



USER DOCUMENTATION

Using the HOL Record to Store Local Tags – Version 16

Ex Libris

© Ex Libris Ltd., 2003

Version 16

Last Update: November 23, 2003

Table of Contents

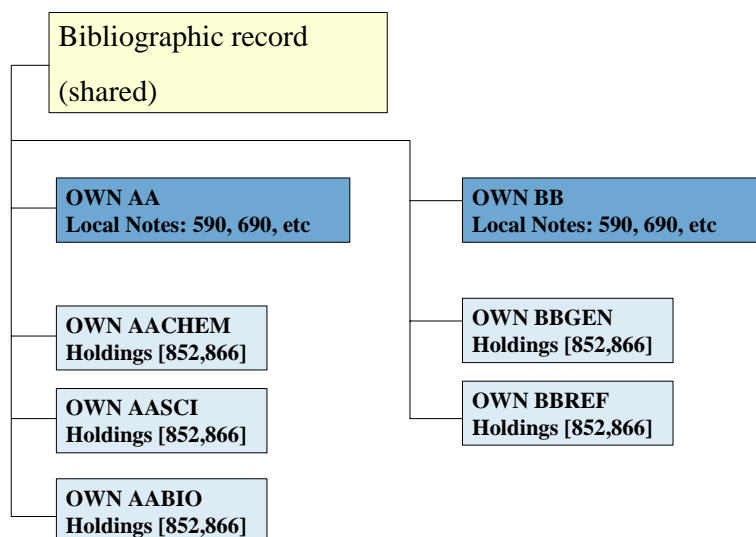
OVERVIEW	3
MOVING THE LOCAL TAGS INTO THE HOL RECORD.....	3
USING THE FIX IN THE CATALOGING CLIENT	5
USING THE FIX WHEN LOADING BIBLIOGRAPHIC RECORDS	5
EXPANDING THE LOCAL TAGS FOR OPAC DISPLAY.....	5

Overview

In ALEPH 500, libraries have the option of storing local tags in the holdings records that can be indexed and displayed as if they were part of the bibliographic record. The application for storing local tags in a holdings record is in a consortial environment where a single bibliographic record is shared by multiple institutions, and an institution would like to include local tags that not everyone will see. Which local tags are moved to the HOL record and which are displayed in the OPAC are configurable by the local institution.

Super-holdings

In the case where a single institution has more than one holdings record, a “super-holdings” record can be created which will store the local tags but not any particular call number or location information.



Display in OPAC

The local institution can configure which local tags are displayed in which logical base. For example, the library might choose to display BB's local tags in the XXX_BB logical base, and the AA's local tags in the XXX_AA logical base, and neither of them in the global catalog.

Moving the Local Tags into the HOL Record

There is a fix_doc that will move specified local notes from the bibliographic record into a holdings record based on configuration tables. The tables involved are:

1. xxx01/tab/tab_fix:

```
! 1                2                3
!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
HOLD  fix_doc_create_hol_local_notes tab_fix_local_notes.conf
```

HOLD is the "section" for tab_fix. You can use this in any procedure that asks for a fix — for example, loading records, the OCLC server, the cataloging client, etc. TEST is the section in tab_fix_local_notes.conf to use:

2. xxx01/tab/ tab_fix_local_notes.conf:

```
[Main]
local notes = 590##,690##
owners subfield = 9
owners list = AA,BB,LIN
merge section = 98
mapping section = LCN-2-HOL
```

This section specifies that tags 590 and 690, all indicators, with owner specified in 590 \$9 or 690 \$9, for owners CP, BC and LIN, will use the section 98 from xxx60/tab/tab_doc_merge, and the section LCN-2-HOL from xxx01/tab/tab_mapping. Note you can specify all the tags you like here, and all the owners you like.

3. xxx60/tab/tab_merge_overlay:

```
98 1 Y #####
98 2 Y 590##
98 2 Y 690##
```

This is similar to the OCLC setup. This line indicates that you take everything that used to be in the record (if one used to exist) and then also take 590 and 690 from the incoming record (representing the new tags created).

4. xxx01/tab/tab_mapping

```
LCN-2-HOL      541## abcde 541   abcde          Y Y
LCN-2-HOL      541## fho39 541   fho39         Y Y
LCN-2-HOL      561## ab39  561   ab39          Y Y
LCN-2-HOL      590## ab9   590   ab9           Y Y
LCN-2-HOL      690## ab9   690   ab9           Y Y
```

This tells you how to map the original tags from the bib into the new tags in the super-holdings record. Most can be mapped to the same tag, but we can create the OWN tag with one of these lines.

5. xxx01/pc_tab/cataloging/fix_doc.eng

This puts the fix in the cataloging client for testing on individual records. The fix is run using Edit - Fix Record. Then choose the fix called "Create Holdings Record (run HOL fix)", at the bottom of the list.

Using the Fix in the Cataloging Client

1. Have a record open in cataloging that has local tags as defined above. Following is an example.

```
590 $a my first subfield $b my second subfield $9 AA
690 $a example subject $b example subject $9 AA
690 $a my first subject subfield $b my second subject subfield $9 BB
```

2. From the Edit menu, choose Fix Record, choose the "Create Holdings Record (run HOL fix)" choice. The above example will create two holdings records.

Holdings Record 1:

```
OWN $a AA
590 $a my first subfield $b my second subfield
690 $a example subject $b example subject
```

Holdings Record 2:

```
OWN $a BB
690 $a my first subject subfield $b my second subject subfield
```

3. To see the holdings records, choose File - Load HOL records from server. The two new HOL records will show the OWN tag in the selection box. **These changes do not take effect until you save the record to the server.**

4. The original bib record had the original tags taken out, but **these changes do not take effect until you save the record to the server.** If you just close the record and reopen it, the 590 and 690 tags will still be there.

Using the Fix When Loading Bibliographic Records

This fix can be used in any bibliographic loading environment. Simply specify the fix section in p_manage_18.

Expanding the Local Tags for OPAC Display

This expands the local notes created with the super-holdings fix (or other notes in the HOL record) in the bib. The tables involved are as follows:

1. xxx01/tab/tab_expand

In the WEB-FULL section, there is no parameter in column 3, because the web will consult tab_base.conf for the appropriate base that is being searched.

```
WEB-FULL    expand_doc_bib_local_notes
```

If you want to check the expansion in util-f-4, put a base name in the third column of tab_expand.

```
U39-DOC    expand_doc_bib_local_notes    XXX01
```

Including the expand in the WORD section of tab_expand will use the tab_base.conf configuration for indexing.

```
WORD       expand_doc_bib_local_notes    XXX01
```

2. xxx01/tab/tab_expand_local_notes.conf

tab_expand_local_notes.conf defines the owner codes for the holdings records to display local tags in the OPAC. In the example below, XXX01_AA will display the local tags that are in the holdings records with OWN tags AA only. XXX01_PUB will display local tags for both AA and BB owners.

```
[XXX01_AA]
  owners list = AA
  owner tag = OWN
  owner subfield = a
  owner alternative tag = 590,690
  owner alternative subfield = 9
  mapping section = LCN-2-BIB
```

```
[XXX01_PUB]
  owners list = AA,BB
  owner tag = OWN
  owner subfield = a
  owner alternative tag = 590,690
  owner alternative subfield = 9
  mapping section = LCN-2-BIB
```

Most of these are self-explanatory. You can specify which tags you want to expand, and which owners for each base. The mapping section refers to xxx01/tab/tab_mapping.

3. xxx01/tab/tab_mapping

LCN-2-BIB	541##	abcde	LCN	abcde	Y	Y
LCN-2-BIB	541##	fho39	LCN	fho39	Y	Y
LCN-2-BIB	561##	ab39	LCN	ab39	Y	Y
LCN-2-BIB	590##	ab9	LCN	ab9	Y	Y
LCN-2-BIB	690##	ab9	LCS	ab9	Y	Y

These are my own tag names, you can choose your own. At any rate, if you have a 590 in the holdings record, you will create an LCN in the bib record. This LCN is a virtual tag but can be used like any other expanded tag, for example, in indexing or display.

4. xxx01/tab/edit_doc_999.eng

## LCN##	D	L	Local	note	exp	Y	E	W
## LCS##	D	L	Local	subj	exp	Y	E	W

Displays the expanded local tags in the Web Full screen.

5. xxx01/tab/tab11 (word)

11	W	LCN##	04	WRD
11	W	LCS##	04	WRD

Puts LCN and LCS in the keyword index.