The State University of New York

Configuring Description Templates for Enumeration & Chronology

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Configuring Description Templates for Enumeration & Chronology

In this session we will cover:

1. Required Roles to configure Description Templates
2. Benefits of configuring Description Templates
3. Enumeration (enum) and chronology (chron) basics
4. Configuring Description Templates
5. Configuring Description Templates to display the month as text

REQUIRED ROLES TO CONFIGURE DESCRIPTION TEMPLATES

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Required Roles to Configure Description Templates

Requires one of the following roles to configure description templates:

- Repository Administrator
- Catalog Administrator
- General Administrator

BENEFITS OF CONFIGURING DESCRIPTION TEMPLATES

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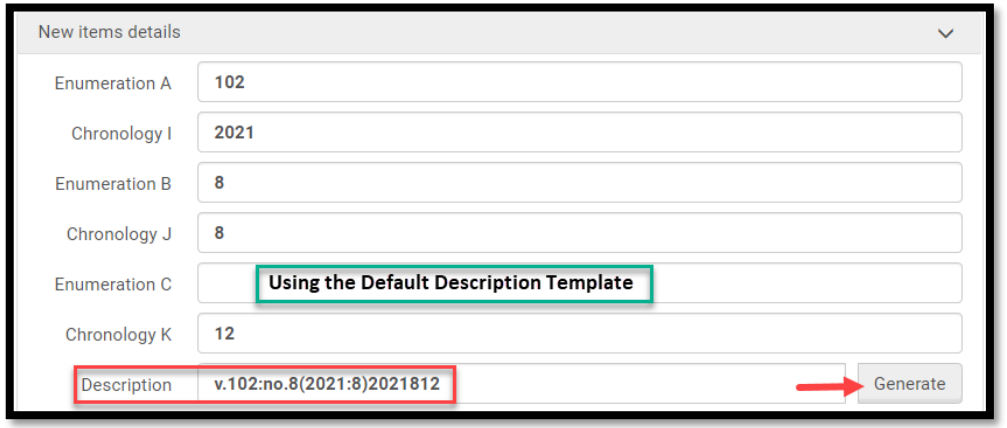
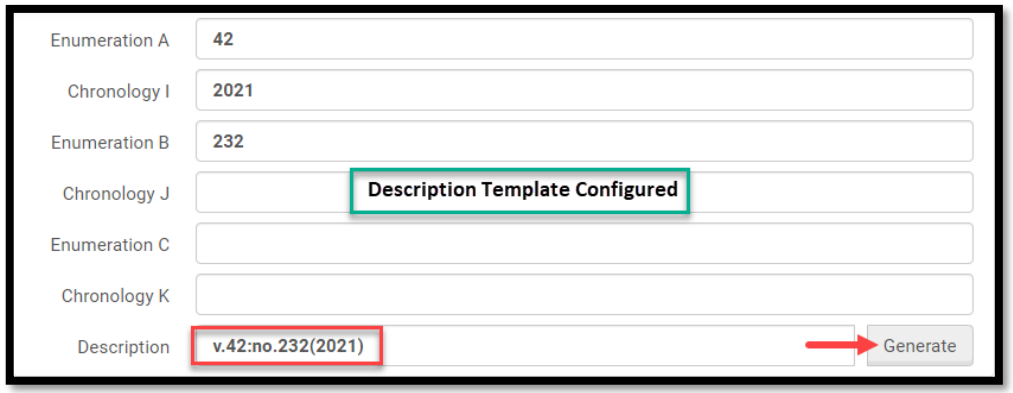
Benefits of Configuring Description Templates

Benefits to configuring Description Templates:

- The default Description Template will not be applied to all continuous/serial items when clicking the **Generate** button when receiving or in the Physical Item Editor
  - The default Description Template will only be applied if configured Description Templates do not meet the criteria
- Standardizes descriptions in Alma
  - Clicking the **Generate** button will properly display the enum and chron based on the configured description template from receiving or the Physical Item Editor
- No longer need to type the description manually in the description field
- Can configure months to display as text, instead of the numeric value





ENUMERATION AND CHRONOLOGY BASICS

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Enumeration (Enum) & Chronology (Chron) Basics

- Enum & chron define the publication pattern for continuous/serials titles
- Description Templates do not require MARC21 Holdings 853-855 and 863-865 to be configured
  - Prediction patterns requires MARC21 holdings 853-855
- Publication patterns can be found in the:
  - MARC 310 (Current publication frequency) in the MARC21 Bibliographic record
  - MARC 853-855 in the MARC21 Holdings record
- Date of publication and/or sequential designation can be found in MARC 362 in the MARC21 Bibliographic record
- Display of serial/continuous holdings in Primo VE can come from:
  - MARC21 Holdings 853-855 and 863-865 combined
  - MARC21 Holdings 866 (Textual holdings statement field)

Enumeration (Enum) & Chronology (Chron) Basics

- Continuous/serial Holdings are made up of:
  - Captions and patterns:
    - Contained in MARC21 Holdings 853-855
    - Captions contain word(s)/phrase(s) to divisions based on the numbers in enumeration
      - Example; volume, vol., or v., number or no.
    - Patterns contains how the item is published
      - Example; frequency, time of publication, regularity
  - Enumeration and chronology:
    - Contained in MARC21 Holdings 863-865
    - 853-855 are linked to 863-865
    - Eunum and chron contain the enumeration and chronology for the continuous/serial title
      - Enumeration contains volumes, numbers, parts, sections, etc in numeric values
      - Chronology contains years, months, seasons and/or days
  - MARC21 Holdings 866 contains textual holdings that combine 853-855 and 863-865

853 2 0 ‡8 1 ‡a v. ‡b no. ‡u 6 ‡v r ‡i (year) ‡j (month) ‡w m ‡x 01,07

863 3 0 ‡8 1.1 ‡a 113-123 ‡i 1923-1928

853 2 0 ‡8 1 ‡a v. ‡b no. ‡u 9 ‡v r ‡i (year) ‡j (month) ‡w m ‡x 01 ‡y om06,07,08

863 3 2 ‡8 1.1 ‡a 1-4 ‡i 1941-1943

863 3 2 ‡8 1.2 ‡a 6-86 ‡i 1945-1987

866 3 1 ‡8 0 ‡a v.1(1941)-v.86(1987) ‡x bound in 2 v. per year ‡z Some issues missing

Enumeration (Enum) and Chronology (Chron) Basics

Enumeration and Chronology levels defined:

Enum	Definition
A (a)	First level of enumeration
B (b)	Second level of enumeration
C (c)	Third level of enumeration
D (d)	Fourth level of enumeration
E (e)	Fifth level of enumeration
F (f)	Sixth level of enumeration

Chron	Definition
I (i)	First level of chronology
J (j)	Second level of chronology
K (k)	Third level of chronology
L (l)	Fourth level of chronology
M (m)	Alternative numbering scheme, chronology
V (v)	Issuing date

Example 1: v.92:no.17(2021:August 17)

- v. = Enum A (first level)
- no. = Enum B (second level)
- Year = Chron I (first level)
- Month =Chron J (second level)
- Day = Chron K (third level

Example 2: no.17(2021)

- no. = Enum B (first level)
- Year = Chron I (first level)

Enumeration (Enum) & Chronology (Chron) Basics

- Descriptions use numeric values to represent months and seasons out of the box in Alma
  - Description templates can be configured to allow for the display of the alphabetic representation for month and/or season

Month	Alma Display
January	01
February	02
March	03
April	04
May	05
June	06
July	07
August	08
September	09
October	10
November	11
December	12

Season	Alma Display
Spring	21
Summer	22
Fall	23
Winter	24

CONFIGURING ENUMERATION AND CHRONOLOGY TEMPLATES

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Configuring Enumeration and Chronology Description Templates

- Before configuring description templates:
  - Compile a list of serials descriptions used at your institution
  - Make sure the punctuation and spacing are correct per ANSI/NISO standards or per your institution's policies
- Description templates are applied in the order that they are configured:
  - The first description template that meets the criteria will be applied when generating a description
  - Arrows can be used to change the position of the description template
  - The default template is applied if none of the configured rules meets the criteria for the description

v.

v.(year)

v.(year:month)

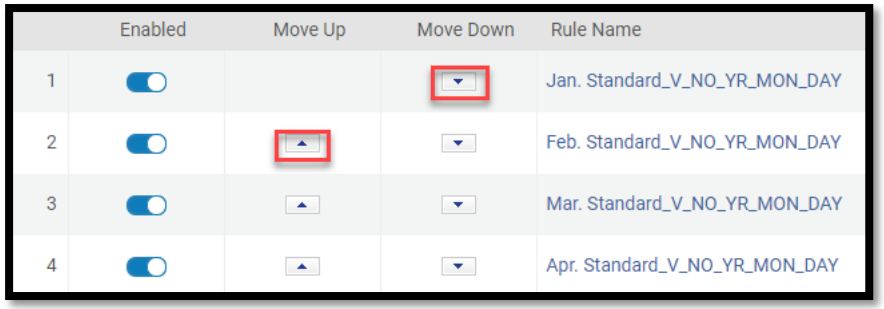
v.(year:month/month)

v.(year:season)

v.:no.(year:month)

v.:no.(year:month/month)

v.:no.(year:month:day)



Enumeration & Chronology Punctuation

Enum and chron punctuation based on ANSI NISO standards (Table 3.1):

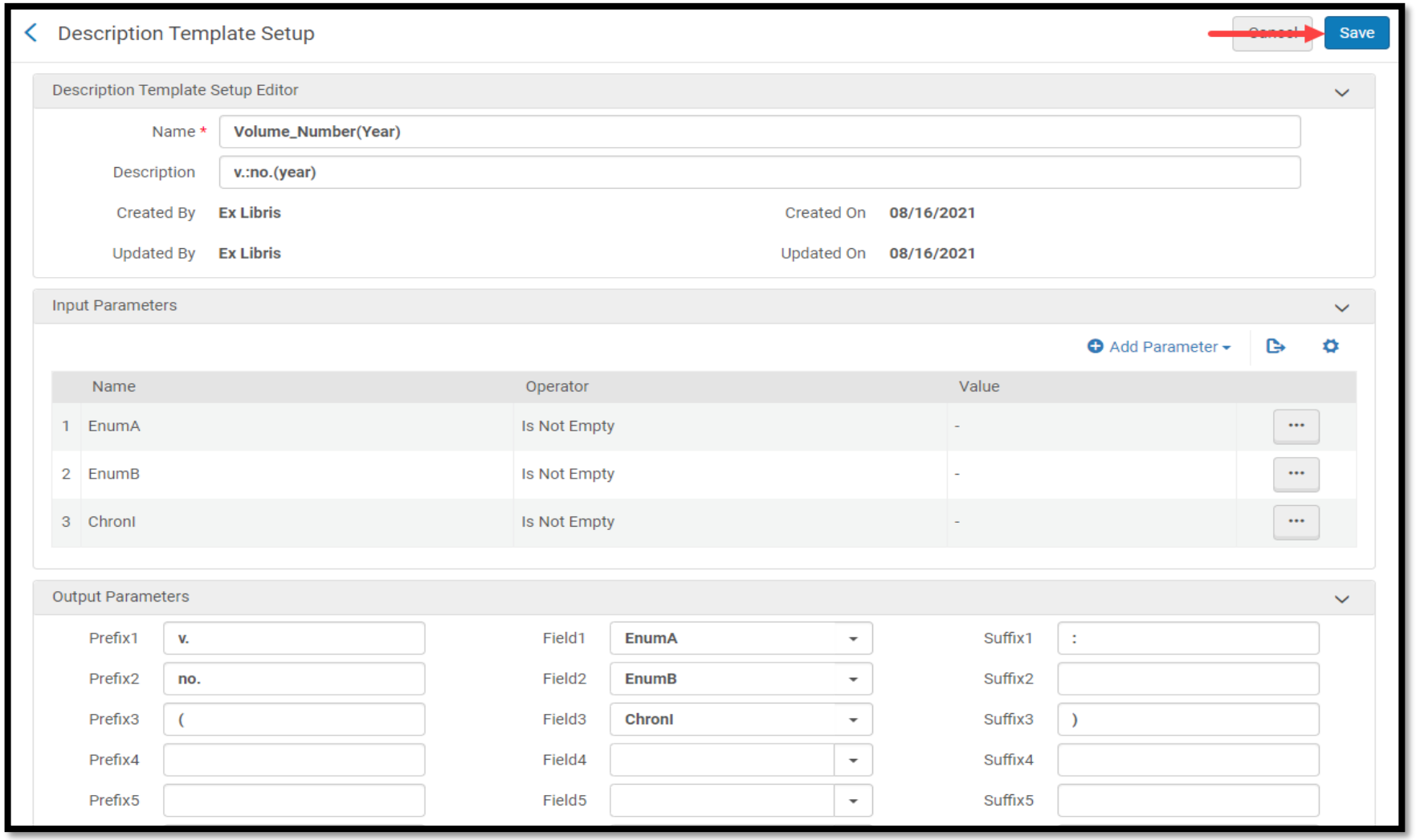
Name	Symbol	Purpose	Example
Blank		Indicates separation of data elements within an area.	v.1-9 10 <Tables> 11 <Index>
Colon	:	Separates two orders or levels of hierarchical bibliographical units. Blanks are not used before or after the colon.	v.1:pt.1 v.1:no.1:pt.1
Comma	,	Indicates a gap in a range of holdings. Blanks are not used before or after the comma.	v.1,v.3
Equal sign	=	Separates alternative numbering schemes. Blanks are not used before or after the equal sign.	v.2:no.5=fasc.15
Forward slash	/	Indicates combined numbering, combined chronology or non-calendar year chronology data. Blanks are not used before or after the diagonal.	v.1/2 1969/1970
Hyphen	-	Indicates an unbroken range of holdings or open holdings. Blanks are not used before or after the hyphen.	v.1-3 v.1-
Parenthesis	()	Separates enumeration and chronology when the data are recorded together. Parentheses are neither preceded nor followed by a blank.	v.1(1983)
Semicolon	;	Indicates a non-gap break. Blanks are not used before or after the semicolon	v.1-4;v.6
Square brackets	[]	Encloses supplied enumeration orchronology. The opening square bracket is always preceded by a blank; the closing square bracket is always followed by a blank.	[1981/1982]

Configuring Enumeration and Chronology Templates

To configure description templates:

1. Go to ***Configuration Menu>Resources>General>Description Templates***
2. Click ***Add Rule***
3. The Description Template Setup screen opens
   a) Name: [Name the template]
   b) Description: [Optional]
   c) Click ***Add Parameter***
      a) Name: [Select the enum or chron necessary)
      b) Operator: [Select “is not empty’]
      c) Click ***Add Parameter***
   d) Output Parameters: [Populate the parameters for the way the enum/chron should display]
      - Values are added in the prefixes and suffixes
      - Spaces can be added in the prefixes and suffixes to separate values
   e) Click ***Save***
   f) Repeat steps 2-3 for each description template being configured
   g) Use the arrows to change the order of the Description Templates as needed

Configuring Enumeration and Chronology Description Templates



CONFIGURING ENUMERATION AND CHRONOLOGY TEMPLATES TO DISPLAY MONTH AS TEXT

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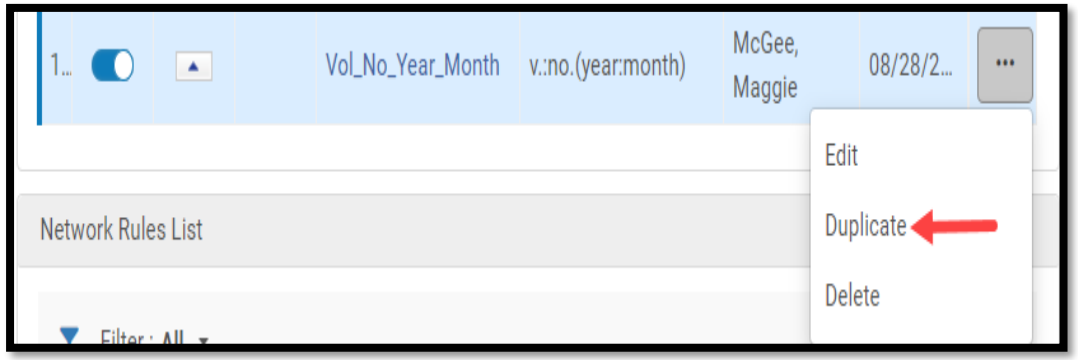
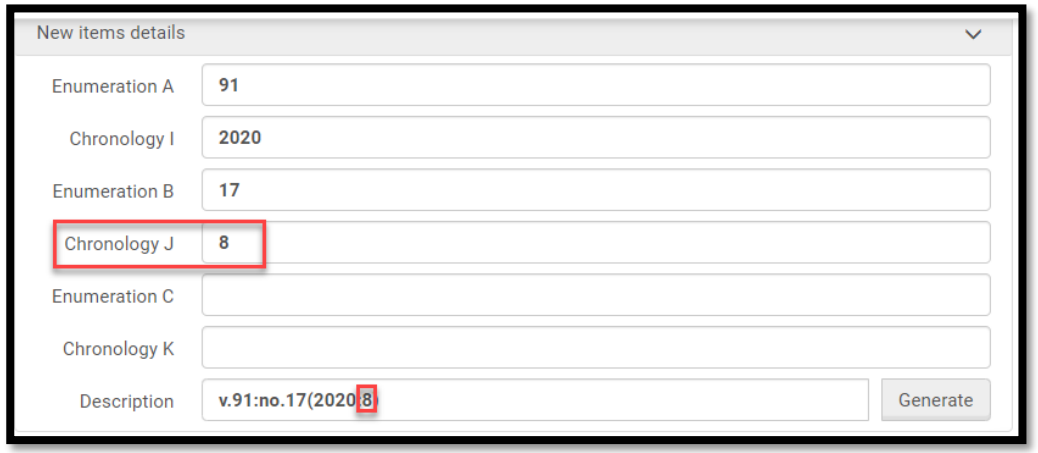
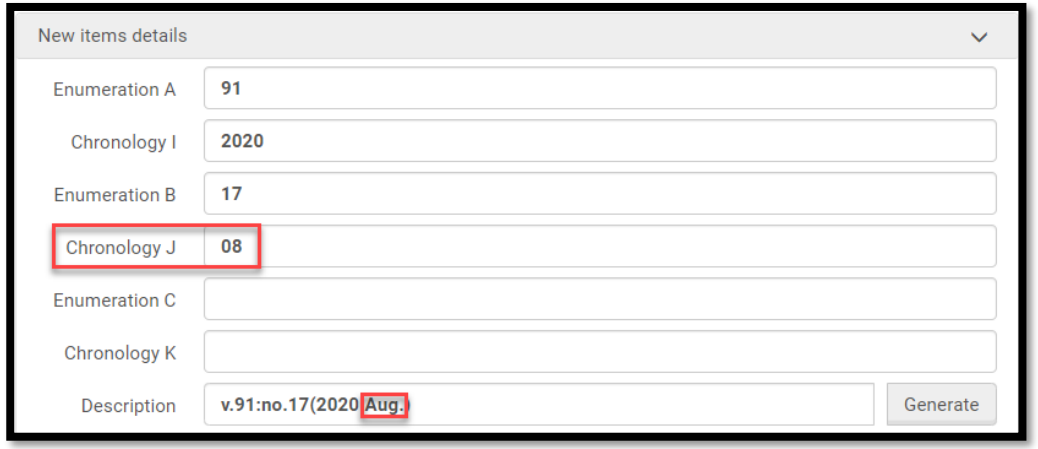
Configuring Enum and Chron to Display Month as Text

- A description template must be configured for each month per enumeration and chronology for the month to display instead of the numeric equivalent (12 per description template)
- The Description Template rules can be duplicated to speed up the process
  - Click ***Duplicate*** from the ellipses of the Description Template being replicated





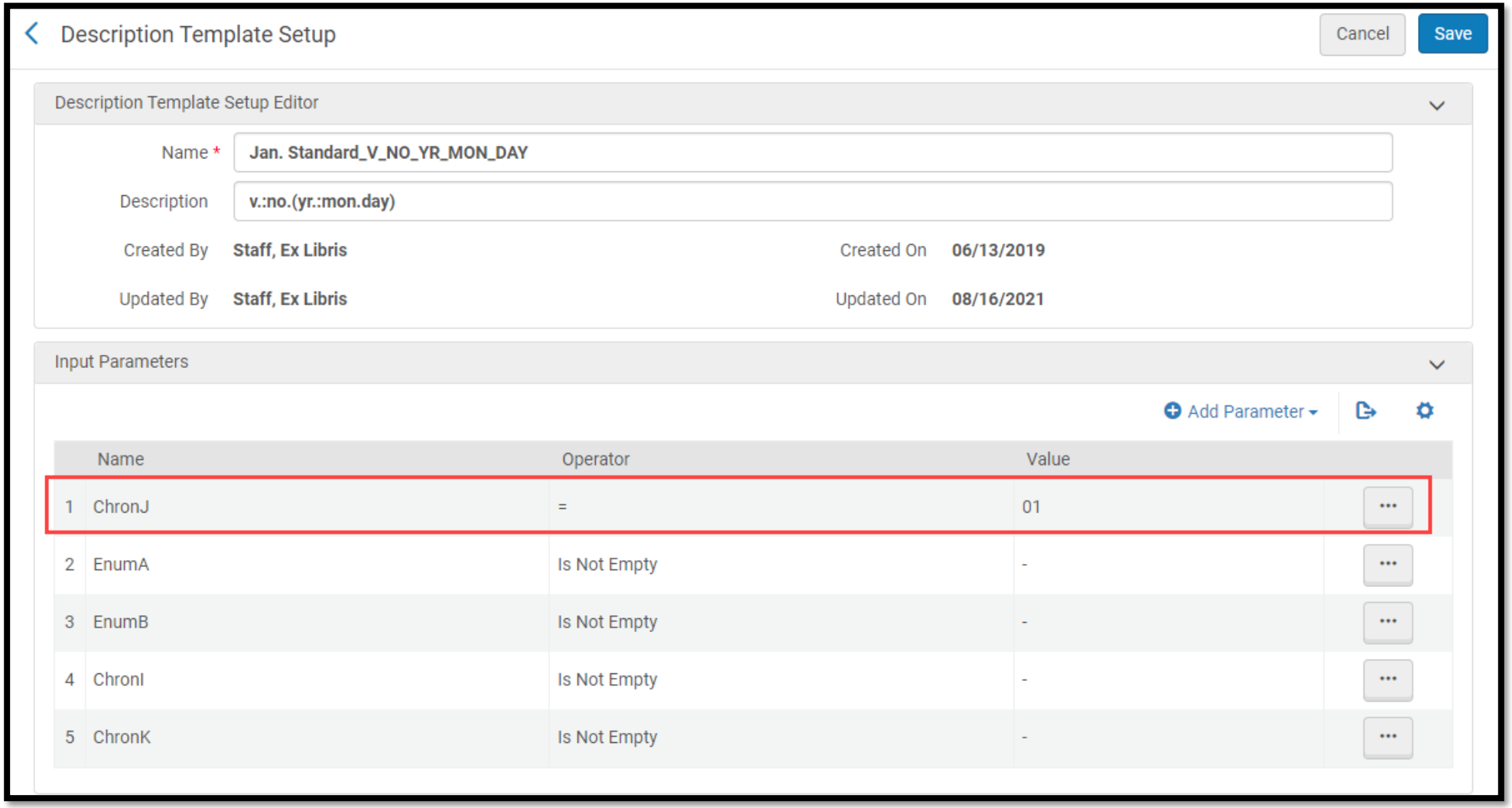


Configuring Enum and Chron to Display Month as Text

To create a description template for the name of the month to display:

1. Go to ***Configuration Menu>Resources>General>Description Templates***
2. Click ***Add Rule***
3. The Description Template Setup screen opens
    a) Name: [Name the template]
    b) Description: [Optional]
    c) Click ***Add Parameter***
        a) For all enum and chron except the value used for month display:
            a) Name: [Select the enum or chron]
            b) Operator: [Select “is not empty’]
            c) Click ***Add Parameter***
        b) For the value being used for month display:
            a) Name: [Select the enum or chron]
            b) Operator: [Select “equals’]
            c) Value: [Type numeric value of the month]
            d) Click ***Add Parameter***

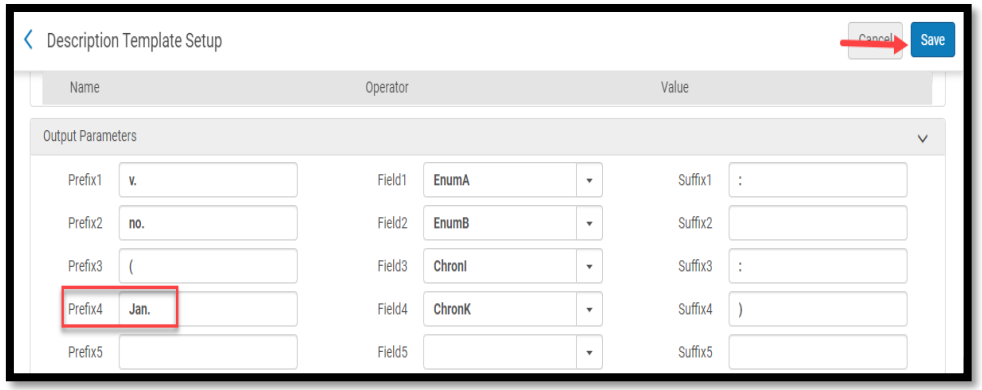
Configuring Enum and Chron to Display Month as Text

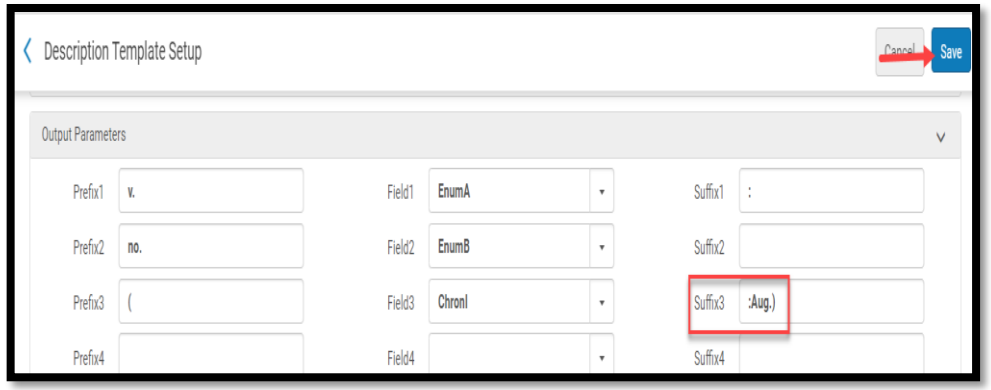


Configuring Enum and Chron to Display Month as Text

To create a description template for the name of the month to display continued:

3. The Description Template Setup screen opens continued:
   d) Output Parameters: [Populate the parameters for the way the enum/chron should display]
      - Values are added in the prefixes and suffixes
      - Spaces can be added in the prefixes and suffixes to separate values
      - Do not add the enum or chron field for the month configured in the Input parameters
      - Type the month in the prefix prior to the enum or chron it will precede or the suffix for the enum or chron prior to it





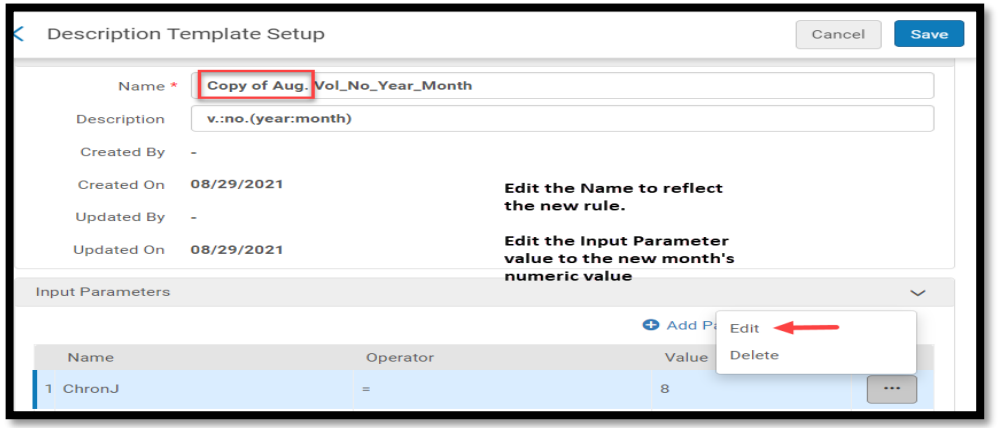
   e) Click ***Save***

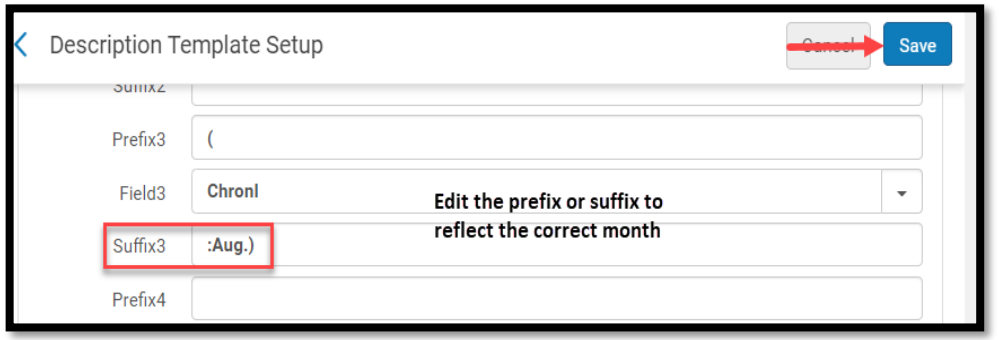
Configuring Enum and Chron to Display Month as Text

To create a description template for the name of the month to display continued:

4. Click ***Duplicate*** from description template that was just created to display the month
5. Edit the Name
6. Edit the enum or chron Input Parameter value for the month
7. Edit the prefix or suffix with the new month abbreviation
8. Click ***Save***
9. Repeat steps 4-8 until the description template has been configured for each month
10. Use the arrows to change the order of the Description Templates as needed

NOTE: Same workflow can be applied to configuring Description Templates for seasons





SUPPORTING DOCUMENTATION

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Technical Migration

SLS:

- Prediction Patterns
- FAQ: How do I configure description templates in Alma for enumeration and chronology?

Ex Libris:

- Configuring Item Description Templates
- How to Display Enumeration Level b Value as Text in the Item Description

Other:

- ANSI/NISO: Holdings Statements for Bibliographic Item
- What is a MARC Holdings Record and Why is it Important?