

axiell

Axiell Collections
model applications 5.2
release notes





Axiell ALM Netherlands BV

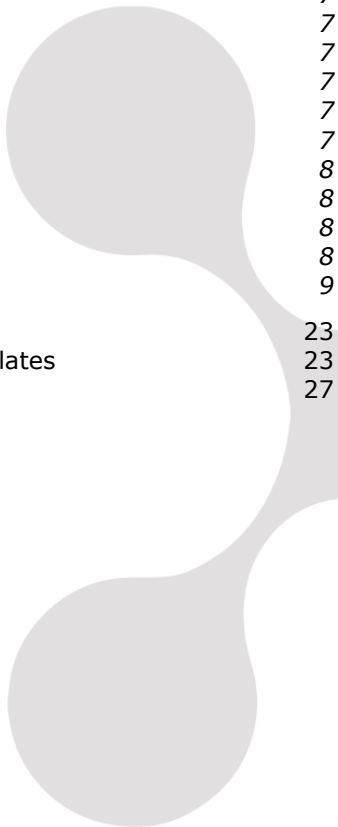
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1 A brief list of the major changes

Version 5.2 of the Axiell Collections model applications (previously known as the Adlib model applications) has been developed for Axiell Collections (version 1.19 and up) only and requires SQL Server 2019 or higher. We recommend always using the latest Axiell Collections core software release available, regardless of the Collections model application version you have.

Note that a new model application is not the same as a new Collections (core software) version. The latter is easy to install, similar to installing updates of other software on your computer. It introduces new functionality and fixes bugs. A new model application on the other hand, means new and changed database structures, screens and application structure. It usually also means that your data has to be migrated, which is a complicated process. If a core software update is like buying a new tv or a new chair, then an application upgrade is like moving house: you probably don't want to do it if you're happy with your current dwelling.

Besides many small improvements, model applications 5.2 contain quite a few major changes too:

- **Managing uploaded output templates:** Axiell Collections allows custom Word or Excel templates uploaded through the *Output formats* dialog to be stored on the server automatically. In model application 5.2, the stored template will then become available (initially under its file name) in the *Output formats* dialog too, so next time this Word template is needed for printing, the user can pick it straight from the *Output formats* dialog and won't need to upload it again.
For every uploaded template, even if the user uploaded it before, a matching record will now be created in the new *Uploaded templates* data source. In there, the application manager or the user can manage the list of uploaded templates as it appears in the *Output formats* dialog: you can change the visible titles, determine which users should have access to which uploaded templates or hide certain uploaded templates permanently. See chapter 3.1 for more information.
- **Changes in PID handling:** The registration of Persistent Identifiers (PID's) has been reviewed and simplified. This concerns all data sources, except Maps, Missions, Mission items, Registration/synchronisation queue Permanent ID's, User activity logs, and the database Temporaryprinttags.



The reason for the change is that it was not clear how to use the old setup. Especially the concept of the Work PID was difficult to get to grips with.

In the new setup, there are generally two kinds of PIDs. The (meta)data PID identifies the current record. This PID can be managed via brokers like Handle or SurfSARA to link a persistent URI to a local URL. There can only be one (meta)data PID. All other PIDs identify other entities than the current record (e.g. information sources) and are recorded in the *Other identifiers* section. These PIDs can not be submitted to brokers, since they are not managed by the local organisation.

The *Other PIDs* field group now replaces the *Source* registration fields which were present in the data sources *Persons and institutions*, *Thesaurus* and *Geographical thesaurus*. When information in the current record is derived from another source, the *Other PIDs* field group allows you to register the source name and ID (be it a URI or not), as well as the *Date* and *Time* of assignment.

A third kind of PID is only used in the *Multimedia documentation* data source: the media PID. The media PID identifies the actual media asset (the digital file) described in the current media record. Since this media asset is managed by the local organisation, the media PID, like the metadata PID, can be managed via a broker.

To add URIs and URLs to existing records in bulk for marked records (without ever having to configure the relevant fields in Designer), an *Assign PIDs* task is now available in all data sources with PIDs. However, prior to using this task, appropriate URL and URI formats need to be set in the *TaskAssignPIDs.txt* file in the `\texts` sub folder of your Axiell system.

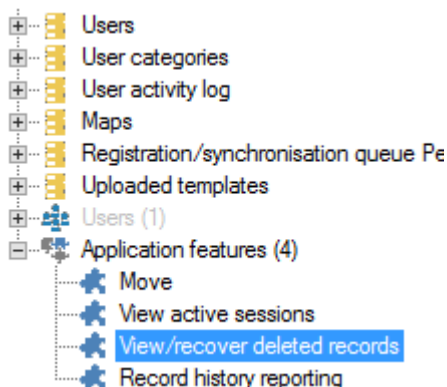
More details about the new setup can be found in chapter 3.2.



2 A summary of all minor changes

General

- A number of old Adlib adapl-only output formats have been made compatible with Axiell Collections and are now included in the model applications 5.2, namely:
Thesaurus and Geographical thesaurus: *Thesaurus listing, Generic thesauruslist (with tree structure)*; Multimedia documentation: *Photo listing without objects, Photo listing with objects*; Exhibitions: *Exhibition listing*; Assessments and treatments: *Extended conservation listing*; Incoming loans and Outgoing loans: *List of loans*; Currencies: *Currency list*; Series: *Listing with all fields*; Taxonomy: *Complete taxonomic record*; Serial subscriptions: *Brief list of serials, ISBD list of serials*.
- Model applications 5.2 allow you to make the features Axiell Move, Active sessions, Journal maintenance, and Record History Reports available to specific user groups, besides \$ADMIN users. You can do that by editing the roles/access rights for the so-called “application features” with these names (listed underneath the data sources in the application .pbk) in the Designer Application browser.



The Move application feature has access rights \$REST = Full by default. This enables the Collections *Axiell Move* menu option for all users who have access to the mission and missionitem databases (to which access is restricted by default).



- The inline report *All fields overview* has been updated to always display field names, tags and occurrence numbers, to support multilingual fields, and to also display UI language values for enumerative fields.
- In e-mail fields new 'mailto:' functionality has been implemented so that clicking an e-mail address in a record opens a new e-mail for that address. (Technically these are now an Application field with Retrieval type = Public URL and Retrieval path = <mailto:%data%>.)
- Contextual Help texts (the data entry help for fields and such) have been cleansed of needless references to the old Adlib software, a number of outdated help texts have been updated and some new help texts were added. Also, previously (in preceding 5.x applications) hidden help texts for library catalogue fields have been made available again.

Catalogue

- By default, all Catalogue data sources now display the Media image in the Result set and the Gallery views. The Gallery view now shows similar catalogue record information as the Hierarchy browser and the Related records view.
- The display of Hierarchical relations on the detail screen tabs has been improved: the layout has been reviewed; for a clearer overview, merge fields on parent and child records are now only displayed when filled; in all catalogues a new additional tab allows to display child records in a table grid view.
- The display of Related catalogue records on the detail screen tabs has been improved: all catalogues now use the same tab *Related material*. In the Archives and Accessions catalogue the *Related catalogue record* fields have moved away from their original screen tab to this tab; some field labels have been generalised to match with all of the catalogues; the related record's Document type is now also displayed; the screen tab layout has been reviewed; for a clearer overview, merge fields on related records are now only displayed when filled; in all catalogues, a new additional screen tab makes it possible to display related catalogue records in a table grid view.
- The 'Documentation'-relation between Object catalogue and Library catalogue records (re-introduced in 5.1 as a 'hidden' relation, to be activated on request in that application version) has now been made fully available, for all catalogues (except the Library catalogue itself).



This reverse relation, involving the linked fields *documentation.title* (ti) and *documented_material.object_number* (iN) is now the official successor of the Collect-Document relation which was offered in the Object and Archives catalogues of pre-5.x applications: on the library side of the link, the field and group names have been reviewed (note that **API/AIS implementations might be affected**, since field and group names have changed!); on the library side of the link, the detail screen displaying the linked Catalogue records now also displays their dataset and Record type.

- In addition to the link to Library catalogue records, the pre-5.x free-text Documentation Note field has also been re-introduced, as *documentation_free_text* (tag dt). While in the 5.0/5.1 versions the *related_material.free_text* (LR) field was used for free-text notes on all related material, 5.2 again offers a dedicated documentation notes field: in the Archives catalogue, the Publication Note (LR) field on the Allied materials screen tab has been replaced by the Documentation Description (dt) field on the Documentation tab.
- The Catalogue no longer has any effectively restricting Record type access rights defined in the database for any fields. All fields are available for all Record types (on database level), but the Collections user interface ensures that only the relevant fields are displayed.

For many fields, Record type access rights are still defined, but they duplicate the Record type access rights set on database level, so they do not effectively restrict any access. These duplicating field-level rights might be deleted in future application versions.

Library catalogue

- The *object_number* (IN) field is now consistently labelled as *Catalogue number*.
- The Catalogue number (IN) field is now displayed on all Library zoom screens.
- The primary fields Management status (ms) and Institution name (BA) are now also displayed on the Catalogue card screen.
- For Cartography records, the Parallel title field (ZJ) (and its article field) has been deprecated. Parallel titles should now be registered in additional occurrences of Title (TI).
- In Article records, the Source title's Document type is now displayed.



- In Serial records, the Continuation history fields (YC, YF) are now displayed on a separate screen tab, and also show the Publication year of linked records. The fields now link on Title, instead of on Catalogue number. Linking on title is more user-friendly.
API/AIS implementations might be affected, since the linked fields have changed, the old linked fields have been deprecated, and the link reference field name has changed.
- The handling and display of the Hierarchical relations fields has been improved: the Hierarchical relations are now available for all Document types, also for Games and resources; the fields now only allow to create links between library Work records, using tailored link and zoom screens. Links to library Items should be created using the Create items task, this is explained on-screen. Items are linked to a Work during creation, and typically will stay linked to that Work during their lifetime; for a clearer overview, merge fields are now only displayed when filled; for broader library Works, and narrower library Works or Items, the Document type is now displayed; for linked Items, the Holding and Missing information is now displayed; a new additional screen tab makes it possible to display child records in a table grid view.
- For Works and Items a non-linked Shelf mark (av) field is re-introduced. This field is now the official successor of the Document database Shelf mark (si) and Copies database Shelf mark (ey) fields as offered in the pre-5.x applications: for Works, the new field is displayed on the screen tab *Hierarchical relations | Shelf mark | Copies* and on the Catalogue card, while for Items, it is displayed on the *Copy details* screen tab; for Works, the link to the Locations database (to store shelf marks) is now deprecated, and the corresponding screen tabs have been removed, while for Items, the link to the Locations database remains, to record physical storage locations (so no shelf marks) in the same way as can be done in other parts of the catalogue; the Library reports have been adjusted to include the new field as shelf mark; the Create items task has been adjusted to process the new Shelf mark (av) field instead of Normal location (NL); everywhere a library Work's Normal location was merged in, now the new Shelf mark field is merged in; **API/AIS implementations might be affected**, since the names of shelf mark merge fields have changed (Collect: oN, z2, si; Exhibit: si)
- The *Exhibitions, auctions, collections* screen tab has been split into a *Documented exhibitions and auctions* tab and a *Collections* tab. The relation with exhibitions and auctions is about the library Work being documentation on the exhibition or auction. The relation with collections is about the library Work being part of a col-



lection. This difference in the nature of the relations is more clearly expressed in the new screen tab labels.

- The *Reading room requests* and *Purchase orders* screen tabs are now only displayed when they contain data.
- In an Item record, it is no longer allowed to remove the Work link, other than deleting the Item record altogether; the Work link is a mandatory field. Although not likely needed, it stays possible to replace an Item's Work link by a link to another Work.
- The Create items task now states clearly that it only works for 1 Work record at a time. Also the screen layout has been improved.
- The pre-5.x report *ISBD listing of Works, incl. hierarchical relations* output format has been made available.

Links to the Catalogue (in all data sources)

Link scope

For Catalogue-linked fields in all data sources, the link scope has been reviewed, in order to ensure that only relevant records can be linked. In case of a reverse link, only those catalogue records are relevant that offer a field for the return link.

The link scope has been limited where needed using a linked dataset specification and/or a link search filter.

Forcing

For Catalogue-linked fields in all data sources, forcing records into the Catalogue has been disabled where it was still allowed.

The reason is that almost all catalogue-linked fields are only allowed to link to specific catalogue datasets, Record types, and/or Document types, and this can not be enforced during forcing. Also, most catalogue records require a Record type and/or Document type to be added during the creation of the record, in order to work properly; this additional data can not be added during forcing.

Availability in Related records view

For Catalogue-linked fields in all data sources, it has been ensured that the link can be navigated both ways in the Related records view. There are two exceptions though:

- The hierarchical relations within the Catalogue itself; these are displayed in the Hierarchy browser instead



- The Catalogue references in the data sources Missions and Mission items; the potential number of related Mission items in a Catalogue record could be too high to effectively display, and the display of this particular relation is not very relevant. The relation could still be added as a customisation.

Display of linked and linkable catalogue records

For Catalogue-linked fields in all data sources, the presentation of linked Catalogue records has been reviewed, in order to display relevant identifying information in a consistent way:

- For fields linking to Library records on title, a selection list format string now shows the Document type and Title article, in addition to the title itself.
- Link screens (presented as the *Find data for the field ...* window) now generally display the same identifying Catalogue fields, in the same order, with consistent column labelling (see the next bullet for the field list). For individual link screens, irrelevant fields might have been left out, or additional relevant fields might have been added.
- The Hierarchy browser's and Related records view's format strings (to display linked catalogue record's content) have been made more consistent and better readable, using pipes ('|') to separate fields in preference of slashes '/'. The default format string now consists of:

```
<Dataset>: <Catalogue no.> [<Record type>|<Document type>] | <Title article> <Title> | <Creator><Author> <Corporate author> | <Object type/Form> | <Search Year> | <Date (from)> = <Date (to)>
```

In tags:

```
%ZY%: %IN% [%Df%|%df%] | %Ta% %TI% | %VV%%ya% %yc% | %OB% | %Ya% | %DS% = %DE%
```

For specific links, irrelevant fields might be omitted, or selected fields might be added.

Locations and containers

- It is no longer possible to create a new location or container record from a field that links to the Locations database. Some fields, particularly in Change location tasks, still allowed this, but this option makes it impossible for the user to choose whether the new record must be a location or a container.



Assessments and treatments

- The related catalogue material is now displayed in a compact table grid view.

Exhibitions

- The display of linked documentation has been improved.
- The exhibited catalogue material is now displayed in a compact table grid view.

Item requests

- The Help text for the Standard search *Issued and overdue* fixed query has been adjusted to be compatible with Collections 15.1.
- For requested Library items, the Shelf mark is now displayed.
- For requested Library items, the item detail fields are now only displayed when the details are actually available. The display layout and some field labels have been reviewed.

Library purchase orders

- The *Order item* screen tab now displays the Catalogue item's Catalogue number and Document type.

Loans (Incoming/Outgoing)

- The *Correspondence* screen tab has been reviewed. It has been renamed to *Documents and correspondence summary* and some field labels have been changed for better display. The correspondence related to a specific object has been moved to a separate box on the screen, where the Object number is also displayed. For incoming loans the object-related condition report has been added.

Media

- Uploading an image now also extracts the image's metadata and stores it in the Media record.
- The field Publish on web (wp) is now indexed and available in Standard search.
- The field Publish on web (wp) is now available on the Media zoom screen.
- The screen tab with linked Catalogue records has been reviewed to reflect that all kind of catalogue records can be linked: the



screen now shows more catalogue record information when applicable, namely the Record type, Document type, Title article, Author and Corporate author; an alternative screen has been added that shows the linked catalogue records in a table grid view; the Catalogue link field's data dictionary field names have been changed from *object.** to *catalogue.**, to reflect that all kind of catalogue records can be linked, and also the field group name has been changed from *Object* to *Catalogue*. **Note that API/AIS implementations might be affected by these name changes!**

Serial subscriptions

- The Bibliographic details screen tab now displays all occurrences of the Title merge fields, e.g. Author, Publisher, etc.
- The Bibliographic details screen tab now displays Holding and Missing information of the Title.
- On the Booking screen tab, the Remarks (Missing issues) (on) field has been removed. This field still existed because the old Adlib Subscription module could also be used stand-alone, without a catalogue database. In the 5.x setup, Missing in holding data should be registered in the catalogue, not in the subscription record.

Transport

- The function to change the current location of the linked objects to the Destination (D4) recorded in the Transport record has been removed. **Note that API/AIS implementations might be affected, since the `change_location (D5)` and `change_location.date (D6)` fields have disappeared!**

Use of collections

- The related catalogue material is now displayed in a compact table grid view.

Users

- A logical (checkbox) Mailing list field has been added for indicating that a user wants to receive mailings. The field was added on behalf of the Arena integration.



Fixed issues

General

- The following errors reported by the Designer Application tester have been addressed: indexes without field definitions; mismatch in repeatability between screen and database fields.
- The following warning reported by the Designer Application tester has been addressed: duplicate field names in other languages than English.
- The Record owner type has been checked to be set to *Current role*: in a few databases it was still set to *Current user*.
- The *schemas.json* file (to overrule specific default database names used by Collections) is now prepared for an Enterprise application implementation (it uses the database's default dataset for all schemas).
- In brief displays, any outdated Adlib "parameter" screen elements (aka List fields) have been replaced by regular field definitions.
- Field conditions defined using an outdated technique have been removed or redefined.
- Incidental correction of typing errors.

Catalogue

- The default Result set field selection has been made consistent with the Catalogue link screens. The Result set fields are now read-only, since editing them could result in invalid records.
- The Record type (Df) field was repeatable on database-level, although it could never be repeated on screen: this has been fixed.
- Field group Parts: Fix of incorrect Record type access rights.
- The merge field Related field collection Place feature (f9) was not grouped correctly: this has been fixed.

Moving image catalogue

- The default Result set field selection has been made consistent with the Catalogue link screens. The Result set fields Record type



(Df) and Date (DS, DE) are now read-only, since editing them could result in invalid records.

- The fields names of the Item (part) fields Stock (c7) and Stock Notes (p4) have changed, to avoid duplicate field names. **Note that API/AIS implementations might be affected by this name change!**
- The Event link fields previously allowed to create new Event records without the mandatory Event Type (ET). This has been fixed: it is no longer possible to create new Event records from the Catalogue.

Object catalogue

- The default Result set field selection has been made consistent with the Catalogue link screens.
- The fields names of the Field collection link fields were not consistently prefixed with *field_coll.association.**. This has been fixed: the names of tags FR, Fr, and w4 have been changed. **Note that API/AIS implementations might be affected by this name change!**

Archive catalogue

- The default Result set field selection has been made consistent with the Catalogue link screens.
- In the *Change retention reference* task screen the link window on the Retention reference field could not be opened: this has been fixed.
- Both in the “Bulk create” interface and in the *Extended archive record listing* report the display of the broader record’s level value did not work: this has been fixed.

Library catalogue

- The default Result set field selection has been made consistent with the Catalogue link screens. The Result set fields record are now all read-only (except Title and title Article), since editing them could result in invalid records.
- The Record type (Df) field was still editable on Library zoom screens: this has been fixed.



- The Document type (df) field was not always displayed on a detail screen or a zoom screen: this has been fixed.
- The Document type (df) field was still editable in existing Library records: this has been fixed. The field is only editable during the creation of a new record, before any other field is filled.
- The Document type (Df) field was repeatable on database-level, although it could never be repeated on screen: this has been fixed.
- In Books records, the field Institution name (BA) disappeared when the Management status (ms) was set to 'internal'. This has been fixed.
- In Books and Article records, the field Illustrator Role (Yk) was not displayed: this has been fixed.
- In Article records, the Source title's Article (yQ) merge field was editable: this has been fixed.
- In Game records, the (Imprint) Number (Y2) field tried to start a non-existent ADAPL procedure: this has been fixed.
- In Book and Cartography records, on the Historical objects screen tab, the Dutch label for the Dedicator field has been corrected, as well as a typing error in the French field name.
- In Book, AVM, and Cartography records, an ISBN Price (VQ) field was presented on the Series, notes, ISBN screen tab, but the application does not contain such a field. The field has therefore been removed from screen. The tag VQ is actually the tag of the Item-level field acquisition.price.value (VQ), and should not be used in Work records at all.
- The Subject term code (ye) field is now merged in from the linked Thesaurus record. The field was intended to work like this, but accidentally it was implemented as a local editable field.
- In Game and Resource records, linked Items were not displayed: this has been fixed.
- For linked Exhibitions, the merged-in Value place was not displayed correctly: this has been fixed.
- For linked Auctions, the merged-in fields Auctioneer (Ys) and Commissair priseur (YA) were incorrectly labeled in some languages (English, German, Arabic, Italian, Greek, Swedish). Field (Ys) is designed to hold the Auction house, and field (YA) is designed to hold the Auctioneer. The field's labels and database field names have now been corrected accordingly. **Note that API/AIS**



implementations might be affected by the field name change!

- On the Catalogue card screen tab the ISBD-presentation format was not correctly chosen for the document type: this has been fixed.
- On the Catalogue card screen tab the ISBD-presentation did not correctly display the Imprint fields: this has been fixed.
- On the Catalogue card screen tab the ISBD-presentation did not display the ISBN number for AVM records: this has been fixed.
- The task Raise Item Request did not work when the Catalogue number (IN) contained a space character: this has been fixed.
- ADAPL reports now only process Work records, since they were designed to report Work record data. Item records are ignored. The report labels have been adjusted to communicate this.
- ADAPL reports did not process the information about linked Items correctly: this has been fixed.
- The pre-5.x Extended ISBD listing of Works and their copies report did not process the different Document types correctly: this has been fixed.

Accessions

- The default Result set field selection has been made consistent with the Catalogue link screens.

Accessories

- The default Result set field selection has been made consistent with the Catalogue link screens.
- The field Object name (OB) incorrectly did not use any link domain: this has been fixed. The link domain is now identical to that in the Object catalogue.

Acquisitions

- The Saved search functionality was not available. This has been fixed.



- The Status (as) field was editable on screen, although any entered value was always overwritten by a calculated value. Now the field is read-only on screen.
- The Outcome date (oa) field was set to "Mandatory in group" but this was irrelevant: the setting has been removed.

Assessments and treatments

- The fields Reversible (RC), Condition description (RO), Plan (RN) and Material (RE) were not hidden for the Procedure type (RT) "check/assessment". This has been fixed.
- The Reason (RU) field was not hidden for the Procedure types (RT) "conservation" and "restoration". This has been fixed.
- A new screen tab has been added for the Hours and Costs fields (eh, ec, dc, ah, ac, bc). These fields were not available on screen anymore since application version 5.0.
- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.
- The *Extended conservation listing* output format, previously available for Adlib, has now been made available for Collections.

Auctions

- The fields Auctioneer (V4) and Commissair priseur (VP) were incorrectly labeled in some languages (English, German, Arabic, Italian, Greek, Swedish). Field (V4) is designed to hold the Auction house, and field (VP) is designed to hold the Auctioneer. The field's labels and database field names have now been corrected accordingly.
Also field (V4) used the exclusive link domain AUCTIONEER: this link domain has been renamed to AUCTION_HOUSE. **Note that API/AIS implementations might be affected by the field name change!**
- For linked Catalogue records, the merge field Article was editable. Also there were write-back fields defined. This has been fixed.

Collections review

- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.



Currencies

- The *Currency list* output format, previously only available for Adlib, has now been made available for Collections.

Events

- The Result set allowed to fill fields in a record that were not available for that record's event type. This has been fixed. All default Result set fields are read-only now.
- It was possible to change the Event type (ET) value for existing records. That could lead to inaccessible fields. This has been fixed; the fields is now read-only on the brief display, on all detail screens (except the one for creating a new Event record), and on all zoom screens.
- In Award and Publication event records, the Occasion (bt) field allowed to find event records that could not be linked. This has been fixed.

Exhibitions

- In the Result set, the calculated fields Exhibition start date (T1) and Exhibition end date (T2) were editable. This has been fixed, the fields are read-only now.
- The English field name action.date.eind (DS) has been corrected to action.date.end. **Note that API/AIS implementations might be affected by this name change!**
- In the Library catalogue link (tab Documentation), the backward reference was missing: this has been fixed.
- For linked Catalogue records, the merge field Article was editable. Also there were write-back fields defined. This has been fixed. The obsolete Document dataset selection field (FE) has been removed.
- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.



Field collection

- The fields `field_collection_place.context` (YM) and `field_collection_place.GIS` (jl) were not set to inheritable, while they are part of an inheritable group: this has been fixed.
- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.

Geographical thesaurus

- In Standard search, the Status field help text for English was in fact in German, this has been corrected.
- The internal relation fields all used the Thesaurus zoom screen, instead of the Geographical thesaurus zoom screen: this has been fixed.
- The non-operational, incorrect and outdated suppress conditions for the Period start/End date fields (`ps`, `pe`) have been removed.
- In the Media link, the Original file name (`ob`) field was missing as write-back field: this has been fixed.
- The *Thesaurus listing* and *Generic thesauruslist* (with tree structure) output formats, previously available for Adlib, have now been made available for Collections.

Item requests

- Some fields had an irrelevant Inheritable setting: this has been fixed.
- The task *Return items and close requests* did not work when the Catalogue number (IN) contained a space character: this has been fixed.
- The Issue slips reports have been generalised.

Library purchase orders

- The Total amount (`it`) field is now emptied before it is recalculated. Previously, the amount was increased every time the record was changed.
- The Default delivery period (`Of`) is now taken from a text file, instead of being hard-coded to '3'. The same text file value is used during the storage of Persons and institutions records.



- The Item document type (df) field was accidentally set to inheritable: this has been fixed.
- The (Meta)data URI submission (3z) field is linked to the Syncqueue database table, but there was no feedback reference in that database: this has been fixed.
- The *Persistent ID submission* task was missing and has now been added.

Loans (Incoming/Outgoing)

- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.
- The *List of loans* output format, previously available for Adlib, has now been made available for Collections.

Locations and containers

- The length of the Name (te) field has been limited to 100 (from 0). This is consistent with all other uses of Location name throughout the application.
- The Current location authorisation date (2g) field was not included in the Currentlocation field group. This has been fixed. **API/AIS implementations might be affected by the added group name!**
- The (merge) field Part linear space (cs) was never used, so it has been deleted.
- In the Gap report adapl RepositoryGapReport.ada two obsolete FACS aliases have been removed.

Maps

- The field Name had an incorrect data dictionary field name 'ed-it.name' and an incorrect definition as grouped field. The definition has been corrected to 'layer.name', Text (0), not repeatable, not grouped.

Media

- The field Original file name (ob) was editable, where it should be Read-only: this has been fixed.



- The field Coverage used the Thesaurus zoom screen, instead of the Geographical thesaurus zoom screen: this has been fixed.
- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.
- The linked Loan number (bn) field allowed forcing of Loans records, but there was no control into which Loans dataset the new record was added. Forcing has now been disabled. Forcing Loans records is only allowed from the Catalogue.
- The linked field Container type (t0) was not repeatable, although it is part of a repeated group. This has been fixed.
- The Field collection and Geographical thesaurus (return) links were not displayed on screen: this has been fixed.
- The *Photo listing with/without objects* output formats, previously available for Adlib, have now been made available for Collections.

Missions

- The linked object.current_location (2A) field had an invalid Data type Enumeration: this has been fixed.
- The field length of Location-linked fields has been adjusted to the corresponding field length in the Location database.

Missionitems

- The field length of Location-linked fields has been adjusted to the corresponding field length in the Location database.

Persons and institutions

- The after-field procedure for the E-mail (C8) field was looking for an already deprecated field (R1): this has been fixed.

Serial subscriptions

- Some field labels were only partly visible: this has been fixed.
- The non-operational, incorrect and outdated suppress conditions for the Issue list fields (Z1-Z9) have been removed.



- The *Purge old issues* task removed the wrong 'received' group occurrences and the purge log was not always printed in the proper language: this has been fixed.
- The *Purge old issues* task screen was changed to provide an explanation of the requirements for received issues to be removed successfully.

Manual purge of serial issues

- Manually purged issues (in the *Manual purge of serial issues* data source) are now written to the holding if the *Purge policy* for the relevant serial subscription is set that way.
- For manually purged issues currently no purge log Word document is being generated, due to Collections bug CV1-5815. Once fixed, *substor.ada/bin* must be replaced by *substorORI.ada/bin* (and "ORI" must be removed from the file names).

Series

- The *Listing with all fields* output format, previously available for Adlib, has now been made available for Collections.

Taxonomy

- In the Media link, the Original file name (ob) field was missing as write-back field: this has been fixed.
- The *Complete taxonomic record* output format, previously available for Adlib, has now been made available for Collections.

Thesaurus

- The zoom screen only showed the first Term code (tc): this has been fixed.
- The Period date fields (ps, pe) were not hidden for records that did not have the domain "period". This has been fixed.
- In the Related records view the domain of linking Geographical thesaurus records was not displayed correctly. This has been fixed.



- The Thesaurus listing and Generic thesauruslist (with tree structure) output formats, previously available for Adlib, have now been made available for Collections.

Transport

- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.

Use of collections

- The Standard search fields Start date and End date have been replaced by a new date range Search field *Use date (start-end)* that searches the date.start (r1) and date.end (r2) fields. Advanced search now also accepts > and < as search operators.
- For linked Catalogue records, the merged-in Dataset value was not displayed correctly: this has been fixed.

Cleanups

General

- The XSLT folders LIDO and LOD (containing test stylesheets) have been removed.
- The text file print.txt has become obsolete and has been removed.
- Remaining group numbers used in screen field definitions have been removed.
- Remaining Link search screen definitions in Change location tasks have been removed.
- The access rights for outdated Application ID's (archive+library, library, library+museum, museumbasis) have been removed. Background: The Library catalogue is now always included in all model application variants, and not sold separately anymore, or as an add-on.
- Obsolete access rights for the roles \$REST and \$ADMIN have been removed.
- Any irrelevant (hidden) Record type access rights on fields in databases where no Record type is used have been removed.



- For all databases the non-repeatable fields have been checked to be non-repeatable in the database definitions (.inf's) as well.
- The mostly obsolete screen element Image has been removed from screen files and replaced by a regular field element where applicable.

Collect

- Some obsolete Record types have been removed: they were mentioned in field-level record type access rights (all with full access) and in the hierarchical link definition.
- Some obsolete field definitions have been removed: these fields had never been put to use. It concerns: adloan_loan_category (bo), adloan_message_status (bs), adloan_message_field (UC), film_type_2 (Dg), government_access_flag (g1), res_tag.age (LE), nfa_access_flag (n1), nfa_status (n3), original_function (OF), res_tag.phase (PH), recorder_authority (RA), original_negative (RB), original_print (RC), old.copyright_note (RN), res_tag.sex (SX), title_manifestation (T1), title_manifestation.article (T3), title.type.rank (oy), video.implementation (vI), video.profile (vp), manifestation_level_type_specific (W9), internal_link_title (zg), internal_link_preref (zh)

Exhibitions

- The obsolete Hours and Costs fields (eh, ec, dc, l3, ah, ac, bc, l2) have been removed.

Loans

- The obsolete Hours and Costs fields (eh, ec, dc, ld, ah, ac, bc, le) have been removed.

Media

- The obsolete Document dataset selection field (FE) has been removed.
- The obsolete Ingest (In) field has been removed.



Missionitems

- Obsolete fields (mc, mt, Ol, pL, pA, nf) have been removed.



3 Selected topics

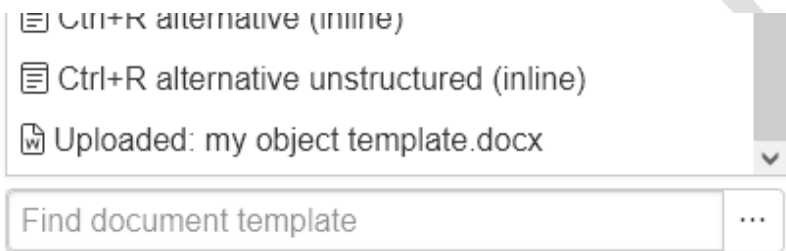
3.1 Managing uploaded output templates

For printing, Axiell Collections allows you to upload your own Word or Excel templates through the *Output formats* dialog.



Find document template ...

From model application 5.2, these uploaded templates are automatically stored on the server. The stored templates will then become available (initially under their file name, prefixed by the string "Uploaded: ") in the *Output formats* dialog too, so next time this template is needed for printing, the user can pick it straight from the *Output formats* dialog and won't need to upload it again.



☰ Ctrl+R alternative (inline)
☰ Ctrl+R alternative unstructured (inline)
📄 Uploaded: my object template.docx

Find document template ...

All Marked Current

You will only get to see your own uploaded templates and the templates you've been granted access to by others. Users with the \$ADMIN role will have access to all templates and records.

An extra data source called *Uploaded templates* has been added to the application. For every template you upload, a new record will automatically be created in this data source, referencing the uploaded template and providing some other details.



Record details

Action
Clipboard
Occurrence
Features

Uploaded template details
▲

Stored template ID [32238fab-5153-489c-9148-87c00a493cc0.docx](#)

Original file name [my object template.docx](#)

Visible template name [Uploaded: my object template.docx](#)

Data source ID [e687bc94-6708-465d-b121-f05e9b9591a7](#)

User role [erik](#)

Access rights [Full](#)

User role [\\$ADMIN](#)

Access rights [Full](#)

Category

Again, you'll only see records to which you have sufficient access rights. By editing their records you can change the name with which this template is visible to you in the *Output formats* dialog, add access rights for other users so that they'll see the template too, or delete the entire record if you don't want to see this template in the *Output formats* dialog anymore: on deletion you'll also get the choice whether you want the associated template file itself to be deleted too. You will never create new records in here manually, only edit them or delete them.

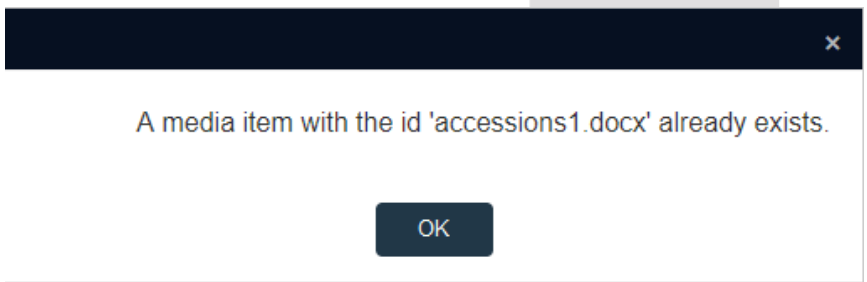
So a record contains only seven fields, of which you can edit just three. The seven fields are:

- **Stored template ID** – the uploaded template will be saved in the designated storage path under a unique ID or under its original file name*.
- **Original file name** – the original file name of the uploaded template will be saved in this field.
- **Visible template name** – initially, the original file name will be stored in this field too but you can change it to anything you like. This will be the visible title of the template in the *Output formats* dialog. It can only be entered in a single language.

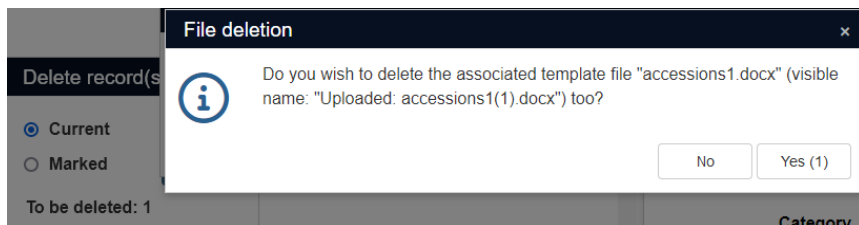


- **Data source ID** – the template can only be visible in the data source from which it was uploaded. The name of that data source will be converted to a unique ID and saved in this field.
- **User role/Access rights** – the user or role who uploaded the template will automatically get *Full* access rights. This means two things: this user or role will have *Full* access rights to this record (so don't delete this occurrence or change it to *Write*, *Read* or *None*) and the template will be visible to this user in the *Output formats* dialog of the relevant data source.
You can add extra occurrences to this field group to specify access rights for other users/roles: *Read*, *Write* or *Full* access rights will show the template in the *Output formats* dialog, while *Read* access rights won't allow other users to edit this record.
- **Category** – this field is for possible future use, currently it has no function.

* Whether the uploaded template file will keep its original file name or get a new GUID as its name, depends on the `UseOriginalMediaFileName` setting in the Collections *settings.xml* file. Now don't go changing this setting because it is far more relevant to other uses in the application, but you can look it up to see what it is set to currently. If it is set to `false`, it means that your uploaded template will get a GUID file name, while if it's set to `true` then the uploaded file will keep its original name. If the setting is `false`, you can upload new versions of your template (when you're still developing and testing it, for example) with the same name, because Collections will change their name to a GUID anyway. You can clean up your redundant *Uploaded templates* records and template files when you're done. However, if the setting is `true`, uploaded files will keep their name and because Collections won't overwrite existing template files when you upload them again you'll get a warning on upload that the media file already exists.



In this case you can do two things to remedy this: just rename the file you're trying to upload or look up the earlier created *Uploaded templates* record and delete it and the associated template file too.



You have about 10 seconds to click *No* if you don't want to delete the associated file too, otherwise the file will be deleted by default.

Important note about the deletion of the templates files

Template files can only be deleted during record deletion if in line 1 in the *reports.txt* file in the *\texts* sub folder of your Axiell system, a full path to the Axiell *\worddoc\uploadedtemplates* sub folder has been set up, otherwise Collections won't know from which folder the files must be deleted (of which the user will be notified when attempting to delete a file anyway). See the comments section in the *reports.txt* file for more information about this setting.



3.2 Improved PID management

Because of some ambiguity in the purpose of the "work PID" in model application versions 5.0 and 5.1, the available PID types per data source have changed in model application 5.2 and up: work PIDs are no longer present in 5.2. Now, on the *PIDs and other identifiers* screen tab, all data sources have a non-repeatable URI/URL for the metadata in this record field group for the PID which identifies the current record containing metadata about an object or descriptor. PIDs from a previous system that are still current should be entered here too.

All data sources also have a **repeatable** *Other identifiers* field group for all other PIDs and non-URI IDs:

- Any URIs here are always third-party URIs so there's no matching URL field because you won't have an internal URL to that resource. In all data sources, this other URI field can be used to identify a similar metadata record for the same object or descriptor in the database of another organisation, the information source where the content in this record was (partially) derived from, for example.
- The Non-URI ID can be used for all IDs (your own or third-party) which are not URIs, but identify (or used to identify) this record too. This can be a record ID from a now deprecated system, an old record number or object number for example.

For both URIs and Non-URI IDs you can also indicate the *Source* of the URI or ID, like the AAT or WikiData for example. This is a linked field to the *Thesaurus*, with the domain *PID source*.

To clarify the URI or ID you can enter a short comment in the *Qualifier* field. The *Publishable* checkbox is for your own information only, to indicate if an ID or URI is (potentially) publishable: it actually does nothing.



-GUID-

-URI/URL for the metadata in this record-

Last submission Action	Status	Status date Time	Notes
------------------------	--------	------------------	-------

<input type="text"/>	
Persistent URI	<input type="text"/>
URL	<input type="text"/>
Notes	<input type="text"/>

-Other identifiers-

Source	<input type="text"/>
URI	<input type="text"/>
Non-URI ID	<input type="text"/>
Publishable <input type="checkbox"/>	Qualifier <input type="text"/>
Notes	<input type="text"/>

Because the PID screen in all data sources (including the *Thesaurus*, the *Geographical thesaurus* and *Persons and institutions*) now contains the *Source* and *Non-URI ID* fields, the old *Source*, *Number/URI*, *Date* and *Time* fields which were present in records in these three data sources before have been removed from there in application version 5.2 because of redundancy.

Only in the *Multimedia documentation* data source there is yet another PID field group, the *URI/URL for the digital media* field group, to register a PID for the digital media file itself, if you want. So you can have a PID for this record (the resource for the metadata of the media file) and a separate PID for the digital resource that is the media file.



PIDs and other identifiers ▲

-GUID-

-URI/URL for the digital media-

Last submission	Action	Status	Status date	Time	Notes
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Persistent URI <input style="width: 90%; border: none;" type="text"/> </div> <div style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"> URL <input style="width: 90%; border: none;" type="text"/> </div> <div style="border-bottom: 1px solid #ccc;"> Notes <input style="width: 90%; border: none;" type="text"/> </div> </div>					

-URI/URL for the metadata in this record-

Last submission	Action	Status	Status date	Time	Notes
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Persistent URI <input style="width: 90%; border: none;" type="text"/> </div> <div style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"> URL <input style="width: 90%; border: none;" type="text"/> </div> <div style="border-bottom: 1px solid #ccc;"> Notes <input style="width: 90%; border: none;" type="text"/> </div> </div>					

-Other identifiers-

Source	<input style="width: 90%; border: none;" type="text"/>	⋮
URI	<input style="width: 90%; border: none;" type="text"/>	
Non-URI ID	<input style="width: 90%; border: none;" type="text"/>	
Publishable	<input type="checkbox"/>	Qualifier <input style="width: 90%; border: none;" type="text"/>
Notes	<input style="width: 90%; border: none;" type="text"/>	

Only for each newly created record, a URI and URL are automatically generated by Axiell Collections when the PID fields have been configured properly (which may not be the case for all types of PID fields, dependent on your application customization): in existing records you could add a URI and URL manually or via the *Assign PIDs* task.

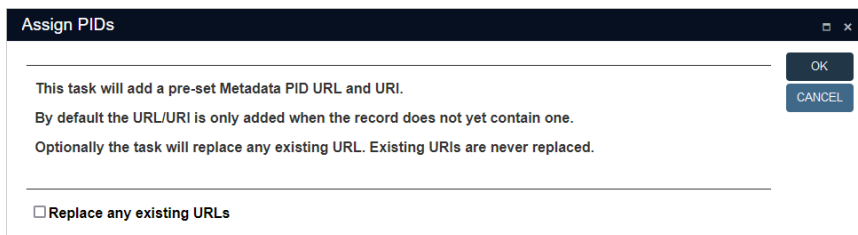
To add URIs and URLs to existing records in bulk for marked records (without ever having to configure the relevant fields in Designer), an *Assign PIDs* task is available in all data sources with PIDs. Prior to using this task, appropriate URL and URI formats need to be set in the *TaskAssignPIDs.txt* file in the *\texts* sub folder of your Axiell system. Please read the comments in that text file for more information about the formats you need to enter if you'd like to use the *Assign PIDs* task.

The task fills empty URI and empty or filled URL fields with the configured values. If the *Replace any existing URLs* checkbox on the task screen is marked, existing URLs will be replaced too. This is handy when placeholder URLs were used at first. (Existing URIs won't be re-



placed as URIs are permanent and should never need to be changed after you've submitted them to the handler. (Before submission to the handler you could still change them with a search-and-replace action though.)

In most data sources the task screen will look like this:



Assign PIDs

This task will add a pre-set Metadata PID URL and URI.

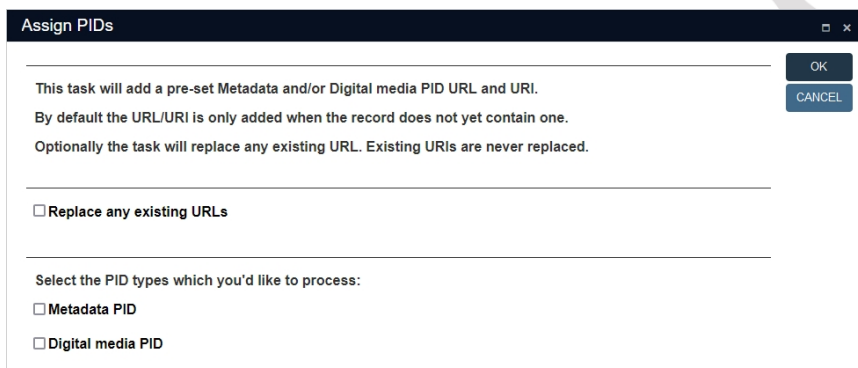
By default the URL/URI is only added when the record does not yet contain one.

Optionally the task will replace any existing URL. Existing URIs are never replaced.

Replace any existing URLs

OK
CANCEL

Only in *Multimedia documentation* the task screen will look as follows, offering the extra choice to select the PID types you'd like to process with this task (since media records have two types of PIDs). You can mark both PID type checkboxes or just one of them, but don't leave them both empty.



Assign PIDs

This task will add a pre-set Metadata and/or Digital media PID URL and URI.

By default the URL/URI is only added when the record does not yet contain one.

Optionally the task will replace any existing URL. Existing URIs are never replaced.

Replace any existing URLs

Select the PID types which you'd like to process:

Metadata PID

Digital media PID

OK
CANCEL

After running the *Assign PIDs* task for records which did not have a URI yet, you must run the *Persistent ID submission* task and use the *Create* option to create new submission records. After running the *Assign PIDs* task for records which already had a URI, you must run the *Persistent ID submission* task and use the *Update* option to have the handler associate the new URL with the existing URI. (URIs can't be "updated".)

It's up to you, as an application manager, to decide which PID types should be filled in automatically upon record creation (then the relevant PID fields should have been properly configured) and which should remain empty to be filled in optionally and manually by the user when appropriate.



The *PIDs and other identifiers* screen tab can of course be hidden or switched off for users who don't need to see these fields.

For the full topic on setting up this functionality, please see http://documentation.axiell.com/alm/en/index.html?ds_generaltopicslinkedopendata.html

Summary of technical changes

The new setup involved the following application changes:

- The Work PID fields and indexes have been removed (in all relevant databases, except Media).
- In the Media database the Work PID fields have been changed into media PID fields. The field names and group name have been changed.
- A combined index on Media PID and Metadata PID has been added.
- The Metadata PID field names have changed (in all relevant databases, except Media). An index on Metadata PID has been added.
- In the Other PID's field group new fields have been added to register the Source name, the source's ID (when not an URI), and to label the source reference as publishable. A Date and Time field have been added, but these fields are not automatically filled.
- In the data sources Persons and institutions and (Geographical) Thesaurus, the Source reference fields Source (br), Source Number (tn), Source Reference Date (Ad) and Source Reference Time (At) have been removed.
- The databases' field and storage ADAPL procedures have been adjusted to the removal of the Work PID fields. A new check has been added that prevents the Metadata PID from also being recorded in the Other PID group.
- The Persistent ID submission task has been adjusted to only process Metadata PID's, except in the Media data source, where also the Media PID is processed.
- Help texts have been added for all new and changed PID fields.

Note that API/AIS implementations might be affected, since field and group names have changed.

