Location**, **Classification Scheme** and/or modify the **Call Number Source**, or you may leave any of these unchanged to retain the settings on the existing record to be overlaid.

9. Enter any additional tags to remove and/or fields to protect.



10. Click 

.

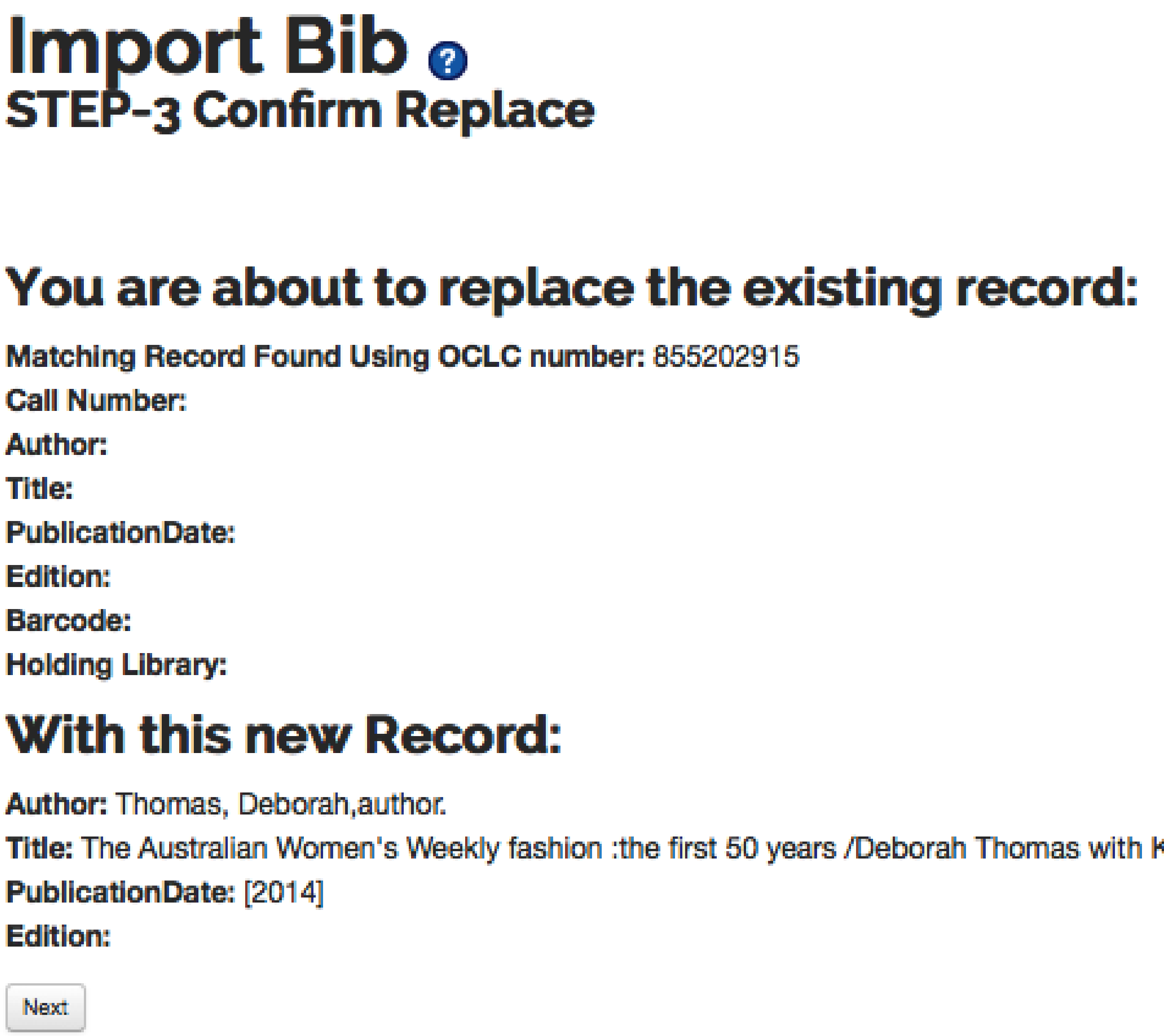
Note

If OLE cannot find the match point to perform an overlay, a new record will be created. Match points can be set via the User Interface.

Note

To learn more about creating and modifying User Preferences, see information about Bib Import Preferences under the Batch Process Profile in the *OLE Guide to System Administration Functions.*

11. If an existing record is found from the match point, you will see a confirmation screen with information about both the existing bibliographic record (to be overlaid) and the incoming bibliographic record:



12. If no bibliographic record is found via the match point, the screen will indicate that a new bibliographic record will be created. Click **Next** to continue the process.

13. You may edit the incoming Bibliographic Record as needed when it is displayed. Click **Submit** to save the bibliographic record.

Note

For more information about record editors, see Editors

14. In order to edit the Holdings and Item record(s) attached to the overlaid record, you will need to use the **Instance Editor**. These records cannot be edited during the import process when existing records are overlaid.

Import from External Data Source

This interface is here to show the possibility for institutions to import bibliographic records through a Z39.50 protocol. Because of licensing restrictions, each institution will have to implement this feature themselves. For implementation documentation see Searching External Datasources with Z39.50.

Business Rules

- Imported MARC bibliographic records must be in UTF8 format.
- Imported MARC bibliographic records must be in a file with the file extension ".mrc"
- A Bibliographic record may have zero, one, or many OLE Instances.
- An OLE Instance cannot exist without being linked to a Bibliographic record.
- An OLE Instance must have one Holdings record, but it cannot have more than one Holdings record.
- A Holdings record may have zero, one, or many Item records.
- An Item record must be linked to a Holdings record. If there are zero Holdings records, there must be zero Item records.
- New Bibliographical records created via "Single Bib Import" will by default have one Holdings record with one Item Record created and attached to the Bibliographic record upon import.
- Any Holdings or Item records attached to an existing Bibliographic record replaced via "Single Bib Import" will not be affected by the import process.
- Linkages to purchase orders, circulation records, etc. will not be affected by the import process.

Chapter 4. Cataloging Maintenance Documents

Maintenance > Cataloging Admin >

Bibliographic Record Status
Bib Overlay Protected Field
Bib Import Preference
Call Number Type
Extent of Ownership Type
Item Availability Status
Item Type
Receipt Status
Statistical Search Codes

Bibliographic and Instance attribute maintenance e-docs are available via the Cataloging submenu on the **Rice 2** menu tab.

Bibliographic Record Status

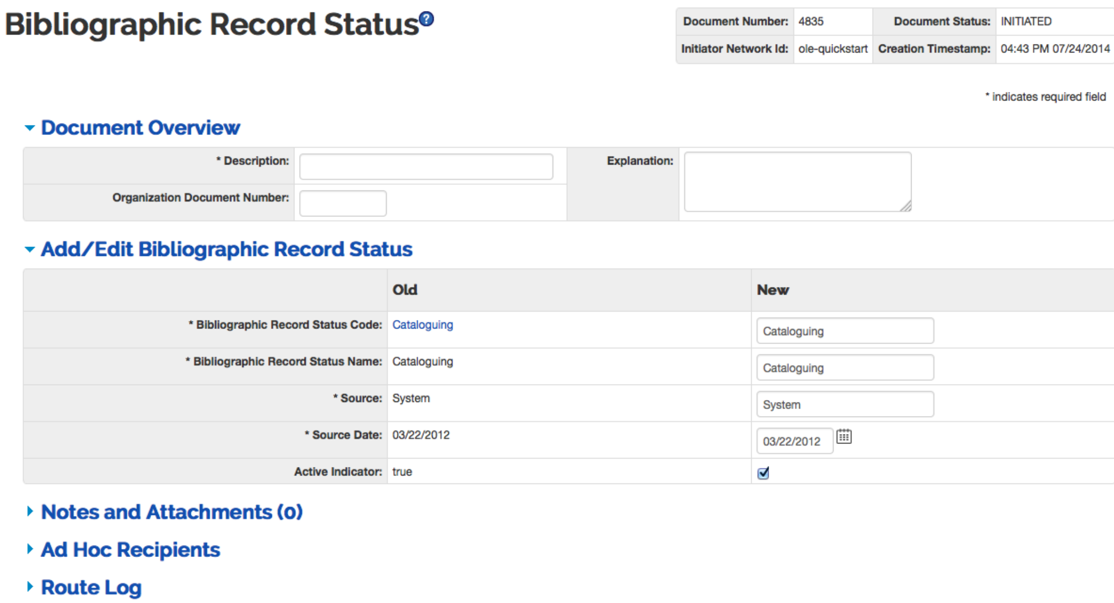
Maintenance > Cataloging Admin > Bibliographic Record Status > Bibliographic Record Status Lo

> Bibliographic Record Status

The Bibliographic Record Status maintenance document is used to assign a status to a bibliographic record. Some examples include cataloging complete, on order, electronic resource.

Only system administrators will be able to create and add Bibliographic Record Statuses.

Document Layout



The Bibliographic Record Status document includes the **Add/Edit Bibliographic Record Status** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Bibliographic Record Status tab definition

Title	Description
Bibliographic Record Status Code	The code to identify the bibliographic record status. Maximum length is 30 characters.
Bibliographic Record Status Name	Required. The familiar title of the bibliographic record status. Maximum length is 100 characters.
Source	Required. The source of the bibliographic record status.
Source Date	Required. The date for which the bibliographic record status was retrieved from the source.
Active Indicator	Indicates whether the bibliographic record status is active or inactive. Remove the checkmark to deactivate this code

Globally Protected Field

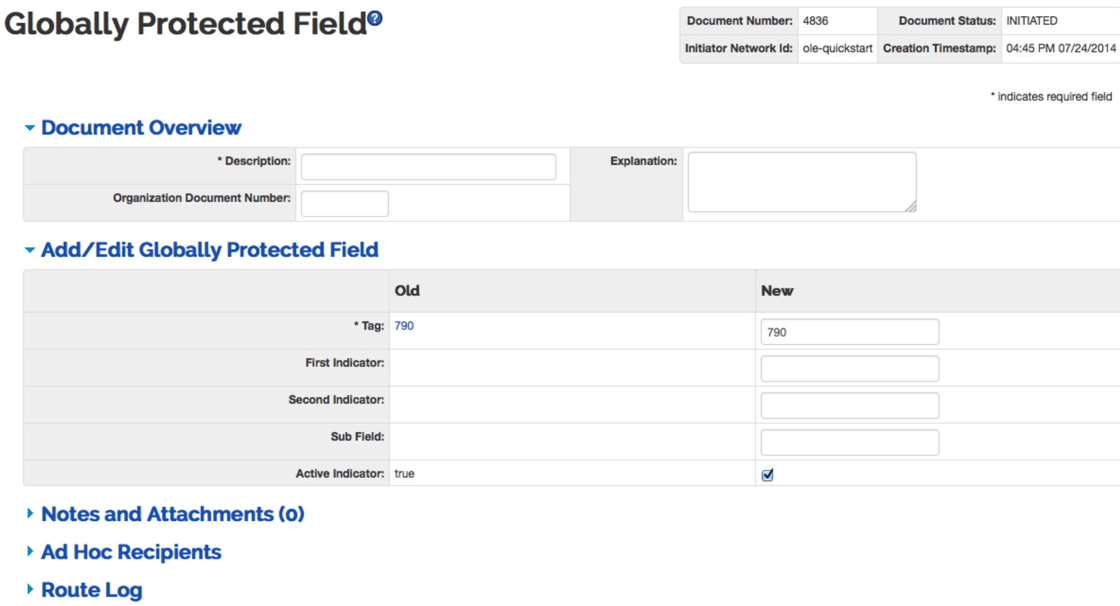
The **Globally Protected Field** Maintenance Document is used to maintain the protected fields for importing files into the OLE DocStore. The globally protected fields contain MARC tags/indicators/subfields that should not be dropped from the MARC record but could be modified if indicated.

A list entry has several data elements: tag, first indicator, second indicator, (optionally) subfield code, and protection flag. Wildcards (for example: 01*, 9**, 050*) can be used anywhere except for the protection flag. The list entry will apply to all matching fields.

Note

Globally protected fields can be overridden through the load profile.

Document Layout



The Globally Protected Field document includes the **Add/Edit Globally Protected Field** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Globally Protected Field tab definition

Title	Description
Tag	Required. The MARC tag that will globally protected during ingest.
First Indicator	Optional. The MARC first indicator that will be globally protected during ingest.
Second Indicator	Optional. The MARC second indicator that will be globally protected during ingest.
Sub Field	Optional. The MARC subfield that will be globally protected during ingest.
Active Indicator	Indicates whether this licensing requirement code is active or inactive. Remove the check mark to deactivate this code.

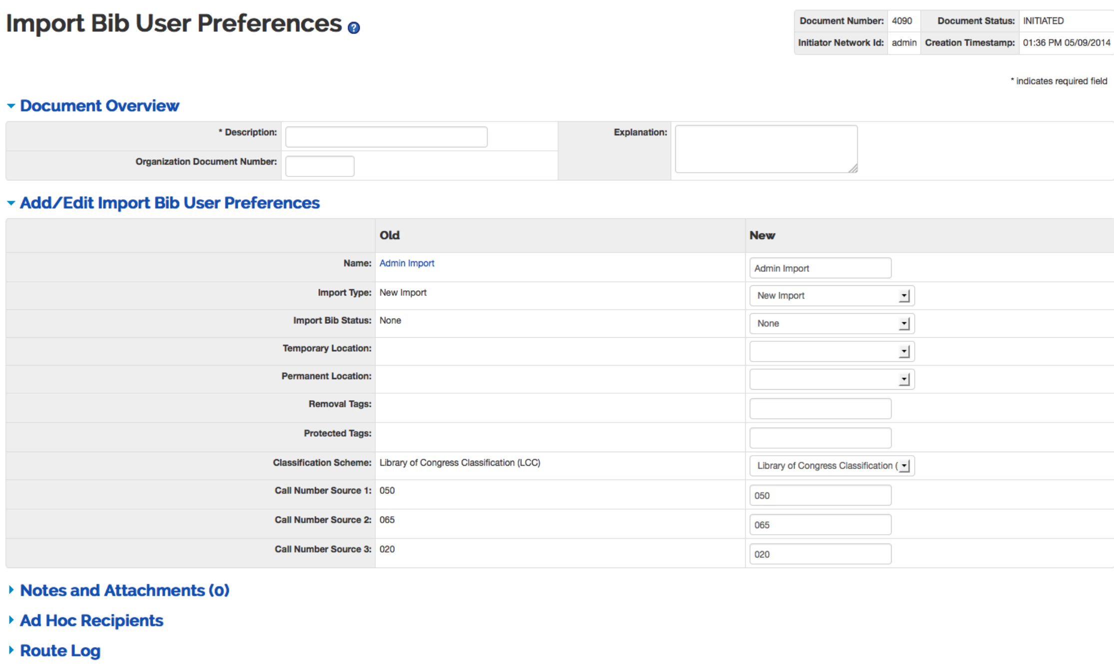
Bib Import Preferences

>

Import Bib User Preferences

Users may set preferences to apply to all records during the import process. These settings can be overridden during the import process.

Document Layout



The User Preferences document includes the **Add/Edit Import Bib User Preference** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Import Bib User Preference tab definition

Title	Description
Name	The familiar title of the user preference.
Import Type	Select the type of import to be performed from the dropdown list.
Import Bib Status	Select a status for the bibliographic records to inherit upon import completion.
Temporary Location	Optional. Select a temporary location for the bibliographic records to inherit upon import completion.
Permanent Location	Select a permanent location for the bibliographic records to inherit upon import completion.
Removal Tags	Enter any tags to be removed when importing bibliographic records
Protected Tags	Enter any tags that will not be affected when importing bibliographic records
Classification Scheme	Select the classification scheme for the bibliographic records to inherit upon import completion.
Call Number Source 1	Enter a first priority for mapping MARC fields and subfields into OLE item's call number fields.

Call Number Source 2	Enter a second priority for mapping MARC fields and subfields into OLE item’s call number fields.
Call Number Source 3	Enter a third priority for mapping MARC fields and subfields into OLE item’s call number fields.

Call Number Type

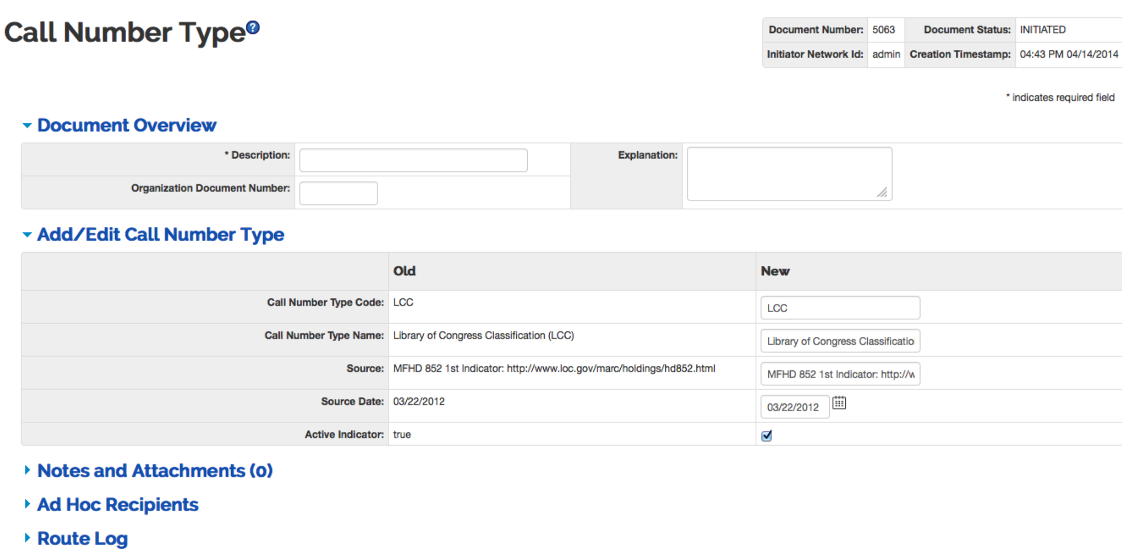
Maintenance > Cataloging Admin > Call Number Type > Call Number Type Lookup > Call Number Type

The Call Number Type maintenance document defines what type of classification system is used within OLE. Call Number Types are used on Holdings, Items, and E-Holdings records and can be searched upon from the Search Workbench. Some examples include Library of Congress, Dewey Decimal.

When a call number is assigned to a holdings or an item, whether by a cataloger or by a batch load process, the call number type has to be specified. The call number type determines how OLE assigns the Shelving Order value, which is used for sorting call numbers when you do a call number browse in Search Workbench. If you enter “DC223.4 .C83 2014” in the Call Number field of a holdings record, choose “Library of Congress Classification,” and submit, OLE automatically formulates a Shelving Order value of “DC 0223.400000 C0.830000 002014” for sorting purposes.

Because call number type is associated with the process of formulating Shelving Order values, you are not able make up a new call number type from within the Call Number Type document without modifying the code and formulating rules for Shelving Order values.

Document Layout



The Call Number Type document includes the **Add/Edit Call Number Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Call Number Type tab definition

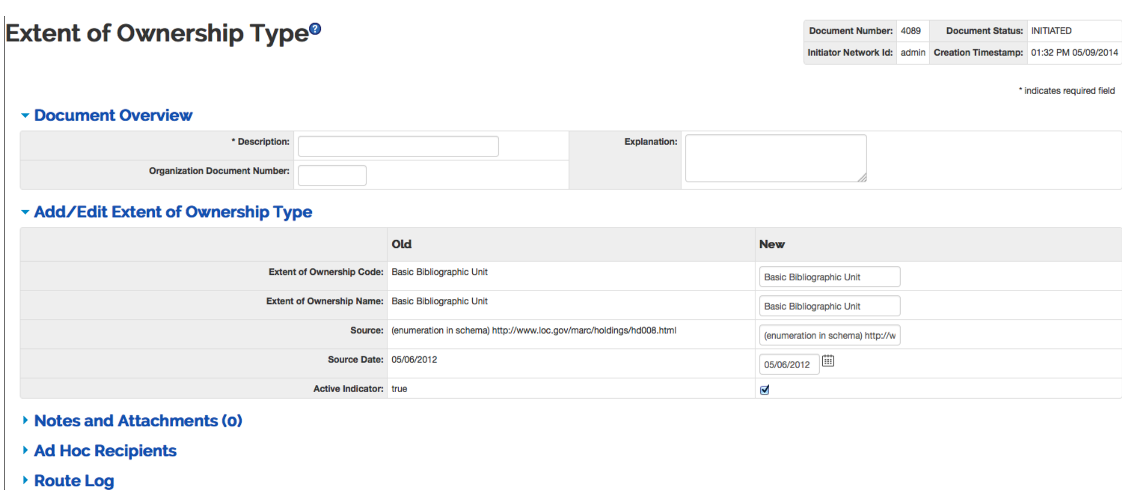
Title	Description
Call Number Type Code	The code to identify the call number type. Maximum length is 30 characters.
Call Number Type Name	Required. The familiar title of the call number type. Maximum length is 100 characters.
Source	Required. The hyperlink to the source of the call number type.
Source Date	Required. The date for which the call number type was retrieved from the source.
Active Indicator	Indicates whether the call number type is active or inactive. Remove the checkmark to deactivate this code

Extent of Ownership Type (Type of Ownership)

Maintenance > Cataloging Admin > Extent of Ownership Type > Extent of Ownership Type Look > Extent of Ownership Type

The Type of Ownership maintenance document describes the type of information to be captured for the extent of ownership. Some examples include basic, supplementary, and indexes.

Document Layout



The Type of Ownership document includes the **Add/Edit Type of Ownership** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Type of Ownership tab definition

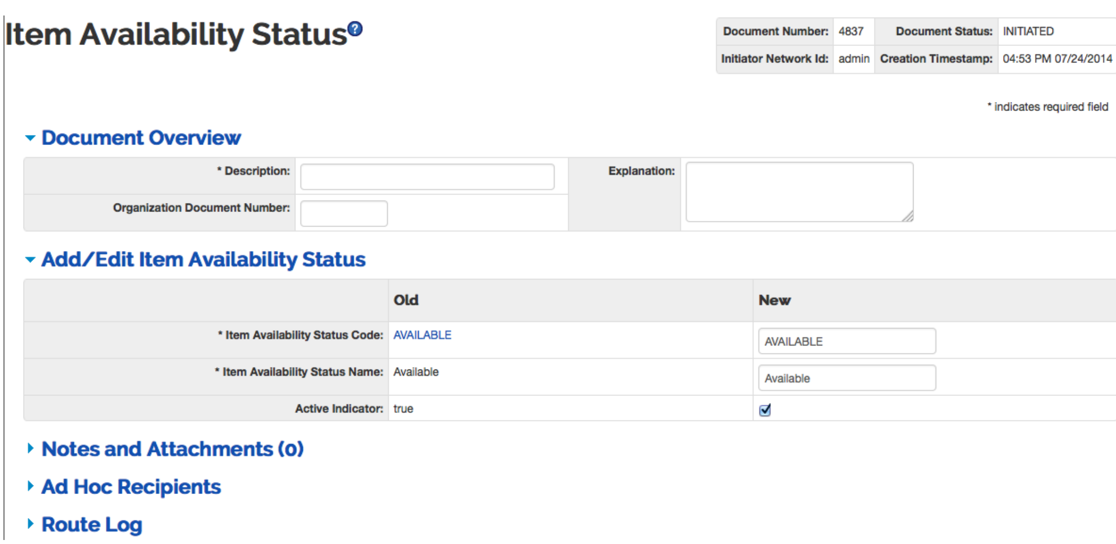
Title	Description
Extent Of Ownership Code	The code to identify the extent of ownership. Maximum length is 100 characters.
Extent Of Ownership Name	Required. The familiar title of the extent of ownership. Maximum length is 100 characters.
Source	Required. The hyperlink to the source of the extent of ownership.
Source Date	Required. The date for which the extent of ownership was retrieved from the source.
Active Indicator	Indicates whether the extent of ownership is active or inactive. Remove the checkmark to deactivate this code

Item Availability Status

Maintenance > Cataloging Admin > Item Availability Status > Item Availability Status Lookup > Item Availability Status

The Item Availability Status maintenance document defines the status of an item. Some examples include on order, available, loaned and intransit.

Document Layout



The Item Availability Status document includes the **Add/Edit Item Availability Status** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Item Availability Status tab definition

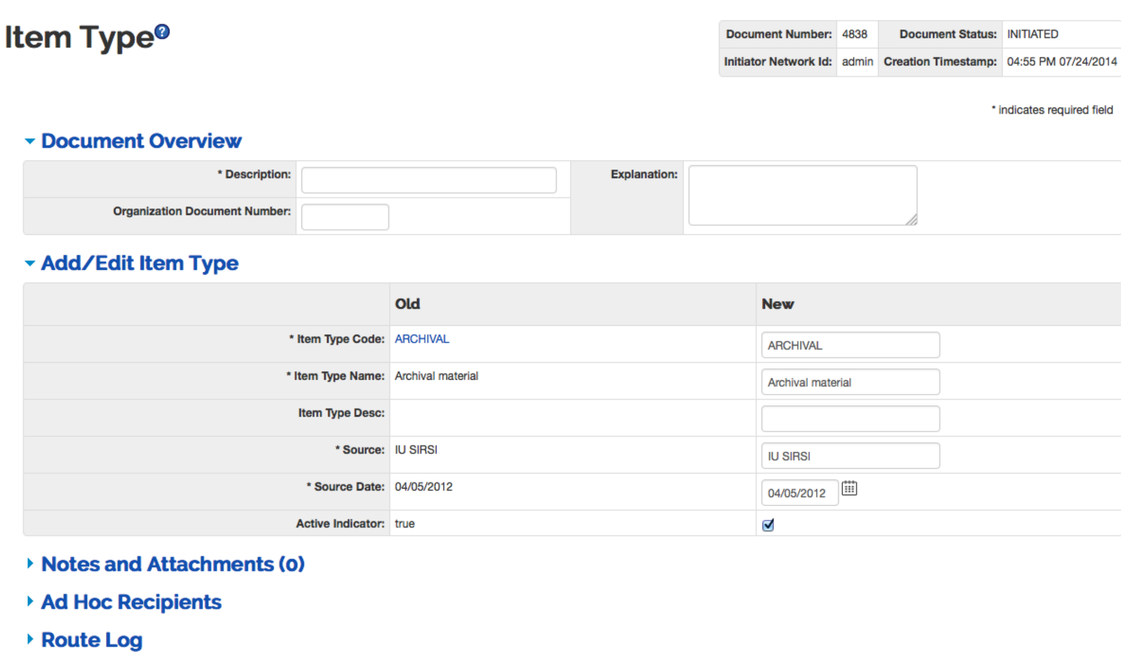
Title	Description
Item Availability Status Code	The code to identify the item availability status. Maximum length is 30 characters.
Item Availability Status Name	Required. The familiar title of the item availability status. Maximum length is 100 characters.
Active Indicator	Indicates whether the item availability status is active or inactive. Remove the checkmark to deactivate this code

Item Type

Maintenance > Cataloging Admin > Item Type > Item Type Lookup > Item Type

The Item Type maintenance document defines library items types. Some examples include DVD, 2-hour reserve, 24 hour loan. The Item Type is used to determine loan periods for circulating library materials.

Document Layout



The Item Type document includes the **Add/Edit Item Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Item Type tab definition

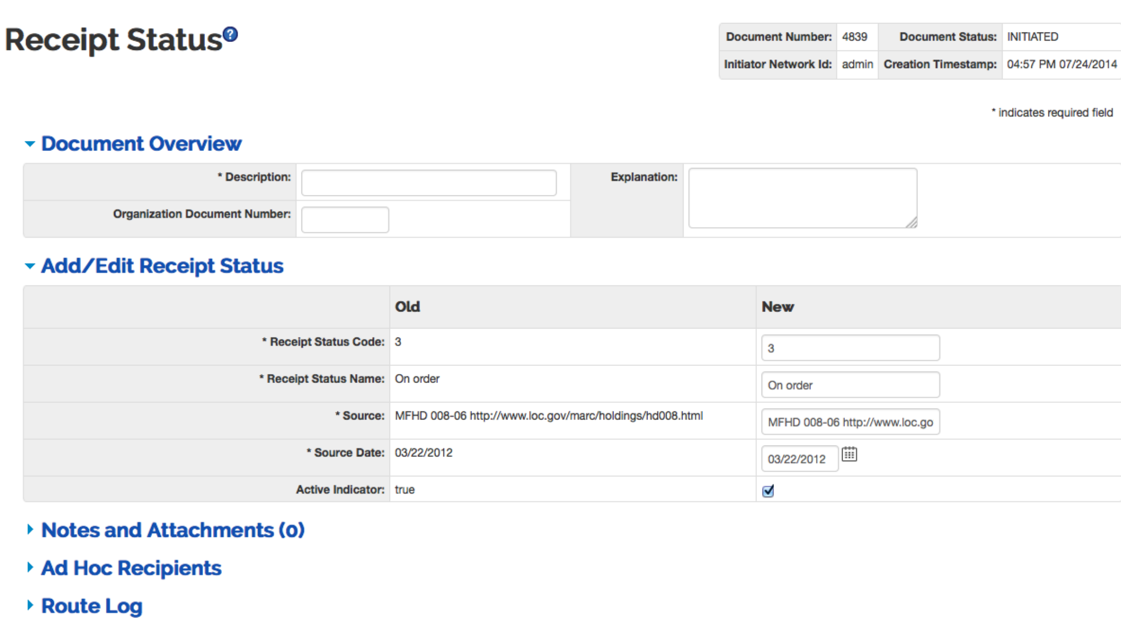
Title	Description
Item Type Code	The code to identify the Instance item type. Maximum length is 30 characters.
Item Type Name	Required. The familiar title of the Instance item type. Maximum length is 100 characters.
Item Type Desc	The familiar description of the Instance item type
Source	Required. The source of the Instance item type.
Source Date	Required. The date for which the Instance item type was retrieved from the source.
Active Indicator	Indicates whether the Instance item type is active or inactive. Remove the checkmark to deactivate this code

Receipt Status

Maintenance > Cataloging Admin > Receipt Status > Receipt Status Lookup > Receipt Status

The Receipt Status maintenance document describe the status of newly published parts of a mulitpart or serial item.

Document Layout



The Receipt Status document includes the **Add/Edit Receipt Status** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Receipt Status tab definition

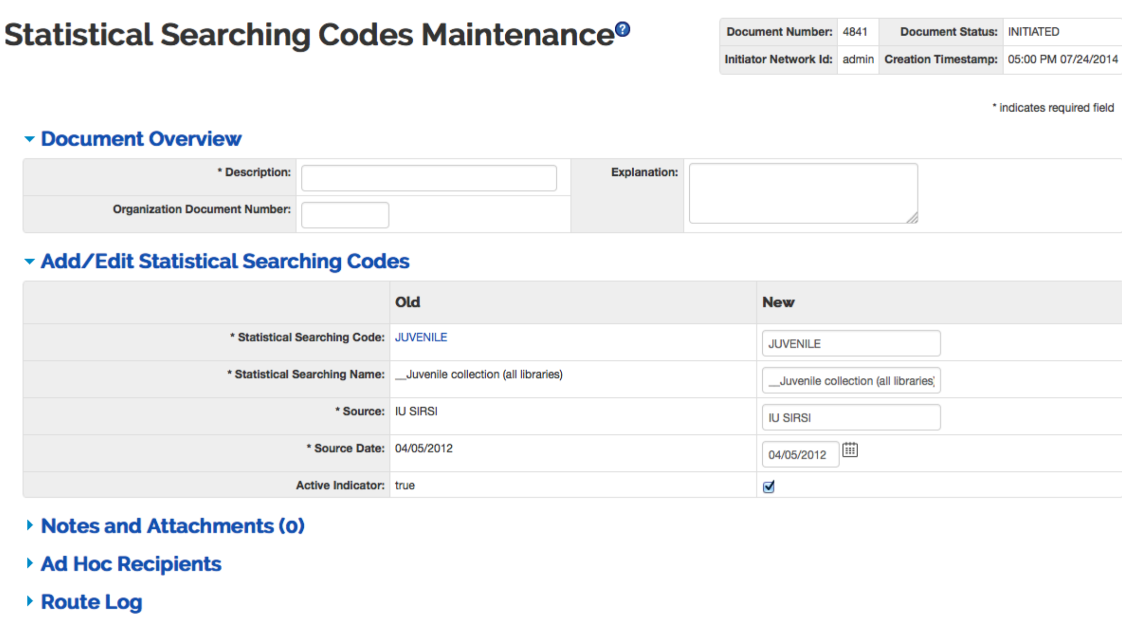
Title	Description
Receipt Status Code	The code to identify the receipt status. Maximum length is 30 characters.
Receipt Status Name	Required. The familiar title of the receipt status. Maximum length is 100 characters.
Source	Required. The hyperlink to the source of the receipt status.
Source Date	Required. The date for which the receipt status was retrieved from the source.
Active Indicator	Indicates whether the receipt status is active or inactive. Remove the checkmark to deactivate this code

Statistical Searching Codes

Maintenance > Cataloging Admin > Statistical Searching Codes > Statistical Searching Codes Lo
> Statistical Searching Codes Mai

The Statistical Searching Code maintenance document defines items. It is used to help limit items when searching and used for reporting. Some examples include Juvenile, CD, Microfiche and GovDocs.

Document Layout



The Statistical Searching Codes document includes the **Add/Edit Statistical Searching Codes** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Statistical Searching Codes tab definition

Title	Description
Statistical Searching Code	The code to identify the statistical searching code. Maximum length is 30 characters.
Statistical Searching Name	Required. The familiar title of the statistical searching code. Maximum length is 30 characters.
Source	Required. The hyperlink to the source of the statistical searching code.
Source Date	Required. The date for which the statistical searching code was retrieved from the source.
Active Indicator	Indicates whether the statistical searching code is active or inactive. Remove the checkmark to deactivate this code

Chapter 5. Appendix

DocStore and Editor Terms and Definitions

Term	Definition
Bibliographic Record	An OLE document that describes a bibliographic entity as published. OLE will initially support two kinds of bibliographic records: (1) Those in the USMARC bibliographic formats, and (2) Dublin Core records. Synonym: Bibliographic Description
Bound-with	A physical object where two or more titles are joined together under one cover. The object is represented in a system as a single item which links to more than one bibliographic record.
[Element] Classification	The set of data elements within the OLE Instance Schema that, taken together, make up the “call number” and state what classification/call number system (e.g., Library of Congress, Superintendent of Documents, and Dewey Decimal) the call number conforms to.
Code	An individual Code within a Code List. A Code within a table of Codes will have the attribute, Display Value. See also Display Value.
Code List	A list of valid values for a particular data element within OLE. For example, there will be a Code List for Locations; a user cannot assign a Location value within an Item unless it is part of the library’s Location Code List (which might be shown in an OLE editor in the form of a pull-down menu). Ideally, the user could not assign the Code for a Location unless the user were authorized to assign that particular Code (in which case the OLE editor should show the user a pull-down menu of Locations that included only those Locations that the user is allowed to use).
Copy	A single specimen of an intellectual entity, e.g., a library can have one (or more) Copies of a multivolume set. A single subscription to a journal may also be known as a Copy. A multi-part book (or a serial subscription) is a Copy with as many Items as there are volumes.
Display Value	An attribute of a Code that specifies an alternate display value for the Code within a particular interface. For example, the code “REGENSTEIN” might have Display Value “Regenstein Library.” The display value could appear in places within the OLE user interface, but could also be used by an external Discovery Tool.
DocStore	OLE architecture for structured and unstructured metadata (e.g., bib, item, holding, authority, licenses) that works in conjunction with linked transactional data in OLE RDBMS/relational tables (e.g., purchasing, circulation, users, financial, borrowers).
Hide Record	To mark a record (bibliographic, holdings, item) so that is does not display in a public-facing service.
Holdings	Describes the extent of a resource available to the user. In the case of continuing resources holdings data may record the pattern of issuance of a resource and/or a summary statement of volumes held.
Import Process	Batch process for importing bibliographic and/or authority records, as well as accompanying holdings and/or purchase order information
Item	The smallest unit of a resource that is managed and/or circulated individually. It provides specific information about the physical location when pertinent.
Location	An element in a library’s system configuration that describes a conceptual entity or institution (e.g., “The University of X Library”) or a building (“John Doe Memorial Library”) or an area “Doe Library, Book stacks”; “Doe Library, Circulation Desk”) where items are shelved or work is performed. All library items are assigned to a Shelving Location and this becomes an attribute for circulation policy. Locations may also refer to library staff work areas at which certain functions (e.g., acquisitions (or ordering and receiving), cataloging, serials receiving, course reserve or circulation are the standard ones) are performed on or with items housed at Shelving Locations; work areas (e.g., circulation location) are identified as part of an operator’s login.
Location Code	A Code value from a Code List that describes, with a greater or lesser degree of specificity, the Location where an Item is located.

Match Point	A data element used to determine that a bibliographic record or authority record in a file of records being imported matches an existing record within OLE, such that the incoming record “overlays” and replaces the existing record completely or in part.
OLE Holding	This section of the OLE Instance records "general" holdings information in a format specific to OLE.
OLE Instance	OLE XML document type that describes individual Holdings and Items
OLE Source Holding	This section of the OLE Instance represents "specific" holdings information entered according to some standard external to OLE. Examples are MARC holdings, MODS holdings or any other format specific holdings.
Ownership	The idea that permissions or policies based on a piece of data in a document (bib control numbers, item location, and ownership field data) could be used to infer ownership, in conjunction with policies. Work Units or Roles would be connected or allowed to complete certain actions based on additional qualifier for ownership. **Note** Work units are being defined in a future release.
Public-facing Service	Any service/system that allows public users to query a library’s database. Examples include discovery layers (such as VuFind) and Z39.50.
Role or Group Qualifier/ Parameter	OLE Roles or Groups will be extended to include optional qualifiers or parameters on applied permissions. A Role or Group can continue with no qualifiers, or multiple.
Work Unit	A location, departmental, or organizational field, used to as an attribute or match point between documents and Roles/Permissions. The Work Unit will be compared between a Document and as a qualifier on a Role, in order for Permissions/Policy to designate what staff can perform which actions on a document. Work units can be designated with parent-child relationships, to allow easier creation of roles/permissions across work units (one parent work unit can include or cover multiple child work units). **Note** While locations hierarchy could be replicated for Work units, it is more granular than work units or document ownership designations may need to be. Work units and document ownership will frequently be at the Library level.

For additional OLE terms and definitions, see the OLE glossary

DocStore and Editor Roles

Below are some of the roles that will be authorized to use Describe Workbench, Bound-withs, Import Bib, Editors, Transfers, and Instance maintenance documents. Please see individual e-docs for specific requirements in each workflow.

Note

Sample users are provided for ease of testing and can be replaced with local library users.

Role Name	Sample User	Functions/ Permissions
OLE_Cataloging_Admin	admin, admin 1	Creates and edits Describe maintenance documents
Cataloging Super User	supercat, ole-khuntley	Authorized for all Describe functions; permission to administer cataloging in all work units
Cataloger Supervisor	catsup	Authorized for all Describe functions; permission to administer cataloging within assigned work unit(s)

Cataloger 1	cat1	Authorized for all Describe functions; permission to administer cataloging within assigned work unit
Cataloger 2	cat2	Authorized for all Describe functions except batch imports and bound-withs; permission to administer cataloging within assigned work unit
Temporary (Student) Staff Cataloger 1	tempcat1	Authorized to create and edit holdings/items within assigned work unit
Full Cataloging	catfull	Authorized for all Describe functions without limitation by ownership, work unit, bibliographic status or any other field-level permission
Batch Cataloging	catbatch	Authorized to do batch imports and exports
Describe Read only	describereadonly	Authorized only to view records in Describe
<any user-Action List>	<any Kuali user>	Most user roles have the permission to view editors. Anyone within OLE can search the Doc Store

Linked Resources

- OLE Basic Functionality and Key Concepts.: E-docs, action buttons- basic overview of elements
- OLE Documentation Portal
- OLE Published User Documentation on the wiki
- OLE Roadmap