



# Guide to the OLE Document Store and Describe Module

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User Documentation for the OLE Catalog and Record Editors



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# Introduction


This guide provides information about using Describe Functions. The Describe Module covers the Document Store (OLE's library catalog) and cataloging functions.

 To learn more about the Describe Module, see the *Describe Overview* in the wiki's [Driver's Manual](#).

This guide is organized as follows.

- The first section provides an explanation of the OLE Document Store – how records are organized and how to search them.
- The next section provides an explanation of the Describe Cataloging functions.
- Following is a section that details each of the Editors available within OLE
- The remaining sections presents information related to maintaining Cataloging records

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.

 In order to work efficiently in the system's Describe 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 the [OLE and Rice-KFS wiki pages](#).

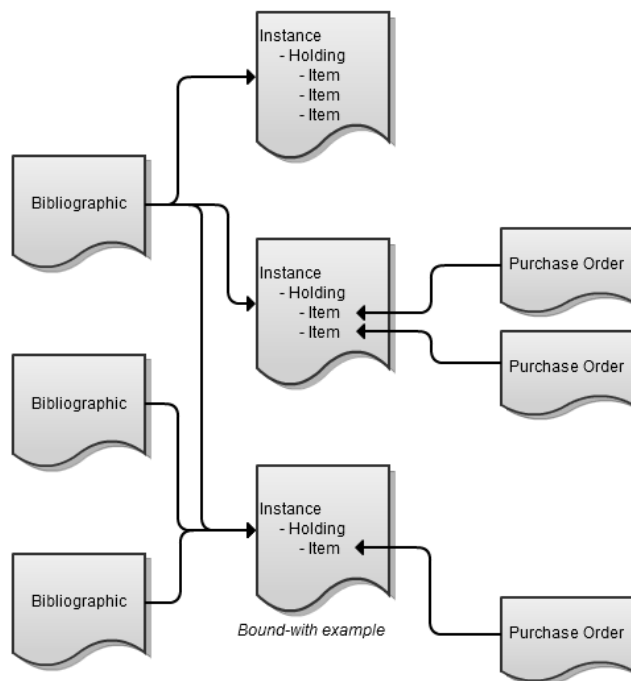
This and other OLE user guides are available for download from the [OLE 0.8 Milestone User Documentation](#).

# Document Store Introduction

The OLE technical architecture includes a Document Store (DocStore), or content repository, for the description and management of library resources – including bibliographic and localized OLE instance documents (explained below) that describe holdings and items. DocStore technology ([Apache Jackrabbit 2.0](#)) allows for the storage of multiple formats for both standardized, structured content, e.g., MARCXML, Dublin Core, OLE Instance (Holding and Item records), ONIX-PL, and nonstandard, unstructured content, for example licensing attachments. With each new release of OLE, the addition of new document types will only require re-configuration of the DocStore hierarchies rather than the restructuring of the relational.

The DocStore links documents (both within and across document types) according to pre-defined business rules, and [Apache Solr 3.0](#) allows for indexing and retrieval across multiple document types/formats. The DocStore also provides for version control, and OLE 0.8 allows users to either edit MARCXML documents in an OLE-designed MARC editor or checkout OLE Instance documents for editing using an OLE-designed Instance editor. Future releases will also support document check-in as well as a full range of audit controls.

As part of the acquisitions lifecycle, bibliographic and localized resource descriptions are either ingested from selections made on vendor web sites and linked to financial e-docs or are created from scratch using the OLE editor



More information about searching within the DocStore and making edits to documents in the DocStore is found [below](#).


For a technical architecture picture of the DocStore, go to <https://wiki.kuali.org/display/OLE/OLE+DocumentStore>.

# Document Store Discovery

Cataloging

[Main Menu](#) > 
 [Acquisitions Search](#) > 
 [Document Store Search](#) > 
 **Document Store Discovery**

**Document Store Search** is located on the **Acquisitions Search** submenu on the **Main Menu**. The **Document Store Search** is a content management system for library records such as Bibliographic, Instance (Holdings and Items), Licenses, etc.

 Note for searching records: Breadcrumbs are planned for a later release, for now you can navigate through the Doc Store but will want to make note of where you have been if you want to return to the same record.

## Bibliographic Records

From the **Document Store Search**, bibliographic data in the DocStore can be searched in a variety of ways.


### Document Store Discovery

#### Advanced Search

Document Category:  Sort By:   
 Document Type:   
 Document Format:


All of these in Search Field:   
 AND  OR  NOT  
 All of these in Search Field:   
 AND  OR  NOT  
 All of these in Search Field:   
 AND  OR  NOT  
 All of these in Search Field:   
 AND  OR  NOT  
 All of these in Search Field:


#### Advance Search Field Definitions

Title	Description
Document Category	General category of documents being searched.  Work is the only valid category in 0.8
Document Type	Type of documents associated with a category. For the category <b>Work</b> , these include bibliographic, licenses, Instances, items, etc.

Document Format	Limits searches to a specific data format (i.e., MARC, Dublin Core, and Dublin Unqualified). Defaults to <b>ALL</b>
Sort By	Sorts the records by title, author, publication date, and relevance

Five search lines are provided in the Document Store Discovery Layer. Standard Boolean operators (AND, OR, NOT) can be chosen to combine the search terms. Truncation is not automatic in OLE 0.8; the truncation symbol is an asterisk. An asterisk can also be used as a wildcard character within a word.

 **Known bug:** Special characters such as ‘&’ and ‘.’ are not recognized when searching.

A default sort for the result set can be specified from either the search or the results screen. After all search and sort parameters are entered, click .

**Document Store Discovery**

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - all  
**SearchTerms**-(Title:(mysteries))NOT(Author:(christie))  
 Limited To:(No limits applied)

Limit Your Search...

**Author**

- Gill, Gillian (1)
- McNamara, Frances. (1)

**Subject**

- Authors, English -- 20th century (1)
- Authors, English -- 20th century -- Biography. (1)
- Christie, Agatha, 1890-1976 (1)
- Detective and mystery stories, English -- History and criticism. (1)
- Detective and mystery stories -- Periodicals. (1)

[more...](#)

1-3 of 3 results

Sort By

[\[Expand All\]](#) | [\[Collapse All\]](#)

**1. Agatha Christie : the woman and her mysteries /**

Author: Gill, Gillian  
 Publisher: New York : Free Press, c1990.  
 Description:  
 Subject: Christie, Agatha, 1890-1976  
 Location:  
 Format: Book  
 Doc Type: bibliographic  
 Doc Format: marc

**Instance-1**

**2. Death at Pullman /**

Author: McNamara, Frances.  
 Publisher: [Forest Park, Ill.] : Allium Press of Chicago, c2011.

A short selection of fields from the bibliographic data is displayed for each title. To refine your search, you can use the **facets** on the left-hand side of the results screen:

Document Store Discovery

Revise Search New Search

Limit Your Search...

**Author**

- Gill, Gillian (1)
- McNamara, Frances. (1)

**Subject**

- Authors, English -- 20th century (1)
- Authors, English -- 20th century -- Biography. (1)
- Christie, Agatha, 1890-1976 (1)
- Detective and mystery stories, English -- History and criticism. (1)
- Detective and mystery stories -- Periodicals. (1)

more...

**Format**

- Book (2)
- Journal/Periodical (1)

Clicking on these returns a smaller, more limited search result set. Clicking on more than one facet reduces the result set even further. The facets being used for limiting results are shown at the top of the results index:

Document Store Discovery

Revise Search New Search

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - all  
**SearchTerms**-(Title:(mysteries))NOT(Author:(christie))  
 Limited To:Book  Gill, Gillian

Limit Your Search...

**Author** 1-1 of 1 results

- Gill, Gillian (1)

**Subject**

1. Agatha Christie : the woman and her **mysteries** /

To remove a limit, click on the red [x] next to it. The search results are then re-displayed with that limit removed.

If you need to see more titles on a screen, each entry can be collapsed to show only its titles. All entries can be collapsed at once by using the **Collapse All** link in the upper right:

Revise Search New Search

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - marc  
**SearchTerms**-(Title:(ot\*ello))NOT(Author:(shak\*))  
 Limited To:Verdi, Giuseppe,  Sound recording

Limit Your Search...

Selected page: 1 Go to page

**Author** 1-25 of 61 results

- Verdi, Giuseppe, (61)
- Boito, Arrigo, (15)
- Del Monaco, Mario, (9)
- Gobbi, Tito (7)
- Martinelli, Giovanni, (7)

more...

**Subject**

- Operas. (35)

Sort By Pub date (new-old) Show 25

[Expand All] **[Collapse All]**

1. Selezioni da: **Otello**

2. **Otello**

3. Ballet music from Les Vêpres siciliennes, Macbeth, Don Carlos, **Otello**, Aida

4. **Otello**

To view more results you may slide or click on the search bar, type in a page number, or hover your mouse near the left of the **Selected page** field to use the up/down arrows. You will then need to click **Go to page**.

Selected page:

1-25 of 54 results

Sort By


1. **Otello** Giuseppe Verdi.


OLE is designed to search data in a variety of formats. OLE 0.8 contains bibliographic data in MARC and Dublin Core formats, both stored in XML. The record format is shown at the bottom of the bibliographic information. Just below the bibliographic details for each title are links to the XML versions. The **View** button opens an XML version of the record in a new window or browser tab:

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<OAI-PMH xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/ http://www.openarchives.org/OAI/2.0/OAI-PMH.xsd">
  <ListRecords>
    <record>
      <header>
        <identifier>oai:quod.lib.umich.edu:MTU01-010759290</identifier>
        <datestamp>2011-09-27T01:37:45Z</datestamp>
        <setSpec>hathitrust:pd</setSpec>
      </header>
      <metadata>
        <oai_dc:dc xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/oai_dc/ http://www.openarchives.org/OAI/2.0/oai_dc.xsd">
          <dc:title>
            Going public : what writing programs learn from engagement / edited by Shirley K. Rose, Irwin Weiser.
          </dc:title>
          <dc:subject>
            English language--Study and teaching (Secondary)--United States.
          </dc:subject>
          <dc:subject>Language arts (Secondary)--United States.</dc:subject>
          <dc:description>259 p. ;</dc:description>
          <dc:publisher>Logan, Utah : Utah State University Press,</dc:publisher>
          <dc:date>2010.</dc:date>
        </oai_dc:dc>
      </metadata>
    </record>
  </ListRecords>
</OAI-PMH>
```

The **Edit** link will open the Bibliographic Editor.

 For more information about the bibliographic editor, see [below](#)

 Note: The View and Edit buttons will most likely change in future releases.

At any time, you may choose to revise your search or start a new search. These options are located at the top left side of the results screen.

### Document Store Discovery

## Instance, Holdings and Item Records

OLE Instance documents are used to identify and describe library resources locally owned/licensed by libraries and as such contain unique information that cannot be captured in Bibliographic documents that may be used and/or shared by multiple libraries.

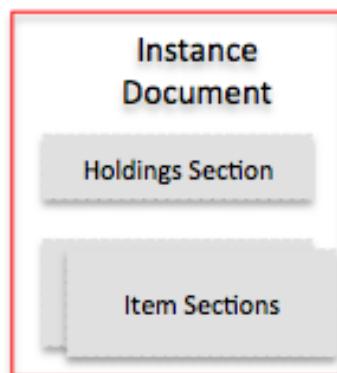
Each bibliographic record must have at least one holdings record, and each holdings record must have at least one item record.



The OLE Instance document is a container for recording holdings and item information for a bibliographic record. Even though there is a standard for [MARC Holdings](#), there isn't one for items and depending on the vendor systems, these are stored in different ways. OLE Instance defines a standard for storing holdings/item information in three main sections

- **oleHoldings**: This section records "general" holdings information in a format specific to OLE.
- **sourceHoldings**: This section represents "specific" holdings information entered according to some standard external to OLE. Examples are MARC holdings, MODS holdings or any other format specific holdings. Only oleHoldings are supported in 0.8. Support for MARC holdings is currently planned for 1.5.
- **items**: This section records information about 1 or more items. Within an OLE Instance there must be at least one Item record, and there may be many Item records.

An OLE Instance must contain two main parts: one and only one Holding record, and one or more Item record. For a given bibliographic record, only one of either oleHoldings or sourceHoldings can be used as the main holdings record. If an OLE Instance is initially was created using oleHoldings, a staff user will be able to convert the oleHoldings to sourceHoldings.



The OLE Instance schema is loosely based on the MARC Format for Holdings Data (MFHD) and represents core elements that must be included when describing holdings and items. The schema does not support every MFHD field/subfield but does include additional pieces of information not supported by MFHD. Because the current schema only represents "core" elements, it does allow for the addition of "local" pieces of data via the <extension> element.

The OLE Instance schema does not dictate how libraries combine items to comprise holdings data. As with MFHD, libraries may choose to describe multiple copies of a single resource in one OLE Instance or provide separate OLE Instance documents for each copy.

To learn more about the Instance schema, including business rules and tasks or issues that will be completed in future releases, see the wiki page [OLE Instance Documentation](#).

Both the schema and the schema documentation may also be found on the wiki, direct links are:

- [Schema](#)
- [List of Data Elements/Attributes](#)

## Instance and Item Searching

Some bibliographic search results may include link(s) to one to many Instance (with Holding) and Item records, for those created during acquisitions or as part of OLE sample data:

1. [Agatha Christie : the woman and her mysteries /](#)

Author: Gill, Gillian  
Publisher: New York : Free Press, c1990.  
Description:  
Subject: Christie, Agatha, 1890-1976  
Location:  
Format: Book  
Doc Type: bibliographic  
Doc Format: marc

[View](#) [Edit](#) **Instance-1**

2. [Death at Pullman /](#)

Author: McNamara, Frances.  
Publisher: [Forest Park, Ill.] : Allium Press of Chicago, c2011.  
Description:  
Subject: Pullman Strike, 1894 -- Fiction.  
Location:  
Format: Book  
Doc Type: bibliographic  
Doc Format: marc


[View](#) [Edit](#) **Instance-1**

3. [Mystery annual.](#)

Author:  
Publisher: New York : Random House, 1946-  
Description:  
Subject: Detective and mystery stories -- Periodicals.  
Location:  
Format: Journal/Periodical  
Doc Type: bibliographic  
Doc Format: marc

[View](#) [Edit](#) **Instance-1**

You may select the **Instance** link to see the Instance metadata, or link from it to further Holding or Item(s) data. There is limited data in the Item records that have been added to the Document Store. To return to the Bibliographic description, select the **Bibliographic** link.

 Note: Links may change in future releases to reflect more descriptive data (such as enumeration/chronology information in place of Instance-1 or Item-1)

1. Alternative energy sources V : proceedings of the Fifth Miami International Conference on Alternative Energy Sources, Miami Beach, Florida, December 13-15, 1982 /

**Bibliographic Record**

Author:  
 Publisher: Amsterdam ; New York : Elsevier ; New York, NY : Distributors for the United States and Canada, Elsevier Science Pub. Co., 1983.  
 Description: pt. A. Solar radiation/collection/garage/storage -- pt. B. Solar applications -- pt. C. Indirect solar/geothermal -- pt. D. Biomass/hydrocarbons/hydrogen -- pt. E. Nuclear/conservation/environment -- pt. F. Energy economics/planning/education.  
 Subject: Renewable energy sources -- Congresses.  
 Location:  
 Format: Conference/Event  
 Doc Type: bibliographic  
 Doc Format: marc

View Edit Instance-1

1. 08a800fe-e106-478b-b6ae-84d656f4ae48 Instance-1

Source:  
 Doc Type: instance  
 Doc Format: oleml

View Edit Bib-1 Holdings Item-1 Item-2

1. e152ddb9-d85b-45e0-9d79-a2a85e66a78a Holdings

Holding URI:  
 Holding Note:  
 Receipt Status:  
 Call Number: 621.042 M618a 5th 1982  
 Call Number Type:  
 Call Number Prefix:  
 Classification Part:  
 Doc Type: holdings  
 Doc Format: oleml

View Edit Bib-1 Item-1 Item-2

1. 00c67a1c-p857-41e6-9f7f-35152f7be4fb Item-1

Barcode: 39151003196520  
 Item Type:  
 Vendorline id:  
 Shelving Scheme:  
 Shelving Order: 621.04200000-M618-a-000005th-001982-pt.B  
 Purchaseorder id:  
 Copy Number:  
 Volume Number: Item  
 Doc Type: item  
 Doc Format: oleml

View Edit Bib-1 Instance Holdings

1. 1c77107a-6e22-495f-93d6-5b2312d1dab4 Item-2

Barcode: 39151003196520  
 Item Type:  
 Vendorline id:  
 Shelving Scheme:  
 Shelving Order: 621.04200000-M618-a-000005th-001982-pt.B  
 Purchaseorder id:  
 Copy Number:  
 Volume Number: Item  
 Doc Type: item  
 Doc Format: oleml

View Edit Bib-1 Instance Holdings

OLE 0.8 provides minimal searching for Instance metadata and its holdings or items. This will be expanded upon for the 1.0 release.

At present, users only have the **Search Field** option "source" available when searching Instance documents, but can further search Holdings data like below:

**Advanced Search**

Document Category: Work      Sort By: Title (A-Z)

Document Type: Instance Holdi

Document Format: OLEML

All of these in Search Field: All  
 AND  OR  NOT  
 All of these in Search Field: All  
 AND  OR  NOT  
 All of these in Search Field: All  
 AND  OR  NOT  
 All of these in Search Field: All  
 AND  OR  NOT  
 All of these in Search Field: All

Search Field: All  
 All  
 Call Number Type  
 Call Number  
 Call Number Prefix  
 Classification Part  
 Shelving Scheme Code  
 Shelving Scheme Value  
 Shelving Order Code  
 Shelving Order  
 Item Part  
 Uri  
 Holdings Note  
 Receipt Status  
 Location Level  
 Location Level Name  
 All

Or further, test searching on Item data.

#### Advanced Search

Document Category: Work      Sort By: Title (A-Z)

Document Type: Instance Item

Document Format: OLEML

All of these in Search Field: All  
 AND  OR  NOT

All of these in Search Field: All  
 AND  OR  NOT

All of these in Search Field: All  
 AND  OR  NOT

All of these in Search Field: All  
 AND  OR  NOT

All of these in Search Field: All  
 AND  OR  NOT

Search Field: All

- All
- Call Number Type
- Call Number
- Call Number Prefix
- Classification Part
- Shelving Scheme Code
- Shelving Scheme Value
- Shelving Order Code
- Shelving Order
- Item Identifier
- Item Type
- Item Barcode
- Item Uri
- Purchase Order Line Item Identifier
- Vendor Line Item Identifier
- Barcode ARSL
- Statistical Searching Code FullValue
- Item Type FullValue
- Copy Number Label
- Copy Number

Facets for Holdings and Item data (such as location, call number sorting, etc.) will be designed and released in OLE 1.0.

#### Notes and Tips on Bib, Instance and Item searching


- Breadcrumbs are planned for a later release, for now you can navigate through the DocStore but will want to make note of where you have been if you want to return to the same record.
- If you choose an Instance from the bib and the Instance has multiple bibs that it is linked to, there is not any way to tell what bib record you came from (link descriptions are under review for 1.0).
- Instance and Item records are in their most basic form, this is a continuing proof of concept – modifications are planned for the 1.0 release
- If you use multiple words in your search, only one gets highlighted in the search results, and it's the first word that appears in the document (not the first word in your list of search terms).
- If you search for a word in plural form, OLE will show results for the singular form as well.

Click  to see Instance, Holdings or Items in their raw .xml form (like below example). OLE will generate new Instance/Holding/Item documents during the Ingest or Load process or during Requisition-to-Purchase Order creation. You may also create and edit Instances through the Instance Editor ([below](#)).

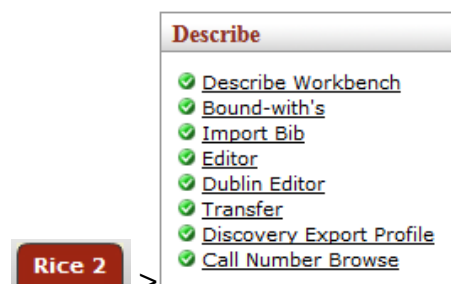
This XML file does not appear to have any style information associated with it. The document tree is shown below.

```

<instanceCollection>
  <instance>
    <instanceIdentifier>fd15f070-e964-48f9-b822-47b1c1b1c84</instanceIdentifier>
    <resourceIdentifier source="docStore">b9929211-2374-4aff-a3c6-f9465ba30e26</resourceIdentifier>
    <holdings>
      <holdingsIdentifier>81f58095-0637-47a8-8d2c-1d15fe863d57</holdingsIdentifier>
    </holdings>
    <item>
      <itemIdentifier>a939f5f6-ce12-4ab3-b494-493b09142da3</itemIdentifier>
    </item>
  </instance>
</instanceCollection>
  
```

 **Known Bug:** The bibliographic information (e.g., Title) is missing from the Item record. To see it, click the **bibliographic** link to return to the bibliographic description.

# Describe Cataloging Functions




On the Rice 2 tab, the Describe submenu provides access to additional Describe and Manage functionality that allow users to view and maintain a variety of standard Describe and Manage E-docs.

## Describe and Manage e-docs available from the Describe submenu

Document Type	Description
<a href="#">Describe Workbench</a>	The Describe Workbench is a work portal that allows users to perform cataloging tasks from one central location.
<a href="#">Bound-Withs</a>	This interface allows users to link one item and holdings with several bibliographic descriptions
<a href="#">Import Bib</a>	This interface allows users to import single bibliographic records
<a href="#">Editor</a>	This interface allows users to create and modify bibliographic, holdings, and item records.
<a href="#">Dublin Editor</a>	This interface allows users to create and modify Dublin Core records.
<a href="#">Transfer</a>	This interface allows OLE users to transfer holdings records from one bibliographic record to another and transfer item record from one holdings record to another.
<a href="#">Discovery Export Profile</a>	This interface allows users to set up profiles used to direct OLE in how to export bibliographic and Instance data to external discovery layers.
<a href="#">Call Number Browse</a>	This interface allows users to search and browse call numbers within different classification schemes.

# Describe Workbench

**Rice 2** > **Describe** >  [Describe Workbench](#) > **Describe Workbench**

The Describe Workbench is a portal to view and modify records existing within OLE.

## Process Overview

Once you have opened the **Describe Workbench**, perform a search to find the record you wish to modify.

You may select a **Document Type** and search using Boolean operators as needed. Search results appear below the **Search Conditions** tab.

### Describe Workbench

#### Search Conditions:

Document Type:  Bib  Holdings  Item

Search For:  All of these  In Search Field:

AND  OR  NOT

Search For:  All of these  In Search Field:

AND  OR  NOT


#### Search Results:

Show <input type="text" value="10"/> entries			Search: <input type="text"/>			
TITLE	AUTHOR	PUBLICATION DATE	View	Edit	OverLay	Create Instance
<input type="checkbox"/> Agatha Christie : the woman and her mysteries /	Gill, Gillian	1990				


Showing 1 to 1 of 1 entries Previous Next

Click **View** to view the bibliographic record.

Click **Edit** to open the record editor,

 For more information about record editors, see [Editor](#)

Click **Overlay** to open an interface that allows you to overlay records

 For more information about overlaying bibliographic records, see [Import Bib](#)

Click **Create Instance** to open the Instance Editor.

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

# Bound-Withs

**Rice 2** > **Describe** > **Bound-with's** > **Bound-with Instance**

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.

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

## Process Overview

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

**Bound-with Instance**

Search Conditions:

Document Type:  Bib  Holdings  Item

Search For:  All of these In Search Field: ALL

AND  OR  NOT

Search For:  All of these In Search Field: ALL

AND  OR  NOT

Search Results:

Show  entries

TITLE	AUTHOR	PUBLICATION DATE				
<input type="checkbox"/> Agatha Christie : the woman and her mysteries /	Gill, Gillian	1990		View	Edit	OverLay
<input type="checkbox"/> Agatha Christie : the woman and her mysteries /	Gill, Gillian	1990		View	Edit	OverLay
<input type="checkbox"/> Death at Pullman /	McNamara, Frances.	2011		View	Edit	OverLay
<input type="checkbox"/> Death at Pullman /	McNamara, Frances.	2011		View	Edit	OverLay
<input checked="" type="checkbox"/> Mystery annual.		1946		View	Edit	OverLay
<input type="checkbox"/> Mystery annual.		1946		View	Edit	OverLay

Showing 1 to 6 of 6 entries Previous Next

**Tree1** Bound-with

Tree1

- Death at Pullman /
  - UC:URL/Gen - PS3613 C58583 D43 2011
  - UC:SPCL/ArcMon - PS3613 C58583 D43 2011

**Tree2**

Tree2

- Mystery annual.

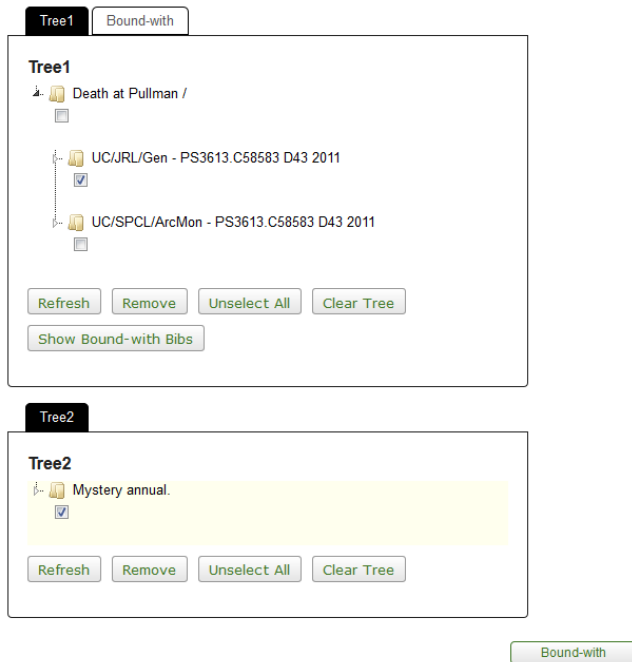
Search for the OLE Instance that will be shared by multiple bibliographic records. You may select a **Document Type** and search using Boolean operators as needed. Search results appear below the **Search Conditions** tab.

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

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).

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.



Select the holdings record for the holdings and item to be retained in Tree 1.  
Select the bibliographic description to join the holdings record from Tree 2.

Click **Bound-with** .



Tree1 Bound-with

**Bound-with**  
Instance UC/JRL/Gen - PS3613.C58583 D43 2011 bound with the following bibs :

**Bound-with Results**

- Death at Pullman /
  - UC/SPCL/ArcMon - PS3613.C58583 D43 2011
  - UC/JRL/Gen - PS3613.C58583 D43 2011
- Mystery annual.
  - UC/JRL/Gen - PN6071.D45E45
  - UC/JRL/Gen - PS3613.C58583 D43 2011

Delete Instance

Tree2

Mystery annual.

Refresh Remove Unselect All Clear Tree

Bound-with

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.

Select the extraneous instances attached to the bibliographic descriptions. These should appear after the first bibliographic description (e.g., Mystery annul) and click **Delete Instance**.

Tree1 Bound-with

**Bound-with**  
Instance UC/JRL/Gen - PS3613.C58583 D43 2011 bound with the following bibs :

**Bound-with Results**

- Death at Pullman /
- Mystery annual.

Delete Instance

**The following records will be deleted**


- UC/JRL/Gen - PN6071.D45E45

Continue Cancel

Click **Continue** to confirm the deletion.

## Business Rules

1. A Bibliographic Description must have one OLE Instance and may have many OLE Instances.
2. An OLE Instance must have one Item record and may have many Item Records.

 This rule is under review for future releases.

This requirement addresses the need of a user wishing to link an OLE instance manually to multiple bibliographic records. This constitutes a special case of the basic OLE business rule that a bibliographic record must have one OLE Instance and may have many OLE Instances. In this special case, the required OLE Instance for one bibliographic record could also constitute the required OLE Instance for one or more additional bibliographic records, such that each of the bibliographic descriptions shares that single OLE Instance. Thus, in the special case of a bound-with, an individual OLE instance may have a one-to-many relationship with bibliographic records.


3. An Item record must be linked to an OLE Instance. In the case of a bound-with, it will be linked to many OLE Instances.
4. 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.
5. 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.


# Import Bibliographic Records

**Rice 2** > **Describe** > **Import Bib** > **Import Bib**

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.

 The Import Bib is not intended for batch imports.

 For more information about importing batch records, see the Ingest section of the *Guide to Purchasing and Accounts Payable*. This and other OLE user guides are available for download from [OLE 0.8 Milestone User Documentation](#).

## Process Overview

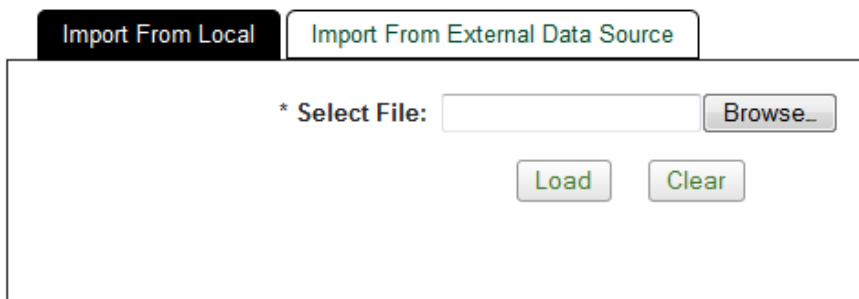
### Import from Local

Call up the **Import Bib** interface.

#### Import Bib

#### STEP-1 Locate Record

---




Search for the file from your local machine.

Click **Load**.

**Records in the File** will contain the records loaded.

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


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


### Import Bib

#### STEP-1 Locate Record

Import From Local
Import From External Data Source

**Import From Local**

\* Select File:  


 

Selected File Name: ole35.mrc  
Records In File: 5  
Records Imported: 0

**Records in the File:**

	TITLE	AUTHOR	PUBLICATION DATE	
<input type="checkbox"/>	ALCHEMY OF GLASS : COUNTERFEIT, IMITATION, AND TRANSMUTATION IN ANCIENT GLASSMAKING.		2009	<a href="#">Detail</a>
<input checked="" type="checkbox"/>	AMERICAN WOMEN OF SCIENCE SINCE 1900.	WAYNE, TIFFANY K., 1968-	2011	<a href="#">Detail</a>
<input type="checkbox"/>	ANCIENT INDIAN LEAPS INTO MATHEMATICS		2011	<a href="#">Detail</a>
<input type="checkbox"/>	ARCTIC SCIENTIST, GULAG SURVIVOR : THE BIOGRAPHY OF MIKHAIL MIKHAILOVICH ERMOLAEV, 1905-1991. BY WILL	ERMOLAEV, A. M. (ALEKSEI MIKHAILOVICH), 1932-2007	2009	<a href="#">Detail</a>
<input type="checkbox"/>	TOWN IN-BETWEEN : CARLISLE, PENNSYLVANIA, AND THE EARLY MID-ATLANTIC INTERIOR.	RIDNER, JUDITH E	2010	<a href="#">Detail</a>

Showing 1 to 5 of 5 entries   1  




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

 To learn more about creating and modifying User Preferences, see the section [Bib Import Preference](#)

Click .

## STEP-2 Confirm Settings

Name: Admin Import ▼ 


Choose the **Import Type**.

Select the **Import Status** and **Location** information from the dropdown lists.

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

Choose the **Classification Scheme** and modify the source as necessary.

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 Preferences

 To learn more about creating and modifying User Preferences, see the section [Bib Import Preference](#)

## Import Bib

### STEP-2 Confirm Settings

Name:

Import Type:  New Record  
 Replace Based On Match Point

Import Status:

Permanent Location:

Temporary Location:

Tags That Will Be Removed: 030,830,400

Additionally Remove These Tags:

Protected Fields: 050,245,100

Additional Protected Fields:


**Call Number Mapping**

Classification Scheme:


Call Number Source 1:  Call Number Source 2:   
Must be DataField tag value Ex: 050

Call Number Source 3:

If the record is new, you may edit the incoming Bibliographic Description as needed and click **Continue Process**.  
 If you are performing an overlay, click **Submit**.

 For more information about record editors, see [Editors](#)

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

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

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 Bib


### STEP-5 Import Completion

Record Import Complete	
TITLE	▲ Edit
AMERICAN WOMEN OF SCIENCE SINCE 1900.	
Showing 1 to 1 of 1 entries	
First	Previous 1 Next Last

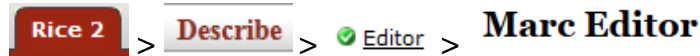
## Import From External Data Source

This interface is here to show the possibility for institutions to import bibliographic records through a Z39.50 protocol. Development is continuing into the 1.0 release. For implementation documentation see [Searching External Datasources with Z39.50](#).


## Business Rules


1. A Bibliographic Description must have one OLE Instance and may have many OLE Instances.
2. An OLE Instance must be linked to a Bibliographic Description.
3. An OLE Instance must have one Item record and may have many Item records.
-  This rule is under review for future releases.
4. An Item record must be linked to an OLE Instance.

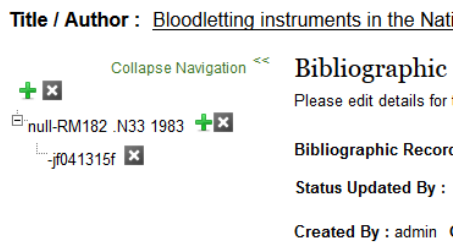
# Editor



Development of the MARC Editor has continued to be developed for the 0.8 release. This proof of concept editor is built on KRAD, or Kuali Rapid Application Development, to create more flexible and ergonomic user interfaces that allow editing of the DocStore, standardized doctypes. Significant enhancements are scheduled to be implemented for the 1.0 release however building this first document editor in KRAD/Rice 2.0 provides the framework for editing and managing future document types. Editors for MARC authority records and MARC holding records are anticipated in 1.5

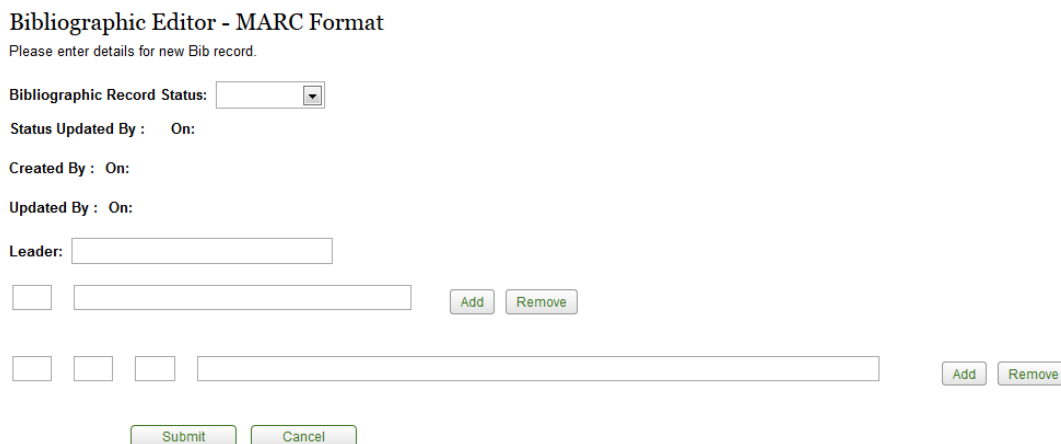
The Marc Editor may be accessed through other menu items listed below the **Describe** submenu as well as through the **edit** or **create new** buttons in transactional line items of Requisitions, Purchase Orders, Receiving, etc. or by clicking on the  link below a MARC description in the DocStore.

 You will notice the left panel navigation. This navigation panel will allow you to add (click the ) and delete (click the ) Bibliographic, Holding, and Item records.



## Process Overview

Once you have opened the Marc Editor, select a **Bibliographic Record Status** from the dropdown menu.





Enter data. The following data fields are required, at a minimum:

1. one leader field
2. one 008 control field

3. one 245 field
4. Except for the leader, delimiter values must be a 3-digit numeric character, from 000-999

✔ Future enhancements include templates to prepopulate fields.



Click  to add additional fields to the interface.

Click  to remove excess fields from the interface.

Click .

OLE will refresh the screen and redisplay the record.

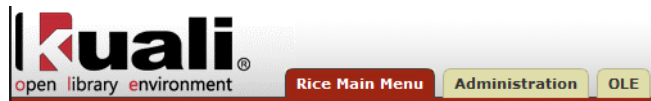
⚠ **Known bug:** If you submit an invalid record, OLE will refresh with a blank form and you will have lost the work. Error handling will improve in OLE 1.0.

Click the top level  to add a holdings record, click the  after the call number to add an item record.

**Title / Author :** Bloodletting instruments in the Nati



Click the **Rice Main Menu** tab to return to the menu.



## Business Rules

### Tips for Editor

- Leader field: \_\_\_\_\_ (ex., format should be “00337nam a2200109z 4500”)
- Control fields:
  - tags can be any 002-008 value
  - entries must contain text (no edit checks occur so anything will work)
- Content Fields:
  - \_\_\_\_ \_ \_\_\_\_\_ (ex, format “020 \_\_ \_\_ |a9780748436358”)
  - one required entry for the group of lines is a 245 field
  - the 245 subfield must start with delimiter |a (pipe, small a)
  - Do not leave a blank line from “adding” any tags before submitting

⚠ In OLE 0.8, you cannot retrieve or create a bibliographic or item document and then create a Requisition. You can only create Requisitions from the main OLE screen.

➔ See the section on Requisitions in the *Guide to Purchasing and Accounts Payable*. This and other OLE user guides are available for download from [OLE 0.8 Milestone User Documentation](#).

✔ Keyboard shortcuts are planned for 1.0.



# Dublin Editor

**Rice 2** > **Describe** > **Dublin Editor** > **Dublin Editor**

The Dublin 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 ingested and indexed by OLE (OLE-DocStore).

To learn more about ingesting records, see the *Guide to Purchasing and Accounts Payable*.

You will notice the left panel navigation. This navigation panel will allow you to navigate to other editors (bibliographic or Instance: holding or item) as well as add (click the ) and delete (click the ) records.

**Title / Author :** [Bloodletting instruments in the Nati](#)

Collapse Navigation << **Bibliographic**  
 Please edit details for:  
 null-RM182 .N33 1983   
 jf041315f   
**Bibliographic Record**  
**Status Updated By :**  
**Created By :** admin

## 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.

### Bibliographic Editor - Dublin Core (Unqualified) Format

Bibliographic Record Status:

Status Updated By : On:

Created By : On:

Updated By : On:

Select an Element

- To add a Dublin Core Record to the OLE DocStore:
- Select **Title** from the element drop down
- Enter the name by which the resource is formally known
- Click
- Select **Creator** from the drop down of the new tag line
- Enter the entity primarily responsible for making the content of the resource
- Click

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

➔ 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.)

Click

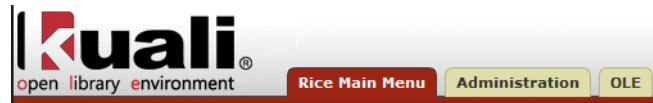
OLE will refresh the screen and redisplay the record.

Click the top level **+** to add a holdings record, click the **+** after the call number to add an item record.

**Title / Author :** [Bloodletting instruments in the Nati](#)

**Bibliographic**  
Please edit details for  
**Bibliographic Record**  
**Status Updated By :**  
**Created By :** admin

Click the **Rice Main Menu** tab to return to the menu.



# Instance Editor

The OLE Instance document is a container for recording holdings and item information for a bibliographic record. Even though there is a standard for [MARC Holdings](#) (which has often been loosely followed), there isn't one for items and depending on the vendor systems, these are stored in different ways. OLE Instance defines a standard for storing holdings/item information in three main sections as described below.

For a given bibliographic record, there can be only one of either `oleHoldings` or `sourceHoldings`. `OleHoldings` contain "general" holdings information in a format specific to OLE. This is what will be available from the Instance Editor interface. `SourceHoldings` represent "specific" holdings information entered according to some standard external to OLE. Examples are MARC holdings, MODS holdings or any other format specific holdings. These can be ingested into OLE. Finally an Instance also contains an item, the specific records information about 1 or more items.

The Instance Editor may be accessed through other menu items listed below the **Describe** submenu (Describe Workbench, Editor, etc.)

## Document Layout

The Instance Editor contains a left pane/menu (displaying a list of Instance/holdings and related items to select from) and a right pane (containing each of the elements within Instance/holdings, items, and related metadata). The right pane will break down the elements into logical groupings of related elements.

» Instance Editor (Holdings) - OLEML Format

Title / Author : [AMERICAN WOMEN OF SCIENCE SINCE 1900. / WAYNE, TIFFANY K., 1968-](#)

Collapse Navigation << Instance Editor (Holdings) - OLEML Format

Holdings record loaded successfully.

+x New Holdings/// +x


New-Item x

**Location Information**

Location:  
Type \* for all locations, other letters for matching locations

## OLE Holdings

The Instance UUID is a system generated identifier for the Instance Document. To edit records, you may enter an Instance UUID and click **Load**.

 We anticipate moving toward a more user-friendly record ID number in a future release.

## Instance Editor (Holdings) - OLEML Format

Holdings record loaded successfully.

**Location Information**

**Location:**  
Type \* for all locations, other letters for matching locations

**Call Number Information**

Prefix:  Call Number:

Shelving Order:  Call Number Type: # - No information provided

**Extent Of Ownership**

Type:

Extent of Ownership:

Type: Public

Note:

**Extended Information**

Receipt Status:

Access Information:

**Holding Notes**

Type: Public

Note:

### Location Information

The Location tab includes locations set up at each institution to describe where a resource lives, the shelving location level. Locations are captured at the holdings level and inherited by linked items.

**Location Information**

**Location:**  
Type \* for all locations, other letters for matching locations

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

### Call Number Information

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

Call Number Information	
Prefix: <input type="text"/>	Call Number: <input type="text"/> <input type="button" value="Browse"/>
Shelving Order: <input type="text"/>	Call Number Type: # - No information provided <input type="button" value="v"/>

Title	Description
Prefix	Term that precedes a call number.
Call Number	Also known as classification Part.
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 Type	Scheme used to shelve a bibliographic item in the collections of the reporting organization.

### Extent of Ownership

The Extent of Ownership tab contains the summary holdings and notes (public or private) for institutions.

Click  to add additional Extent of Ownership lines or notes.

Click  to remove excess Extent of Ownership lines or notes.

Extent Of Ownership	
Type: <input type="button" value="v"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Extent of Ownership: <input type="text"/>	
Type: Public <input type="button" value="v"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Note: <input type="text"/>	

Title	Description
Type	Select the type for extent of ownership from the list
Extent of Ownership	Corresponds to MFHD 866 (Textual Holdings - Basic Bibliographic Unit), 867(Textual Holdings - Supplementary Material), 868 (Textual Holdings - Supplementary Material) \$a Textual holdings - Textual description which may include both the captions and enumeration and chronology for the holdings of a bibliographic item in the collections of the reporting organization. These fields are normally not used in holdings 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	Field to record information that cannot be included in textualHoldings. It may be used to specifically record missing issues or numbering irregularities.

### Extended Information

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**

Receipt Status:

Access Information:

Title	Description
Receipt Status	Select the Receipt Status from the drop down list. Maps to MHLD 008-06 - Receipt or acquisition status. Whether newly published parts of a multipart (as noted in recordType) or serial item (as noted in recordType) are being received.
Access Information	Enter the URL specific to the holding

### Holding Notes

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**

Type:

Note:

Title	Description
Type	Select public or nonpublic type from the drop down list to determine whether the note will be viewable from the discovery layer.
Note	Field to record information that cannot be included in textualHoldings. It may be used to specifically record missing issues or numbering irregularities.

# OLE Items

## Instance Editor (Item) - OLEML Format

Item record loaded successfully.

Holdings Location/Call Number Information	
Location: UC/JRL/Gen	
Prefix: <input type="text"/>	Call Number: <input type="text" value="3423423"/>
Shelving Order: <input type="text" value="3423423"/>	Call Number Type: <input type="text" value="LCC - Library of Congress classification"/>
Items Location/Call Number Information	
Location: Type * for all locations, other letters for matching locations	
<input type="text"/>	
Prefix: <input type="text"/>	Call Number: <input type="text"/> <input type="button" value="Browse"/>
Shelving Order: <input type="text" value="3423423"/>	Call Number Type: <input type="text" value="# - No information provided"/>
Item Information	
Item Id: <input type="text" value="433760a5-ff58-4fc7-8545-c1d94904"/>	Enumeration: <input type="text"/>
Barcode: <input type="text"/>	Chronology: <input type="text"/>
Barcode ARSL: <input type="text"/>	Copy Number: <input type="text"/>
Former Identifiers: <input type="text"/>	Access Info (URI): <input type="text"/>
Statistical Searching Codes: <input type="text"/>	Item Type: <input type="text"/>
Temp Item Type: <input type="text"/>	Number Of Pieces: <input type="text"/>
Acquisition Information	
PO Line Item ID: <input type="text"/>	Donor Public Display: <input type="text"/>
Vendor Line Item ID: <input type="text"/>	Donor Note: <input type="text"/>
Fund: <input type="text"/>	
Price: <input type="text"/>	
Circulation Information	
* Item Status: <input type="text"/>	Fast Add: <input type="checkbox"/>
Checkin Note: <input type="text"/>	
Item Effective Status Date: <input type="text"/>	Staff Only: <input type="checkbox"/>
Extended Information	
Item Note: <input type="text" value="Public"/> <input type="button" value="Add"/> <input type="button" value="Remove"/>	High Density Storage: <input type="text"/>
<input type="text"/>	

## Holdings Location/Call Number Information

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

Holdings Location/Call Number Information	
Location: UC/JRL/Gen	
Prefix: <input type="text"/>	Call Number: <input type="text" value="3423423"/>
Shelving Order: <input type="text" value="3423423"/>	Call Number Type: <input type="text" value="LCC - Library of Congress classification"/>

## Items Location/Call Number Information

The Items 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 (Course Reserves).

Items Location/Call Number Information	
Location: Type * for all locations, other letters for matching locations	
<input type="text"/>	
Prefix: <input type="text"/>	Call Number: <input type="text"/> <input type="button" value="Browse"/>
Shelving Order: <input type="text"/>	Call Number Type: <input type="text" value="# - No information provided"/>

Title	Description
Location	Select the location from the dropdown
Prefix	Term that precedes a call number.
Call Number	Also known as classification Part.
Shelving Order	Whether a serial or multipart item is shelved under a 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 Type	Scheme used to shelve a bibliographic item in the collections of the reporting organization.

## Item Information

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



**Item Information**

Item Id: <input type="text" value="433760a5-ff58-4fc7-8545-c1d94904"/>	Enumeration: <input type="text"/>
Barcode: <input type="text"/>	Chronology: <input type="text"/>
Barcode ARSL: <input type="text"/>	Copy Number: <input type="text"/>
Former Identifiers: <input type="text"/>	Access Info (URI): <input type="text"/>
Statistical Searching Codes: <input type="text"/>	Item Type: <input type="text"/>
Temp Item Type: <input type="text"/>	Number Of Pieces: <input type="text"/>

Title	Description
Item ID	System supplied unique ID.
Barcode	Identifier physically attached to an item as a unique identifiers. Indexed to permit retrieval when the barcode is scanned or typed in as a search term. Used for For identification of physical item and for circulation purposes.
Barcode ARSL	Enter barcode for the Automated Retrieval System Location (ARSL).  Must conform to site's locally configurable validation scheme.
Former Identifiers	Identifies the previous barcode in order to track changes and replacements.
Statistical Searching Codes	Locally defined value to be used in searching for/limiting searches for items and for statistical reporting.
Temp Item Type	To temporarily change the item type, select a temporary item type from the dropdown 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; single dates may typically print at the end of the call number label attached to the part.
Copy Number	Library-assigned to distinguish each copy of the same title.
Access Info (URI)	Maps to MFHD 852 \$u Uniform Resource Identifier - (URI), for example a URL or URN, which provides electronic access data in a standard syntax. The URI links to the repository that holds the item (regardless of whether the item is analog or digital). This information may also be recorded as an organization code or text in locationName.
Item Type	Identifies types of library items. Has locally controlled

	values. Sample data: stks, DVD, 2-hour reserve, building use only.  Used in conjunction with patron type to determine a circulation policy for a particular item.
Number Of Pieces	Enter the amount of materials included with the item.

### Acquisition Information

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

Acquisition Information	
PO Line Item ID:	<input type="text"/>
Vendor Line Item ID:	<input type="text"/>
Fund:	<input type="text"/>
Price:	<input type="text"/>
Donor Public Display:	<input type="text"/>
Donor Note:	<input type="text"/>


Title	Description
PO Line Item ID	System-supplied identifier for purchase order line item.
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.
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.
Price	The price of the item from the Purchase Order
Donor Public Display	Allows the entry of a code that could be used to generate a display in the discovery layer
Donor Note	Donor information for items if not purchased using specific funds. Example: gifts

### Circulation Information

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

Circulation Information	
* Item Status:	<input type="text"/>
Checkin Note:	<input type="text"/>
Item Effective Status Date:	<input type="text"/>
Fast Add:	<input type="checkbox"/>
Staff Only:	<input type="checkbox"/>


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
Item Effective Status Date	Date on which the item status was assigned to the item. Use the calendar icon  to select the date.
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.
Staff Only	Staff only indicator. Check to keep the item from public view.  If all items attached to a holdings are flagged as staff only, the holdings will become staff only; if all holdings attached to a bib are staff only, the bib will become staff only




### Extended Information

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**


Item Note: Public    High Density Storage:

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	Identifies the Row, Module, Shelf, and Tray information for the item's High Density Storage location.

## Process Overview


### Adding a New OLE Instance 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.
3. Inputs required and optional data elements on the Holdings and Items tabs.

4. Click .

#### **Adding an Item record to an Existing OLE Instance**

1. Identify the bibliographic description and OLE Instance to which new Item Description is to be added.

2. Click the  to call up work form for a new Item record.


3. Input required and optional data elements.

4. Click .


#### **Editing an Existing OLE Instance (Holdings Description and/or Item record)**

1. Identify bibliographic description and OLE Instance to be edited.

2. Edit selected data elements and add new as necessary

3. Click .

## **Business Rules**

1. An OLE Instance must have one Holdings record and only one Holdings record.
2. An OLE Instance must have one Item record and may have many Item records.  
 This rule is under review for future releases.
3. 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).
4. A Bibliographic Description must have at least one OLE Instance and may have many OLE Instances.

# Transfer Instance/Item

**Rice 2** > **Describe** > **Transfer** > **Transfer Instance/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

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

**Transfer Instance/Item**

**Search Conditions:**

Document Type:  Bib  Holdings  Item

Search For:  All of these In Search Field: ALL

AND  OR  NOT

Search For:  All of these In Search Field: ALL

AND  OR  NOT

**Search Results:**

Show  entries

	TITLE	AUTHOR	PUBLICATION DATE				
<input checked="" type="checkbox"/>	Chaos of disciplines	Abbott, Andrew Delano.	2001	View	Edit	OverLay	Create Instance
<input type="checkbox"/>	Chaos of disciplines /	Abbott, Andrew Delano.	2001	View	Edit	OverLay	Create Instance

Showing 1 to 2 of 2 entries Previous Next

**Tree1**

Tree1

- ↳ Chaos of disciplines // Abbott, Andrew Delano.

**Tree2**

Tree2

- ↳ Chaos of disciplines / Abbott, Andrew Delano.
- ↳ B-WELLS/BWE-UGLIB-PS36113 .C58583 D43 2011

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.

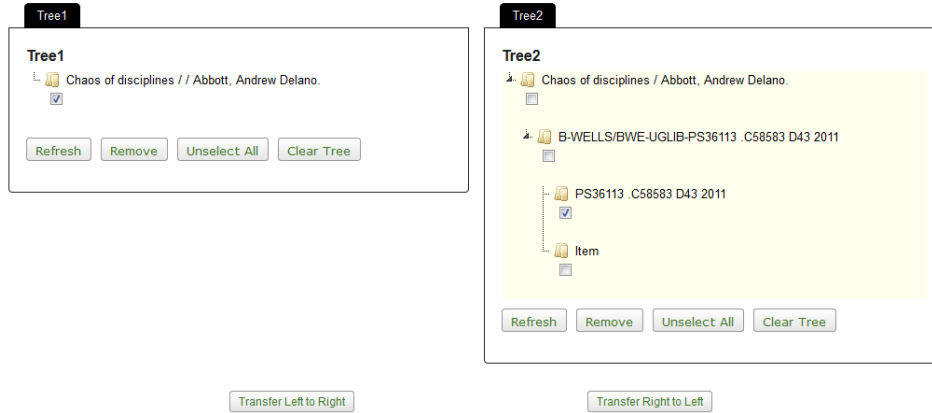
When the correct record is displayed, select it and click **Copy to Tree1**.

Search for the additional bibliographic records with which the OLE Instance or Item will be transferred.

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

 Click **View** to confirm the correct record. This feature may be revisited for 1.0.

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

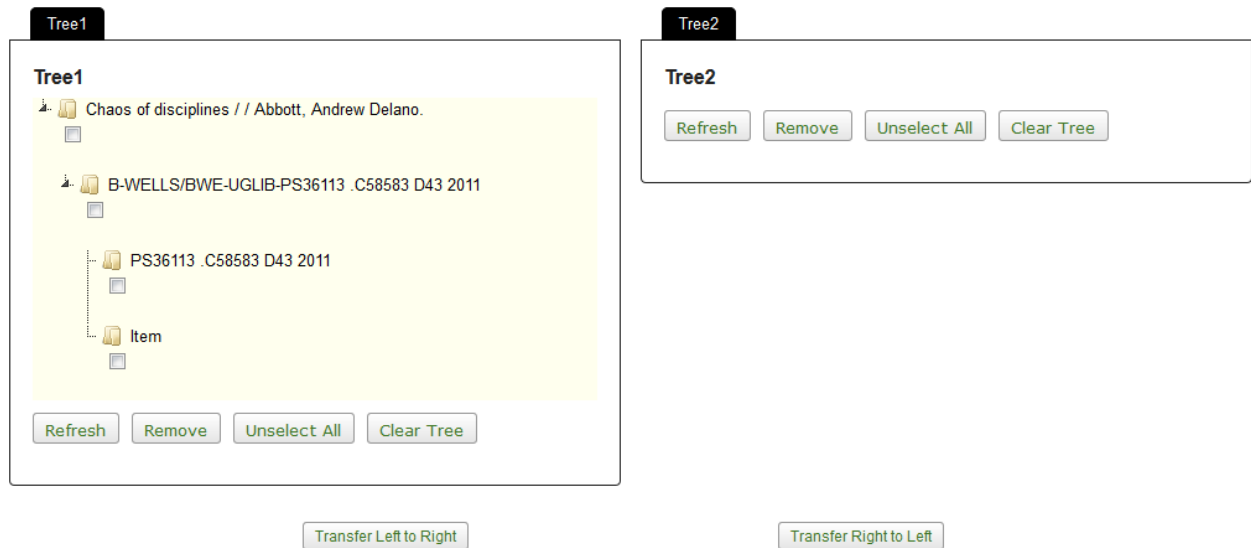


Click the appropriate button to transfer the Instance or Item from the left to the right or vice versa.

OLE will provide feedback of success or failure.

In the example above, the Instance record in Tree 2 is selected and will be transferred Right to Left to the checked Bibliographic description in Tree 1.


Instances transferred successfully



In 0.8, the bibliographic record from Tree 2 will be deleted if there are no additional instances associated with the record.

## Business Rules

1. An OLE Instance must have one Item record and may have many Item records.  
⚠ This rule is under review for future releases.
2. An Item record can only be transferred to an OLE Instance.
3. If the transfer of an Item record would result in an OLE Instance with no Item records, that OLE Instance will be deleted.

4. 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”).
  5. A Bibliographic Description must have at least one OLE Instance and may have many OLE Instances.
  6. An OLE Instance may only be transferred to a Bibliographic Description.
  7. If the transfer of an OLE Instance would result in a Bibliographic Description with no OLE Instance, that Bibliographic Description will be deleted.
  8. 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.
-  Work units are being defined for the 1.0 release.

# Discovery Export Profile

**Rice 2** > **Describe** > [Discovery Export Profile](#)

OLE does not provide a public discovery layer. As a result, there is a need to export bibliographic and Instance data to various existing discovery layers. The existing systems expect MARC21 bibliographic records with 9xx local data fields containing a subset of information from Instance records attached to the bibliographic records. OLE is working to be able to dump a full copy of the database. OLE will be able to suppress bibliographic or Instance data marked as staff only. OLE will be able to dump incremental updates with additions, modifications and deletions to bibliographic or Instance data as required by the library. OLE will allow the user to specify frequency of full and incremental exports.

The Discovery Export Profile will be used to export bibliographic and Instance data to public discovery layers on a timely basis. For the 0.8 release, much of the functionality has been stubbed however you can create export profiles.

## Document Layout

\* indicates required field

**Document Overview**

\* Description:

Organization Document Number:

Explanation:

---

\* Export Profile Code:

\* Export Profile Name:

Export Format:

Export Type:

\* Export To:

\* No of Export Threads:

---

\* Data Field:

* MARC Field	* Item Field	Description	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

**Notes and Attachments (0)**

**Ad Hoc Recipients**

**Route Log**

Cancel

### Discovery Layer Export definition

Title	Description
Export Profile Code	Required. The code to identify the export profile.
Export Profile Name	Required. The familiar title of the export profile.



Export Format	Select the format of the export from the dropdown menu.
Export Type	Select the type, service or batch job, from the dropdown menu.
Export To	The location the export will be sent to.
No of Export Threads	The number streams to be used for processing the export.
Data Field	Maps the item data that needs to be captured in the MARC record, for example 999
MARC field	Specify the tag to use for item data, for example  a.
Item Field	Specify the subfield for each holdings and item to be exported, for example Call number
Description	Provide a description note, for example oleHoldings callNumber number
Action	Add or delete lines as appropriate.

Profiles are available at <http://tst.docstore.ole.kuali.org/>, under the **Generate DocStore Dump** tab. To test the dump, you may copy and paste the xml into the **Export Profile xml** field and click **Submit**.

**Generate Docstore Dump**


Export Profile xml :

**Sample data for Ingest**


```
<exportProfile>
  <exportFormat>MARC XML</exportFormat>
  <exportType>Batch Job</exportType>
  <exportTo>/home/upload/docstore-datadump</exportTo>
  <noOfExportThreads>5</noOfExportThreads>
  <dataField>999</dataField>
  <exportMappingFields>
    <exportMappingField>
      <marcField>t</marcField>
      <itemField>itemType</itemField>
    </exportMappingField>
    <exportMappingField>
      <marcField>a</marcField>
      <itemField>Call number</itemField>
    </exportMappingField>
  </exportMappingFields>
</exportProfile>
```

Submit Clear

# Call Number Browse

**Rice 2** > **Describe** >  [Call Number Browse](#) > **Call Number Browse**

The following classification schemes are indexed and sorted in OLE: Library of Congress (LCC), Dewey Decimal Classification (DDC), National Library of Medicine (NLM), and Superintendent of Documents (SuDoc). The sort rules associated with these systems are based on the type of the classification scheme coded in the OLE holding record Call Number Type.

 **NOTE:** Local classification schema may also be coded. These schemas will, by default, be sorted character by character; if institutions require OLE to sort beyond character by character then this need will have to be identified and documented by each institution.

In order to find an appropriate classification number for a topic or similar items within the collection, OLE has the call number browse interface.

## Process Overview

Call up the **Call Number Browse** interface.

### Call Number Browse

Document Type:  Item  Holdings

Location :  Call Number Type:

Call Number:

#### Browse Results:

Show  entries

CALL NUMBER	LOCATION	TITLE	AUTHOR
BL2230 .J68 v.1 2010	ONLINE/BH-WILLKIE /I-DENTSTRY	Journal of Korean Religions.	
DS119.6 .J47 v.1 2006-2007 no.1	ONLINE/BH-WILLKIE /BH-FOSTER	The Jerusalem review /	
E175.5.A15 A3 2007 v.2 1988	BH-WILLKIE/BH-MCNUTT /BH-WRIGHT	The Americanist /	Aaron, Daniel,
Z1008 .E35 v.1 2006 no.1	BH-WILLKIE/BH-DREISER /I-UNIVLIB	Journal of the Edinburgh Bibliographical Society.	

Showing 1 to 4 of 4 entries

[Previous](#) [Next](#)

The **Document Type** is set to “Item” to account for enumeration but may be changed to “Holdings” if you wish to search only base call numbers.

Choose a **Location** from the dropdown menu to limit the search to a particular place.

Choose a **Call Number Type** from the dropdown menu to change the classification system.

Enter a **Call Number** to browse items that surround the entered number.


Click .

OLE is set to show 10 records but you may click the dropdown to show more results.

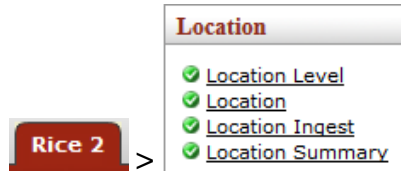
Select a call number to open the Instance Editor.

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

Select a title to open the Bibliographic Editor.

 For more information about Bibliographic Editors, see [Editor](#)

# Location Maintenance Documents



Location attribute maintenance e-docs are available via the Location submenu on the **Rice 2** menu tab.

Maintenance docs may be viewed by OLE users but only those in an administrative role may edit any of the e-docs.

## Location e-docs available from the Rice 2 Menu

Title	Description
<a href="#">Location Level</a>	Provides the location level data values for the OLE Instance document.
<a href="#">Location</a>	Provides the location data values for the OLE Instance document.
<a href="#">Location Ingest</a>	Interface that allows users to upload locations
<a href="#">Location Summary</a>	A search screen that allows you to review loaded files.

# Location Level

[Rice 2](#) > 
 [Location](#) > 
 [Location Level](#) > 
 **Location Level Lookup** > 
 **Location Level**

Locations are structured so that a location can be part of another location. The various levels that make up a location are named and structured in this maintenance document.

## Document Layout

### Location Level

<b>Document Number:</b> 3305	<b>Document Status:</b> INITIATED
<b>Initiator Network Id:</b> admin	<b>Creation Timestamp:</b> 10:20 AM 05/23/2013

\* indicates required field

#### Document Overview

<b>* Description:</b> test	<b>Explanation:</b>
<b>Organization Document Number:</b>	

#### Add/Edit Location Level

	Old	New
<b>Level Code:</b>	INSTITUTION	INSTITUTION
<b>Level Name:</b>	Institution	<input type="text" value="Institution"/>
<b>Parent Level Id:</b>		

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### Route Log

Cancel

The OLE Location Level document includes the **Add/Edit Location Level** 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 Location Level tab definition

Title	Description
Level Code	The code to identify location level
Level Name	Required. The familiar title of this location level
Parent Level ID	The level in the hierarchy above this location level

# Location

**Maintenance** > **Location** > **Location** > **Location Lookup** > **Location**

The goals of the location system are to:

1. Model the organization’s structure clearly and accurately.
2. Support storing configuration information at the appropriate level of the organizational structure.
3. Allow libraries to establish policies for a location that apply to the organization’s components. This makes administration easier.
4. Support modeling relationships between parts of the organization.
5. Support consortial models.

The general idea is that a location’s setting or policy will automatically apply to the location’s children, unless the children override the setting.

## Document Layout

### Location

<b>Document Number:</b> 3306	<b>Document Status:</b> INITIATED
<b>Initiator Network Id:</b> admin	<b>Creation Timestamp:</b> 10:22 AM 05/23/2013

[expand all](#) [collapse all](#)

\* indicates required field

### Document Overview

<b>* Description:</b> <input type="text" value="test"/>	<b>Explanation:</b> <div style="border: 1px solid gray; height: 30px;"></div>
<b>Organization Document Number:</b> <input type="text"/>	

### Add/Edit Location

	Old	New
<b>Location Code:</b>	BMU-IUPERFTAPES	<input type="text" value="BMU-IUPERFTAPES"/>
<b>Location Name:</b>	Blmgtn - Cook Music Library - IU Performances - Tapes	<input type="text" value="Blmgtn - Cook Music Library - IU Perform"/>
<b>Location Level:</b>	5	<input type="text" value="5"/>
<b>Parent Location:</b>	Blmgtn - Cook Music Library [B-MUSIC]	<input type="text" value="Blmgtn - Cook Music Library [B-MUSIC]"/>

### Notes and Attachments (0)

### Ad Hoc Recipients

### Route Log

[submit](#) [save](#) [blanket approve](#) [close](#) [Cancel](#)


The OLE Location document includes the **Add/Edit Location** 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 Location tab definition


Title	Description
Location Code	The code to identify the location of the Instance Record. Each location must have a unique code with a maximum length of 40 characters.

Location Name	Required. The familiar title of the location. Maximum length is 100 characters.
Location Level	Required. The numerical representation of the location hierarchy. Locally configured, valid values are 1-5.
Parent Location	If the location level is NOT 1, chose a parent location by clicking on the magnifying glass icon. A valid parent location must be at a higher level than the new location being created.


# Location Ingest

**Rice 2** > **Location** >  Location Ingest > **Location Ingest**

As an alternative to inputting locations manually, OLE allows users to load locations using an XML file conforming to a simple schema. The upload will collect data from a single XML file, parse it, and load the locations. The upload will match on location codes and create new locations for entries without a code, and update existing locations with a code.

 Location Ingest would most likely be used only during system setup or refresh or any time you need to batch load locations.

Once Locations are loaded, you may access them in OLE Locations.

 For more information about OLE Locations, see [above](#).

A sample location file that validates to our current coded schema is found at the OLE demo Web site: <https://wiki.kuali.org/display/OLE/OLE+Sample+Files+for+0.8>

## Process Overview

### Location Ingest

Location Upload:

1. From the **Location Ingest** screen, select a file to upload.

 You may need to pre-process files to match the schema.

2. Click the  button to process the file.

A success or failure message will appear above the upload field:

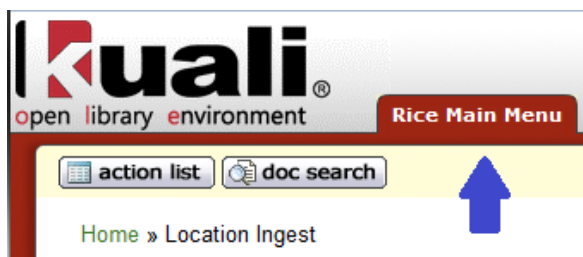


## Location Ingest

Location File Uploaded successfully with Total:6 ,Sucess:6 , Failure :0

Location Upload:

To review the summary, return to the **Rice Main Menu** and click on the **Location Summary** located on the **Location** submenu:



➔ For more information about the Location Summary, see [below](#).

You may also view locations from **Location** (also on the **Location** submenu).

➔ For more information about locations, see [above](#).


## Business Rules

Locations will be rejected if:

1. A location's parent location references a location that does not exist.
2. A location's parent location matches a location at a lower level of the location hierarchy.
3. A location's level code does not match a level code in the system.

Note that when loading locations that reference parent locations, the parent locations must already be in the system for the child locations to be created. If you try to load the child locations first, they will be rejected because OLE will not find their location codes. Users need to order the load file so that the parent locations come before the child locations, or load the higher-level locations before the lower-level locations.

# Location Summary

**Rice 2** > **Location** >  **Location Summary** > **Ole Location Summary Lookup**

The Location Summary stores uploaded files and allows users to review the xml files uploaded to OLE. It will also give basic information as to record creation, deletion and modification.

## Process Overview




From the lookup screen, click  to perform a blank search:

Home > Ole Location Summary Lookup

**Ole Location Summary Lookup**

Location Summary ID:

File Name:


  

Location Summary ID	File Name	No. of Total Record	No. of Created Record	No. of Updated Record	No. of Failed Record
1	DefaultLibraryLocations.xml	1733	1733	0	0
21	UChicLocations.xml	187	187	0	0
41	locations.xml	6	6	0	0

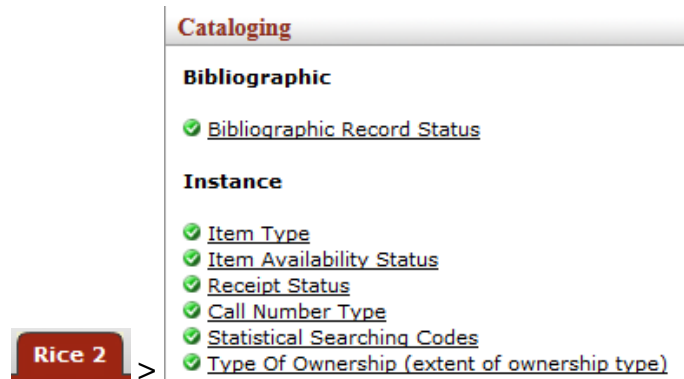
Showing 1 to 3 of 3 entries

The location summary search results will present users with the **Location Summary ID**, **File Name**, **No of Total Records**, **No. of Created Records**, **No of Updated Records**, **No. of Failed Records**.

You may now view locations from **Location**.

 For more information about locations, see [above](#).

# Cataloging Maintenance Documents



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

## Cataloging e-docs available from the Rice 2 Menu

Title	Description
<a href="#">Bibliographic Record Status</a>	Provides the status for a bibliographic record
<a href="#">Item Type</a>	Provides library item type data values. These are used in conjunction with patron type to determine a circulation policy for a particular item.
<a href="#">Item Availability Status</a>	Provides the item availability status that may be applied to OLE Instance documents.
<a href="#">Receipt Status</a>	Provides receipt status data values for the OLE Instance document.
<a href="#">Call Number Type</a>	Provides the shelving scheme data values for the OLE Instance document.
<a href="#">Statistical Searching Codes</a>	Provides statistical searching codes that may be applied to OLE Instance documents for reporting purposes..
<a href="#">Type of Ownership (extent of ownership type)</a>	Allows users to identify the type of information to be captured for the extent of ownership.

# Bibliographic Record Status

[Rice 2](#) > [Cataloging](#) > [Bibliographic Record Status](#) >

## Bibliographic Record Status Lookup > 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

**Bibliographic Record Status**

<b>Document Number:</b> 3240	<b>Document Status:</b> INITIATED
<b>Initiator Network Id:</b> admin	<b>Creation Timestamp:</b> 04:46 PM 04/17/2013

\* indicates required field

**Document Overview**

<b>* Description:</b> test	<b>Explanation:</b>
<b>Organization Document Number:</b>	

**Add/Edit Bibliographic Record Status**

	Old	New
<b>Bibliographic Record Status Code:</b>	None	None <input type="button" value="⊞"/>
<b>Bibliographic Record Status Name:</b>	None	None <input type="text"/>
<b>Source:</b>	System	System <input type="text"/>
<b>Source Date:</b>	03/22/2012	03/22/2012 <input type="text"/>
<b>Active Indicator:</b>	true	<input checked="" type="checkbox"/>

[Notes and Attachments \(0\)](#)  
[Ad Hoc Recipients](#)  
[Route Log](#)

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

# Item Type

[Rice 2](#) > [Cataloging](#) > [Item Type](#) > [Item Type Lookup](#) > [Item Type](#)

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

## Document Layout

### Item Type

Document Number:	3307	Document Status:	INITIATED
Initiator Network Id:	admin	Creation Timestamp:	10:37 AM 05/23/2013

[expand all](#) [collapse all](#)

\* indicates required field

#### Document Overview

* Description:	<input type="text" value="test"/>	Explanation:	<input type="text"/>
Organization Document Number:	<input type="text"/>		

#### Add/Edit Item Type

	Old	New
Item Type Code:	<input type="text" value="_BMABROW-B"/>	<input type="text" value="_BMABROW-B"/>
Item Type Name:	B-WELLS bookable browsing collection	B-WELLS bookable browsing collection
Item Type Desc:	<input type="text"/>	<input type="text"/>
Source:	IU SIRSI	IU SIRSI
Source Date:	03/22/2012	<input type="text" value="03/22/2012"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### [Route Log](#)

[submit](#) [save](#) [blanket approve](#) [close](#) [Cancel](#)

The Instance Item Type document includes the **Add/Edit Instance 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 Instance Item Type tab definition

Title	Description
Instance Item Type Code	The code to identify the Instance item type. Maximum length is 30 characters.
Instance Item Type Name	Required. The familiar title of the Instance item type. Maximum length is 100 characters.
Instance 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

# Item Availability Status

[Rice 2](#) > [Cataloging](#) > [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

### Item Availability Status

Document Number:	3242	Document Status:	INITIATED
Initiator Network Id:	admin	Creation Timestamp:	04:58 PM 04/17/2013

\* indicates required field

#### Document Overview

* Description:	<input type="text" value="test"/>	Explanation:	<input type="text"/>
Organization Document Number:	<input type="text"/>		

#### Add/Edit Item Availability Status

	Old	New
Item Availability Status Code:	AVAILABLE	<input type="text" value="AVAILABLE"/>
Item Availability Status Name:	Available	<input type="text" value="Available"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### Route Log

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.

# Receipt Status

**Rice 2** > **Cataloging** > **Receipt Status** > **Receipt Status Lookup** >  
**Receipt Status**

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

## Document Layout

### Receipt Status

Document Number:	3243	Document Status:	INITIATED
Initiator Network Id:	admin	Creation Timestamp:	05:02 PM 04/17/2013

\* indicates required field

#### Document Overview

* Description:	<input type="text" value="test"/>	Explanation:	<input type="text"/>
Organization Document Number:	<input type="text"/>		

#### Add/Edit Receipt Status

	Old	New
Receipt Status Code:	0	<input type="text" value="0"/>
Receipt Status Name:	Unknown	<input type="text" value="Unknown"/>
Source:	MFHD 008-06 http://www.loc.gov/marc/holdings/hd008.html	<input type="text" value="MFHD 008-06 http://www.loc.gov/marc/h"/>
Source Date:	03/22/2012	<input type="text" value="03/22/2012"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### Route Log

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



# Call Number Type

**Rice 2** > **Cataloging** > **Call Number Type** > **Call Number Type Lookup** >

## Call Number Type

The Call Number Type maintenance document defines what type of classification system is used. Some examples include Library of Congress, Dewey Decimal.

## Document Layout

### One Call Number Type

<b>Document Number:</b> 3309	<b>Document Status:</b> INITIATED
<b>Initiator Network Id:</b> admin	<b>Creation Timestamp:</b> 10:41 AM 05/23/2013

[expand all](#) [collapse all](#)

\* indicates required field

### Document Overview

<b>* Description:</b> test	<b>Explanation:</b>
<b>Organization Document Number:</b>	

### Add/Edit Call Number Type

	Old	New
<b>Call Number Type Code:</b>	LCC	LCC
<b>Call Number Type Name:</b>	LCC - Library of Congress classification	LCC - Library of Congress classification
<b>Source:</b>	MFHD 852 1st Indicator: http://www.loc.gov/marc/holdings/hd852.html	MFHD 852 1st Indicator: http://www.loc.ξ
<b>Source Date:</b>	03/22/2012	03/22/2012
<b>Active Indicator:</b>	true	<input checked="" type="checkbox"/>

### Notes and Attachments (0)

### Ad Hoc Recipients

### Route Log

[submit](#) [save](#) [blanket approve](#) [close](#) [Cancel](#)

The Shelving Scheme document includes the **Add/Edit Shelving Scheme** 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 Shelving Scheme tab definition

Title	Description
Shelving Scheme Code	The code to identify the shelving scheme. Maximum length is 30 characters.
Shelving Scheme Name	Required. The familiar title of the shelving scheme. Maximum length is 100 characters.
Source	Required. The hyperlink to the source of the shelving scheme.
Source Date	Required. The date for which the shelving scheme was retrieved from the source.

Active Indicator

Indicates whether the shelving scheme is active or inactive. Remove the checkmark to deactivate this code

# Statistical Searching Codes

[Rice 2](#) > [Cataloging](#) > [Statistical Searching Codes](#) >  
**Statistical Searching Codes Lookup** >  
**Statistical Searching Codes Maintenance**

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

### Statistical Searching Codes Maintenance

<b>Document Number:</b> 3245	<b>Document Status:</b> INITIATED
<b>Initiator Network Id:</b> admin	<b>Creation Timestamp:</b> 05:12 PM 04/17/2013

\* indicates required field

#### Document Overview

<b>* Description:</b> <input type="text" value="test"/>	<b>Explanation:</b> <input type="text"/>
<b>Organization Document Number:</b> <input type="text"/>	

#### Add/Edit Statistical Searching Codes

	Old	New
<b>Statistical Searching Code:</b>	ALFQUAR	<input type="text" value="ALFQUAR"/>
<b>Statistical Searching Name:</b>	__ALF quarantined items	<input type="text" value="__ALF quarantined items"/>
<b>Source:</b>	IU SIRSI	<input type="text" value="IU SIRSI"/>
<b>Source Date:</b>	05/04/2012	<input type="text" value="05/04/2012"/>
<b>Active Indicator:</b>	true	<input checked="" type="checkbox"/>

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### Route Log

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

# Type of Ownership (extent of ownership type)

[Rice 2](#) > [Cataloging](#) > [Type Of Ownership](#) > [Type Of Ownership Lookup](#) >  
**Type Of Ownership Maintenance**

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

### Type Of Ownership Maintenance

Document Number:	3246	Document Status:	INITIATED
Initiator Network Id:	admin	Creation Timestamp:	05:17 PM 04/17/2013

\* indicates required field

#### Document Overview

* Description:	<input type="text" value="test"/>	Explanation:	<input type="text"/>
Organization Document Number:	<input type="text"/>		

#### Add/Edit Type Of Ownership

	Old	New
Type Of Ownership Code:	Basic Bibliographic Unit	<input type="text" value="Basic Bibliographic Unit"/>
Type Of Ownership Name:	Basic Bibliographic Unit	<input type="text" value="Basic Bibliographic Unit"/>
Source:	(enumeration in schema) http://www.loc.gov/marc/holdings/hd008.html	(enumeration in schema) http://www.loc.
Source Date:	05/04/2012	05/04/2012 <input type="text"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### Route Log

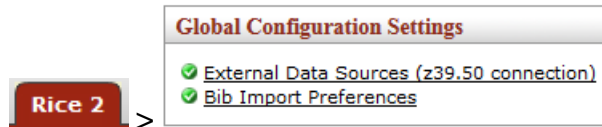
The Type of Ownership document includes the **Add/Edit Type of Ownership** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

#### Add/Edit Type of Ownership tab definition

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

| inactive. Remove the checkmark to deactivate this code

# Global Configuration Settings Documents



Global Configuration maintenance e-docs are available via the Global Configuration Settings submenu on the **Rice 2** menu tab.

## Global Configuration Settings e-docs available from the Rice 2 Menu


Title	Description
External Data Sources (z39.50 connection)	Will provide source information for the Import Bib from External Data Sources. (Not fully functioning for 0.8)
Bib Import Preferences	Interface in which users can create and modify user preferences for importing bibliographic records.

# External Data Sources (z39.50 connection)

**Rice 2** > **Global Configuration Settings** > **External Data Sources (z39.50 connection)** >

## External DataSource

As the **Import Bib from External Data Source** option is available to show the possibility for institutions to import bibliographic records through a Z39.50 protocol, this interface exists to support the functionality. This e-doc can be used to create and maintain the sources for the import.

 Users will need to implement the Z39.50 protocol before using this e-doc.

## Document Layout

### External Data Source

Document Number:	3250	Document Status:	INITIATED
Initiator Network Id:	admin	Creation Timestamp:	09:20 AM 04/18/2013
<a href="#">expand all</a>		<a href="#">collapse all</a>	

\* indicates required field

#### Document Overview

* Description: <input type="text" value="test"/>	Explanation: <input style="width: 100%;" type="text"/>
Organization Document Number: <input type="text"/>	

#### Add/Edit Data Source

Name:	<input type="text"/>
Description:	<input type="text"/>
Domain Name:	<input type="text"/>
Port Number:	<input type="text"/>
LogIn Id:	<input type="text"/>
Authorization Key:	<input type="text"/>
Password:	<input type="text"/>

#### Notes and Attachments (0)

#### Ad Hoc Recipients

#### Route Log

### Add/Edit Data Source tab definition

Title	Description
Name	The familiar title of the data source.
Description	The description of the data source.
Domain Name	Enter the web address of the data source.
Port Number	Enter the port number required for accessing the data source.
Login ID	Enter the login ID of the data source.
Authorization Key	Enter the authorization key of the data source.



Password

| Enter the password for the data source.

# Bib Import Preferences

**Maintenance** > **Global Configuration Settings** > **Bib Import Preferences** >

**Import Bib User Preferences** > **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

### User Preferences

**Document Number:** 3249    **Document Status:** INITIATED

**Initiator Network Id:** admin    **Creation Timestamp:** 08:49 AM 04/18/2013

\* indicates required field

**Document Overview**

**\* Description:**  Required

**Organization Document Number:**

**Explanation:**

**Add/Edit User Preference**

	Old	New
<b>Name:</b>	Admin Import	<input type="text" value="Admin Import"/>
<b>Import Type:</b>	New Import	<input type="text" value="New Import"/>
<b>Import Bib Status:</b>	None	<input type="text" value="None"/>
<b>Temporary Location:</b>	FORTWAYNE/FORMICROCARD	<input type="text" value="FORTWAYNE/FORMICROCARD"/>
<b>Permanent Location:</b>	B-LIFESCI/BLINDEXES	<input type="text" value="B-LIFESCI/BLINDEXES"/>
<b>Removal Tags:</b>	030,830,400	<input type="text" value="030,830,400"/>
<b>Protected Tags:</b>	050,245,100	<input type="text" value="050,245,100"/>
<b>Classification Scheme:</b>	LC	<input type="text" value="# - No information provided"/>
<b>Call Number Source 1:</b>	050	<input type="text" value="050"/>
<b>Call Number Source 2:</b>	065	<input type="text" value="065"/>
<b>Call Number Source 3:</b>	020	<input type="text" value="020"/>

**Notes and Attachments (0)**

**Ad Hoc Recipients**

**Route Log**

The User Preferences document includes the **Add/Edit 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 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.

# Appendix

- [Terms and Definitions](#)
- [Roles](#)
- [Linked Resources](#)

## DocStore and Editor Terms and Definitions


<b>Term</b>	<b>Definition</b>
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 multi-volume 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 it 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.
Ingest 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 ingested 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.
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.

 Sample users are provided for ease of testing in the 0.8 environment and can be replaced with local library users.

Role Name	Sample User	Functions/ Permissions
OLE Cataloging Admin	admin, admin 1	Initiates Cataloging maintenance documents
Shelving Location Administrator	dev1, dev2	System user who can create and edit permissions for shelving locations only (location level 5). Can view the locations of higher levels.
Location Administrator	admin, admin1	System user who can add and edit locations of any level. Can view, create, edit location maintenance documents and can view, edit the name of the location level maintenance document.
System Administrator (KR-SYS Technical Administrator)	admin	This role can create and edit Bibliographic Record Status maintenance documents
<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 Basics](#): E-docs, action buttons- basic overview of elements
- [OLE User Documentation](#) on the wiki
- [OLE Release Documentation](#) on the wiki
- [OLE Roadmap](#)