

Collection-level descriptions in the Scottish Collections Network (SCONE)

A guide and manual for maintaining the database

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Introduction

Creating a collection-level description (CLD) in SCONE can be simple and straightforward, because the minimal requirement is for a collection title only.

But if the CLD is to be effectively used in a resource discovery service, it should contain sufficient information for it to be retrieved by appropriate search criteria and identified as relevant by the enquirer.

Additional complexity results from SCONE requirements to minimise duplication and improve precision and recall within the SCONE service, and improve interoperability with similar services elsewhere.

This guide to the SCONE approach to collection-level description attempts to clarify the procedures for creating and maintaining CLDs in the database, and should be used in conjunction with the help associated with various web pages used in the updating process.

What is a collection?

SCONE is based on *An Analytical model of collections and their catalogues* (<http://www.ukoln.ac.uk/metadata/rsip/model/>), a study carried out by **Michael Heaney** on behalf of the UK Office for Library and Information Networking with support from OCLC.

Heaney says:

"The preliminary work done by UKOLN with respect to collection description identified 'collection' as encompassing the following types of entity:
Internet catalogues (e.g. Yahoo)
Subject gateways (e.g. SOSIG, OMNI, ADAM, EEVL, etc.)
Library, museum and archival catalogues
Web indexes (e.g. Alta Vista)
Collections of text, images, sounds, datasets, software, other material or combinations of these (this includes databases, CD-ROMs and collections of Web resources)
Collections of events (e.g. the Follett Lecture Series)
Library and museum collections
Archives
Other collections of physical items
Digital archives.

...

The model says nothing explicit about the size of a Collection. It is possible to envisage a 'Collection' consisting of one Item. Where an institution can choose between different degrees of aggregation in determining what are its Collections, there is no structure inherent in the model which requires or predisposes a particular level of aggregation. The institution should base its choices on its own pragmatic grounds, such as the level of detail required to make explicit those elements of the Collection-Description which the institution deems to be useful or necessary for the purposes of resources discovery or collection management (i.e. should adopt a 'functional granularity' approach)."

What about my collection?

The SCONE structure allows this flexibility, and any type of collection at any level of detail can be recorded. As a guideline, however, SCONE would not normally include collections which are only of interest to one person, or collections with volatile or dynamic contents, such as the bookmarks 'collected' during a Web search; in this example, it is likely that the same search carried out a week or so later would result in a significantly different set of items, in the form of bookmarks, belonging to the 'collection'.

To determine whether a collection should be recorded in SCONE, it helps to consider how the collection is defined, and by whom, and for which categories of user.

If intellectual or administrative effort has gone into the definition of the collection, then it is probably worth recording.

The components of a Collection-Level Description

In SCONE, a **Collection-Level Description** is composed of information taken from several types of record which are related to each other in specific ways. Each type of record stores a different set of data.

Record types

Collection record

The Collection record stores information about the collection itself, including its **title**, **description**, **size** and **type**.

Location record

The Location record stores information about the location of the collection. There are two distinct types of Location record, for **physical** and **electronic** locations.

A physical location record includes the location's **name**, postal **address**, and **notes** about physical access such how to travel to the location, allowance for special needs, etc.

An electronic location record includes the location's **name** (or label, etc.), **URL** (or electronic address), and **notes** about electronic access such as logging on, authentication, etc.

Agent record

The Agent record stores information about persons and organizations associated with a collection or location. There are two distinct types of Agent record, for **person** and **organization** agents.

A personal agent record includes the person's **name**, **dates** of birth and death, **role**, **biography**, **telephone** number, **email** address, etc., as appropriate.

An organizational agent record includes the organization's **name**, **role**, **history**, **telephone** and **fax** numbers, **email** address, etc.

Relationships between different record types

Collection and Location

The only relationship between a Collection record and a Location record is: **is located in** (is the location of, reciprocally).

Collection and Agent

There are several possible relationships between a Collection record and an Agent record:
is collected by (collects);
is owned by (owns) - this relationship includes information about restrictions imposed by the Agent, such as **copyright**;
contains items about (is the subject of);
contains items created by (creates) - for example, a collection of works by a famous author;
contains items produced by (produces) - for example, a collection of works published by a particular press.

Location and Agent

The only relationship between a Location record and an Agent record is:
is administered by (administers) - this relationship includes information about restrictions imposed by the Agent, such as **opening hours**.

Relationships between similar record types

Collections

There are several possible relationships between two Collection records:
is a parent/super collection of (is a child/sub collection of) - there is no restriction on the number of parent or child collections that any one collection might have (but only one of its parents may be 'physical' and all others must be of the type 'dispersed' or 'distributed');
is catalogued/described by (is the catalogue/description of) - catalogues are collections of metadata, and have their own collection-level descriptions in SCONE;
is related in some other way to - for example as a result of a split or breakup of an older collection.

Locations

The only relationship between two Location records is:
is a parent/super location of (is a child/sub location of) - for example, a special room within a library.

Agents

The only relationship between two Agent records is:
is a parent/super agent of (is a child/sub agent of)- for example, persons who are members of a team, or divisions of an organization.

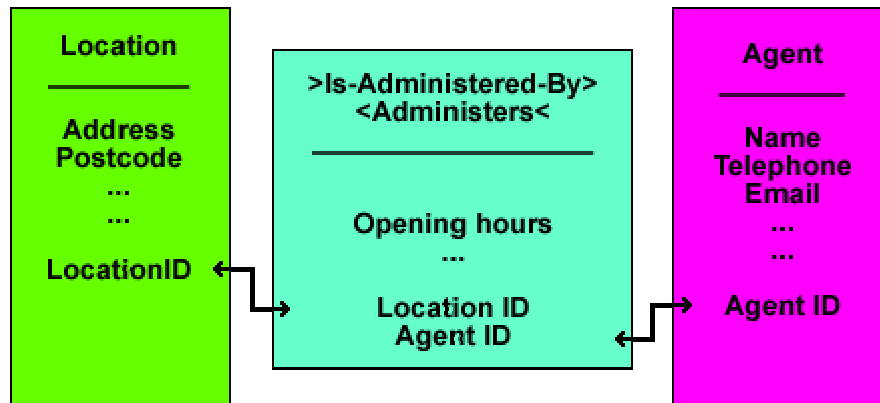
A useful Collection-Level Description need not contain every type of record and relationship, or every piece of data within a record. Some data may not be relevant or appropriate, such as the telephone number of an Agent from the 18th century, while some data may not be available. Some enquirers may find it useful to know that a named collection exists, even if there is no information about where it can be found, or who manages it.

The minimum requirement for a Collection-Level Description in SCONE, therefore, is a Collection record; the minimum requirement for a Collection record is a title and type.

How data is stored and assembled for display

The SCONE relational database stores information about collections as fields in records defined by tables. The tables and record structure correspond to the Entity-Relationship analysis in *An Analytical model of collections and their catalogues*. In particular, the tables correspond to types and sub-types, and the record fields to attributes, of Entities and Relationships.

Each record is identified by a unique ID number. The information from two or more records is brought together using these IDs.



Entity-relationship model implemented in the Scone database

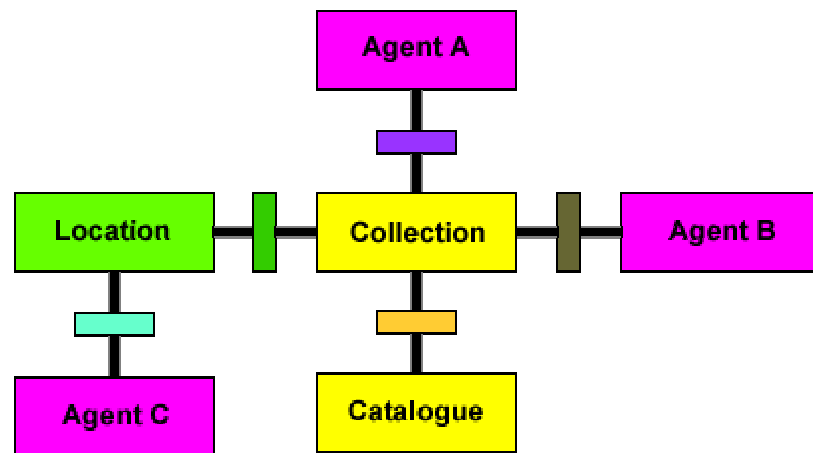
In the example shown in the diagram, the Entity-Relationship of Location:Is-Administered-By:Agent is implemented in three different records, for the Location and Agent entities, and the Is-Administered-By relationship. Appropriate fields in each record store information about a Location's address, opening hours, and telephone number, etc.

The IDs linking the records ensure that the information is collated for display and other output.

A Collection-Level Description is centred around a specific Collection entity, implemented as a Collection record with fields for collection name, narrative description, etc.

While this in itself is sufficient to create a corresponding Collection-Level Description, a typical CLD will contain information about the collector, owner or other type of agent, the location and its administrator, and the associated catalogue.

This information is stored in the SCONE database as a set of entity-relationship records for integrated output.



Typical collection-level description

A typical collection-level description contains information about the collection, its location, its catalogue, and a number of agents. The diagram shows five entity-relationships:

- Agent A:Collects:Collection
- Agent B:Produces-Items-In:Collection
- Location:Is-Location-Of:Collection
- Location:Is-Administered-By:Agent C
- Collection:Is-Described-By:Catalogue

The diagram indicates that the three Agent entities are different: in the example of the Macdonald Publishers Collection, Agent A could be the collector, Callum Macdonald, and Agent B the producer of the items in the collection, Macdonald Publishers. Agent C is the staff team administering the National Library of Scotland's main library.

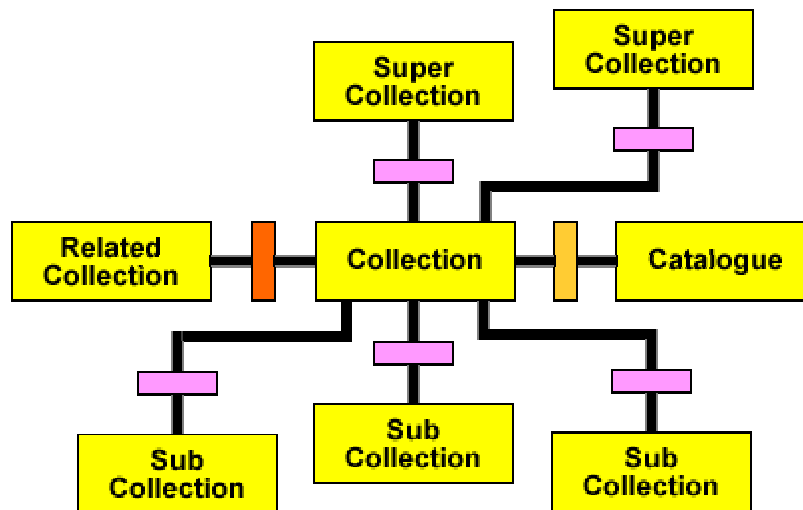
In many cases, however, the same Agent can be associated with a collection in several different ways. A collection of works by and about a writer associates the writer as both creator and subject, and a third role as administrator controlling access to a private library is not uncommon.

In SCONE, there is only one record for any instance of an entity; there is only one record for the writer, and different relationships link to the same ID. In the diagram, Agents A, B and C would become a single box, with the data relations 'stretched' to connect.

Relating collections to other collections

In a single Collection-Level Description, a specific relationship, Is-Described-By, may link the Collection record to another record in the collection table. This will happen when the Collection-Description entity is a catalogue, in other words a collection of metadata, and therefore requiring its own Collection record.

Hierarchical relationships between collections, to allow sub and super collections to be associated, are implemented using the Has-Part relationship.



Relationships between Collections

SCONE requires some collections to have more than one super collection. For example, the collections identified by the Scottish Working Group on Official Publications are located amongst the member libraries. Each collection has a physical super collection in the form of holding library, but each collection is also part of the distributed super collection of official publications of interest to SWOP.

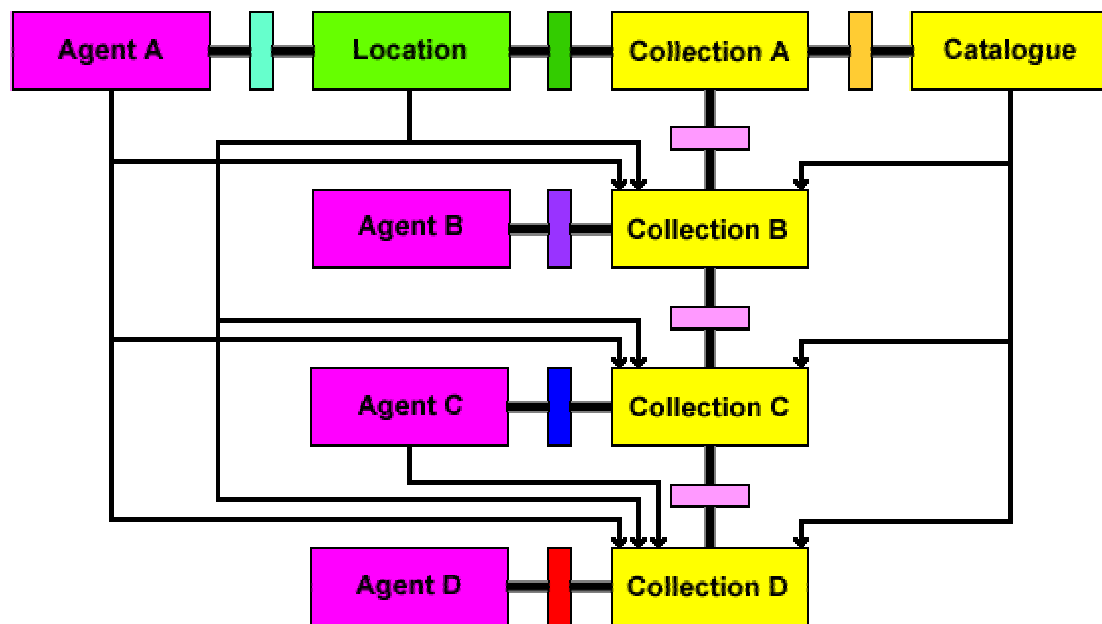
Other relationships between collections are also implemented.

Reusing data and avoiding unnecessary duplication

SCONE records Collection-Level Descriptions as 'flat' as possible, that is, the components of a SCONE CLD are all at the same level of granularity or specificity. SCONE then assumes that information at a particular level of granularity applies by default to all narrower or more specific levels.

When assembling a Collection-Level Description around a Collection record, SCONE checks whether it has a related Location. If there is none, SCONE identifies which of the immediate super-collections is of a physical type, and checks for a related Location. If it finds one, the data is 'cascaded' down. If it doesn't find a Location, the process is re-iterated through the levels of super-collection until one is found.

A similar process is used for Catalogue information. SCONE also cascades information about some, but not all, types of Agents. SCONE assumes that Location Administrators and Owner Agents have jurisdiction at all sub-levels of collection, while Collector and Subject Agents only apply to the level of collection they are directly related to. The SCONE implementation allows for flexibility in these choices.



Data inheritance = Information cascade

In this diagram, four levels of granularity of a collection are shown with relationships recorded at the nearest co-extensive level.

Collection A is the library collection of a university, located in a single building (Location A), and described by Catalogue A, covering the whole library. Location A is administered by Agent A. Collection B is a named special collection collected by Agent B and subsequently donated to the library. Collection C is a sub-collection of this special collection, consisting of works originally owned by Agent C. As well as printed books, these works include a set (Collection D) of letters written by Agent D.

This example results in four collection-level descriptions:

- Collection A is located in Location A (which is administered by Agent A) and catalogued in Catalogue A.
- Collection B is/was collected by Agent B and is located in Location A (which is administered by Agent A) and catalogued in Catalogue A.

- Collection C is/was owned by Agent C and is located in Location A (which is administered by Agent A) and catalogued in Catalogue A.
- Collection D of items created by Agent D is/was owned by Agent C and is located in Location A (which is administered by Agent A) and catalogued in Catalogue A.

Each piece of information is recorded only once, and the hierarchical relationship between Collections provides a link to more specific levels of granularity.

The flexibility and efficiency of the SCONE implementation is maximised by creating multiple layers of granularity in the Collection records. The granularity of Collection records need not solely be defined by existing names and labels; *An Analytical model of collections and their catalogues* allows for collection boundaries to be defined pragmatically. SCONE exploits this by creating Collection records defined by location and sub-location, and relationship with agents controlling access. This, in effect, ensures that Location and Agent relationships with Collections are co-extensive, and the resulting pragmatic Collection-Level Description is as flat as possible. It is easy to slot the extra levels of granularity into the hierarchy of collection records.

Creating a new CLD

A new Collection-Level Description (CLD) can be created with just the title of the collection. A minimal CLD requires just one Collection record, and the only mandatory field in a Collection record are the title and collection type.

Such a minimal description may still be of use, for example in identifying the existence of a collection with that title or indicating the subject if it is included in the title.

The more detail that can be added to the description, the more use it is likely to be to a wider range of enquirers. It is better to record the details to hand, and then make additions later, than to wait until a more complete description has been built. SCONE allows this flexibility, and it is possible to build up a very useful description in a number of stages.

SCONE encourages the re-use of information, and it is worthwhile checking to see if records already exist in SCONE for people, organizations or locations associated with the new collection. In particular, SCONE contains records for nearly all of the public, school, academic and special libraries in Scotland (via the SLIR database) and their administrative collections; if the new collection is a sub-collection of any of these, it can be related hierarchically and benefit from information being cascaded down from the existing CLD.

Preparation

Details of a CLD are stored in different areas of the SCONE database.

Each area is maintained separately, and the CLD is best created in an ordered set of stages.

The CLD should be analysed to determine those details that require recording separately as a Location, one or more Agents, a collection-description, and the relevant relationships.

SCONE should be checked for the availability of existing entries.

To record information about:

The name, URL, and notes about an electronic location, or the name, address, and notes about transportation relevant to a physical location.

The name, dates, role, short biography, telephone number, fax number, email address, and homepage URL relevant to a person, or the name, short history, telephone number, fax number, email address, and homepage URL relevant to an organization, in the role of collector, creator, producer, collection owner, collection subject, or location administrator.

The name, URL and notes about an online analytic finding-aid such as an OPAC, or information about a card catalogue or shelf-list.

The current accrual policy for adding items to the collection.

The details of access charges for using items in the collection.

Opening hours and other conditions of access associated with the location of the collection, including prior notification of a visit.

Requires:

A Location record

An Agent record.

A collection-description CLD.

A Collection:Is-Collected-By:Agent relationship; which requires a collector Agent record.

A Collection:Is-Owned-By:Agent relationship; which requires an owner Agent record.

A Location:Is-Administered-By:Agent relationship; which

requires an
administrator Agent
record.

Stages in creating a new CLD

- 1 Add Collection details.
- 2 Display the new CLD.
- 3 If super-collection exists: Add Collection:Has-Part:Collection relationship.
Redisplay the CLD.
- 4 If required: Add Location details.
Add Collection:Is-Located-In:Location relationship.
Redisplay the CLD.
- 5 If required: Add Agent details.
Add Location:Agent relationship.
Redisplay the CLD.
- 6 Repeat as required: Add Agent details.
Add Collection:Agent relationships.
Redisplay the CLD.
- 7 If required: Add collection-description CLD.
Add Collection:Is-Described-By:Collection relationship.
Redisplay the CLD.
- 8 End.

Adding a collection-description CLD

A library catalogue is a set of metadata records, whether stored in an online database or on filing cards.

Such a set can be treated as a collection of metadata or bibliographic records that describes a collection of information resources.

The SCONE database stores information about such analytic finding-aids, or collection-descriptions, in the same way as it does for any other collection.

The SCONE service only allows access to a collection-description as part of the CLD of the collection it describes. Currently, only the Collection name and electronic Location URL are displayed.

A CLD must be created to add a collection-description to the database, in the same way as for any collection, but will typically contain fewer components.

A **name** for the collection-description is necessary, along with the "catalogue" **type**, to create a Collection record, the minimum required for a CLD.

To add a collection-description CLD, follow the procedures for Creating [a new CLD](#).

An OPAC **URL** and **notes** about passwords, etc. are stored as part of an electronic Location record. Details about the systems librarian or other contact are stored in an Administrator Agent record, although it is not currently displayed in the SCONE service.

A card catalogue or shelf-list will usually have the same Location as the collection it describes, and it is not necessary to duplicate the information or add a relationship to the existing Location as it is displayed as part of the CLD of that collection.

Displaying a collection-level description (CLD) in SCONE

See the *Displaying a CLD in SCONE* section for further information.

Use the refresh button on the browser window to redisplay the CLD in its updated version.

Collections

Adding Collection details

Collection details include the **title**, **description**, **number of items**, **notes**, and **identifier** of the collection itself.

1		Check Collection Title in the SCONE database.
2	If the Collection already has a record in the database:	Update Collection details.
3	If a different Collection has the same Title:	Expand the Title.
4		Select the Add a New collection option from the Collections maintenance menu.
5		Update Collection details
6		End.

Checking Collection Title in SCONE database

Use the Search for a known collection title option of the Collections maintenance menu.

Date entry guidelines for Collections

Title

Contains the standard title or name of the collection.
It is **mandatory**, and must not be left blank.

- If the collection has no proper title, create one by adding the word "collection" to the organization or location name. Remove standard punctuation (full stops) from the organization name. Remove leading articles, eg. "The", even if they are part of the organization name. Remove redundant words from the resultant title; e.g. if the organization name contains "Library" in the main and sub-division parts.
- Capitalise only the first word and proper nouns (AACR2)
- Do not use double spaces.

Proper title?

Indicates whether the Collection Title is derived from the local name of the collection or assigned by SCONE.

- Set to Yes if it is the same as the local name, or its normalised form.
- Set to No if it is significantly different from the local name, or is assigned by SCONE.

Description

Contains a general statement about the collection.
It may include a summary of some or all of the scope, history, significant items, size, and current condition of the collection.

- Enter as a single paragraph.
- Use standard abbreviations.
- Do not use double spaces.

Size, etc.

Contains a standard statement about the number of item or parts, or other indication of extent, of the collection.

- Enter as a single paragraph.
- Use standard abbreviations.
- Do not use double spaces.

Arrangement

Contains a statement about the system of arrangement of the items in the collection. It may refer to a system of shelf-marking, document storage, reference numbering, physical grouping, etc.

- Enter as a single paragraph.
- Use standard abbreviations.
- Do not use double spaces.

Notes

Contains information not recorded elsewhere in the collection-level description.

- Enter as a single paragraph.
- Use standard abbreviations.
- Do not use double spaces.

Collection type categories

Indicates the SCONE standard type categories of the collection. It is **mandatory** to indicate the **Type**.

- Select at least one Type, and as many other categories that are relevant.

Local identifier

Contains an identifier for the collection used at its location. It may refer to a shelf-mark, storage area, etc.

Minimum contents

A Collection record must contain at least

- A Description.
- A Type.

Collection relationships

Adding Collection:Agent relationships

This relates a Collection to an Agent. There are several types of relationship, each defining the role of the Agent in the CLD. There are different labels for the reciprocal options of relating Collection to Agent or Agent to

Collection.

Some types of relationship store additional details for the CLD, as specified:

Is collected by / Collects

Defines a **Collector**.

Stores details of **accrual policy**.

Is owned by / Owns

Defines a collection **Owner**.

Stores details of **access charges**.

Contains items about / Is the subject of

Defines a collection **Subject**.

Contains items created by / Creates items in

Defines a **Creator**.

Contains items produced by / Produces items in

Defines a **Producer**.

The relationships can be created from Collection to Agent, or from Agent to Collection.

Use the **Relate a collection: To an agent** option of the Collections maintenance menu.

Use the **Relate an agent: To a collection** option of the Agents maintenance menu.

Collection:Agent relationships

- Collection:Is-Collected-By:Agent
- Collection:Is-Owned-By:Agent
- Collection:Has-Subject:Agent
- Collection:Is-Created-By:Agent
- Collection:Is-Produced-By:Agent

A Collection can have more than one Agent related to it, with the same Agent in more than one type of relationship, and the same relationship with more than one Agent.

Date entry guidelines for the Collection:Is-Collected-By:Agent relationship

Accrual policy

Indicates the accrual policy applied by the Agent to the Collection.

The accrual policy determines the circumstances in which items are added to the Collection.

- Set to Active if the Agent actively seeks new items to add to the Collection.
- Set to Closed if the Agent no longer adds items to the Collection.
- Set to Partial/selective if the Agent actively seeks new items to add to a specified part of the Collection.
- Set to Passive if the Agent only adds items to the Collection if they are donated or deposited with the Agent by an external agent.

Date entry guidelines for the Collection:Is-Owned-By:Agent relationship

Access charges

Contains a statement of any charges imposed by the Agent for access to the Collection.

These may include fees for searching or copying items in the collection, and charges applied to specific categories of user.

- Use the standard abbreviation GBP (Great Britain Pounds), not the symbol, when giving prices.
- Enter as a single paragraph.
- Do not use double spaces.
- End the statement with a fullstop.

Collection:Collection relationships

- Collection:Has Part:Collection
- Collection:Is Part Of:Collection
- Collection:Is Described By:Collection
- Collection:Describes:Collection
- Collection:Is Related To:Collection

A Collection can have more than one Collection related to it.

Adding a Collection:Has-Part:Collection relationship

This relates two Collections in a hierarchical way, so that one is a super- or sub-collection of the other.

The standard names of each Collection must be known in advance.

The CLD uses data cascaded from its super-collection records, and will be updated when the relationship is added to the SCONE database.

Use the **Relate a collection: To another collection** option of the Collections maintenance menu, selecting the "Is a parent/super collection of" or "Is a child/sub collection of" relationship as appropriate.

Adding a Collection:Is-Described-By:Collection relationship

This relates a Collection to its collection-description CLD.

The standard names of the Collection and the Collection component of its collection-description must be known in advance.

The CLD uses data from the collection-description, and will be upgraded when the relationship is added to the SCONE database.

Use the **Relate a collection: To another collection** option of the Collections maintenance menu, selecting the "Is catalogued/described by" or "Is the catalogue of/describes" relationship as appropriate.

Add a Collection:Is-Located-In:Location relationship

This relates a Collection to its Location.

The CLD uses data from the related location record, and will be updated when the relationship is added to the SCONE database.

The relationship can be created from Collection to Location, or from Location to Collection.

Use the **Relate a collection: To a location** option of the Collections maintenance menu.

Use the **Relate a location: To a collection** option of the Locations maintenance menu.

Other Collection relationships

Collection:Has-Landscape:Landscape relationship

A Collection can belong to more than one Landscape.

Collection:Has-Language:Language relationship

A Collection can have more than one Language.

Collection:Has-MEG-Level:MEG Level relationship

A Collection can have more than one MEG Level.

Collection:Has-Music-notation:Music notation relationship

A Collection can have more than one Music notation.

Collection:Has-Publication:Publication relationship

A Collection can have more than one Publication.

Collection:Has-DDC22-number:DDC22 number relationship

A Collection can have more than one DDC22 number.

Collection:Has-LCSH-topic:LCSH topic relationship

A Collection can have more than one LCSH topic.

Collection:Has-Subject-scheme:Subject scheme relationship

A Collection-Description can have more than one Subject scheme.

Locations

Adding Location details

There are two types of Location: physical, and electronic.

Electronic Location details include the **name**, **URL**, and **notes** about the location.

Physical Location details include the **name**, **address**, and **notes about transportation** relevant to the location.

1		Check Location Name in the SCONE database.
2	If the Location already has a record in the database:	Update Location details.
		End.
3	If a different Location has the same Name:	Expand the Name.
4		Select the <u>Add a New location</u> option from the Locations maintenance menu.
5		Update Location details
6		End.

Checking Location Name in SCONE database

Use the Search for a known location name option of the Locations maintenance menu.

Data entry guidelines for Location

There are two types of Location. Each has a different set of details.

Physical location

Name

Contains the standard name of the location.
It is **mandatory**, and must not be left blank.

Address

Contains the postal address of the location.

- Enter up to three lines of address, excluding the town and postcode.
- Do not enter lines which duplicate information already in the Name of the location.

Town

Contains the town of the location.
It is **mandatory**, and a town must be chosen from the list..

- Select the town from the list.
- If the town is not on the list, abandon entry of the location without saving, then redo after the town has been added to the SCONE database.

Postcode

Contains the postcode of the location.

- Enter in upper-case.

Transport, etc.

Contains a standard statement about transportation facilities in the vicinity of the location. It may include a summary of some or all of the proximity of airports, railway and bus stations, local bus routes, and the availability of car parking.

- Enter as a single paragraph.
- Use standard abbreviations.
- Do not use double spaces.

Minimum contents

A Physical Location record must contain at least:

- A Name.
- A Town.

Electronic location

Name

Contains the standard name of the location. It is **mandatory**, and must not be left blank.

URL

Contains the Uniform Resource Locator or Web address of the electronic location. It is **mandatory**, and must not be left blank.

- Enter the full URL, including the http (or other) prefix.
- Enter in lower-case.

Notes

Contains information about the electronic location.

- Enter as a single paragraph.
- Use standard abbreviations.
- Do not use double spaces.

Minimum contents

An Electronic Location record must contain at least:

- A Name.
- A URL.

Location:Is-Administered-By:Agent relationship

A Location can have more than one Agent related to it; a Location may be administered by more than one Agent.

Adding a Location:Agent relationship

This relates a Location to an Agent.

This relationship defines the **Administrator** role of the Agent in the CLD.

This relationship stores details of the **opening hours** and other **conditions of access** of the Location, which can vary in special circumstances depending on the Administrator.

The relationship can be created from Location to Agent, or from Agent to Location.

Use the **Relate a location: To an agent** option of the Locations maintenance menu.

Use the **Relate an agent: To a location** option of the Agents maintenance menu.

Date entry guidelines for the relationship

Opening hours

Contains a SCONE standard statement of the opening hours of the Location.

- Use the SCONE standard terminology for days of the week.
- Use the SCONE standard terminology for times of day.
- Separate start and end time with a hyphen only: 0930-1700, 1300-1945.
- Group days with the same opening hours together, so that the opening hours are only given once: Mon-Wed 0900-1700 instead of Mon 0900-1700; Tue 0900-1700; Wed 0900-1700.
 - Such day groups can be contiguous or separate: Wed-Fri is contiguous; Mon, Wed, Fri is separate. 2 adjacent days are treated as contiguous: Mon-Tue.
 - Separate the start and end day of a contiguous group with a hyphen only: Tue-Thu.
 - Separate the component days of a separate group with a comma-space: Mon, Wed.
- Separate groups with a semicolon-space: Mon-Tue 0900-1700; Wed, Fri 0900-1300, Thu, Sat 0900-1100.
- List groups in the order of the first day of each group, with Mon coming first.
- If there is more than one set of opening hours, for each set give the "season" followed by colon-space and then the hours: Summer: Mon-Fri 0900-1700; Sat 1100-1500.
- Separate multiple opening hours sets with a fullstop-space: Term-time: Mon-Sat 0900-1900. Vacations: Mon-Fri 0900-1700.
- Enter as a single paragraph.
- Do not use double spaces.
- End the statement with a fullstop.

Notification before a visit

Contains the SCONE standard statement of what type of notification should be given in advance of a visit to the Location.

It is **mandatory**, and must not be left blank.

- Select the appropriate option from the list.

Access notes

Contains a statement about conditions of access to the Location imposed by the Agent, other than opening hours and notification.

These may include restrictions or permissions applied to specific categories of user.

- Enter as a single paragraph.
- Do not use double spaces.
- End the statement with a fullstop.

Agents

Add Agent details

There are two types of Agent: person, and organization.

Person Agent details include the **name**, **dates**, **role**, **short biography**, **telephone number**, **fax number**, **email address**, and **homepage URL** relevant to the person.

Organization Agent details include the **name**, **short history**, **telephone number**, **fax number**, **email address**, and **homepage URL** relevant to the organization.

- | | | |
|---|---|---|
| 1 | | Check Agent Name in the SCONE database. |
| 2 | If the Agent already has a record in the database: | Update Agent details. |
| | | End. |
| 3 | If a different Agent has the same Name: | Expand the Name. |
| 4 | | Select the <u>Add a New agent</u> option from the Agents maintenance menu. |
| 5 | | Update Agent details |
| 6 | | End. |

Checking an Agent Name in SCONE database

Use the Search for a known agent name option of the Agents maintenance menu.

Data entry guidelines for Agents

There are two types of Agent. Each has a different set of details.

Person

Honorific

Contains the honorific or title of address of the person.

Use standard abbreviations.

Forename(s)

Contains the SCONE standard forenames or given names of the person.

Surname

Contains the SCONE standard surname or family name of the person.
It is **mandatory**, and must not be left blank.

Postnominals

Contains the postnominals or official suffixes of the person.

These may include postgraduate educational awards, political or legal designations, and honorary awards.

Use standard abbreviations, with no spaces.
Separate each postnominal with a space.

Extension

Contains SCONE standard additions to the name not recorded elsewhere.
These may include titles of nobility, expansions of forename initials, and other distinctive information.

Dates

Contains the years of birth and death of the person, where relevant.

Enter as four digit years, separated by a hyphen.
Leave blank if no dates are known.
If the year of death is not known, or not relevant, enter the year of birth followed by a hyphen.
If the year of birth is not know, or not relevant, enter a hyphen followed by the year of death.

Role

Contains a statement about the role of the person.
This is currently limited in the SCONE database to SLIR entries, where it records the job title of the person.

Enter as a single paragraph.
Do not use double spaces.

Biography

Contains a brief biography of the person.

Enter as a single paragraph.
Do not use double spaces.
End the statement with a fullstop.

Telephone

Contains the telephone number of the person.

Enter in international format.
Use spaces, not hyphens, to separate number groups.
Enter extension numbers preceded by "x", after the main number and separated by a space.

Fax

Contains the fax number of the person.

Enter in international format.
Use spaces, not hyphens, to separate number groups.

Email

Contains the email address of the person.

Enter in standard format.

Homepage

Contains the Uniform Resource Locator or Web address of the website of the person.

Enter the full URL, including the http prefix.
Enter in lower-case.

Minimum contents

A Person Agent record must contain at least

- A Surname

Organization

Name

Contains the SCONE standard name of the organization, in standard format.
It is **mandatory**, and must not be left blank.

Role

This field is not currently used in the SCONE database.

History

Contains a brief history of the organization.

Enter as a single paragraph.
Do not use double spaces.
End the statement with a fullstop.

Telephone

Contains the telephone number of the organization.

Enter in international format.
Use spaces, not hyphens, to separate number groups.
Enter extension numbers preceded by "x", after the main number and separated by a space.

Fax

Contains the fax number of the organization.

Enter in international format.
Use spaces, not hyphens, to separate number groups.

Email

Contains the email address of the organization.

Enter in standard format.

Homepage

Contains the Uniform Resource Locator or Web address of the website of the organization.

Enter the full URL, including the http prefix.
Enter in lower-case.

Logo URL

Contains the Uniform Resource Locator or Web address of a small image of the logo of the organization.

Enter the full URL, including the http prefix.
Enter in lower-case.

Minimum contents

An Organization Agent record must contain at least

- A Name

Agent relationships

Agent:Has-Part:Agent or Agent:Is-Part-Of:Agent relationship

An Agent can have more than one Agent related to it, but there are specific restrictions:

Person Agent:Has-Part:(Person or Corporate) Agent is not allowed.	A person or organization cannot be part of another person.
Corporate Agent:Is-Part-Of:Corporate Agent can only have one instance.	A subdivision of an organization cannot be part of another organization.

There is no restrictions on Person Agent:Is-Part-Of:Corporate Agent relationships, so a person can belong to more than one organization or corporate body.

Date entry guidelines for the relationship

Rank

Indicates the relative ranking order of part Agents with respect to their parent Agent.

- Enter as a number between 1 and 9.

Agent:Collection relationships

- Agent:Collects:Collection
- Agent:Owns:Collection
- Agent:Is-Subject-Of:Collection
- Agent:Creates:Collection
- Agent:Produces:Collection

An Agent can have more than one Collection related to it, with the same Collection in more than one type of relationship, and the same relationship with more than one Collection.

See the guidelines for the reciprocal relationships under Collections.

Agent:Administers:Location relationship

An Agent can have more than one Location related to it; an Agent may administer multiple Locations.

See the guidelines for the reciprocal relationships under Locations.

Other entities

Landscape

Title

Contains the title of the Landscape, in the form to be used for lists for searches and displays. It is **mandatory**, and must not be left blank.

Description

Contains a description of the Landscape.
Include information about intended users, subject or other focus, etc.

- Enter as a single paragraph.
- Do not use double spaces.

Language

Language

Contains the SCONE standard name of the language.
It is **mandatory**, and must not be left blank.

Code

Contains the SCONE standard code of the language.
It is **mandatory**, and must not be left blank.

Notes

Contains any notes about the language, its code, or scope and application in SCONE.

- Enter as a single paragraph.
- Do not use double spaces.

MEG Level

Rank

Contains the rank of the education level.
The lowest level is numbered 1.
It is **mandatory**, and must not be left blank.

List label

Contains the label for the SCONE listing of the education level.
It is **mandatory**, and must not be left blank.

MEG label

Contains the label for the education level.
It is **mandatory**, and must not be left blank.

- Current label is taken from the Metadata in Education Group schema.

Notes

Contains notes about the labels and their scope and application in SCONE.

- Enter as a single paragraph.
- Do not use double spaces.

Music notation

Notation system

Contains the name of the Music notation system, in the form to be used for lists for searches and displays.
It is **mandatory**, and must not be left blank.

Notes

Contains notes about the sectors and their scope and application in SCONE.

- Enter as a single paragraph.
- Do not use double spaces.

Publication

Publication

Contains the standard citation of the publication.
It is **mandatory**, and must not be left blank.

Notes

Contains any other information about the publication.

- Enter as a single paragraph.
- Do not use double spaces.

DDC22 number

DDC number

Contains the SCONE standard Dewey Decimal Classification number of the subject.
It is **mandatory**, and must not be left blank.

DDC verbal

Contains a verbal or topical heading for the classification.

Notes

Contains notes about the number or heading, or their scope and application in SCONE.

- Enter as a single paragraph.
- Do not use double spaces.

LCSH topic

LCSH

Contains the SCONE standard Library of Congress Subject Heading. It is **mandatory**, and must not be left blank.

Notes

Contains notes about the heading, or its scope and application in SCONE.

- Enter as a single paragraph.
- Do not use double spaces.

Subject scheme

Name

Contains the standard name of the subject scheme. It is **mandatory**, and must not be left blank.

Code

Contains the standard code of the subject scheme. It is **mandatory**, and must not be left blank.

Notes

Contains any notes about the subject scheme, its code, or scope and application in SCONE.

- Enter as a single paragraph.
- Do not use double spaces.

Choice of access points

Access points allow increased precision in searching for CLDs because they use **standard terminologies** to:

Resolve ambiguities in similar names and subject keywords.

Improve the definition of terms in the user interface.

Improve the definition of semantic relationships between terms in the user interface.

Allow semantically equivalent terminology sets to be displayed without additional maintenance.

These may include language translations, and vocabularies aimed at specific groups of users such as children or professionals.

Improve interoperability with other services.

Standard terminology sets

The SCONE database uses standard terminology sets for:

- Collection types.
- Countries.
- Dates.
- Days of the week.
- Educational levels.
- Languages.
- Names of persons and organizations.
- Regions
- Subject classifications.
- Subject topics.
- Times.
- Towns.

Use the guide below to determine which access points and terminology sets to use in a typical Collection-Level Description.

Collection types

A collection type is **mandatory** for all CLDs in the SCONE database.

This is a requirement of SCONE, to distinguish catalogues and other analytic finding aids from other collections in the database

Terminology set

CLDT enumerated list of collection types.

This set is maintained externally, and only established types should be used.

Countries

Options

Locations of physical collections

Address of the location.

Terminology set

Ordnance Survey (OS) gazetteer .

This set is maintained externally, and only established town names should be used.

Dates

Options

Special collections

Date range of collection accrual.

Date range of manufacture or production of items in the collection.

Terminology set

4-digit year only.

This set is implicit, and there are no look-up values; any year can be used.

Months and days are ignored; "10 November 1921" is represented as "1921".

Days of the week

Options

Locations of physical collections

Opening hours imposed by an agent on the location.

Terminology set

3-letter abbreviations.

This set is complete, and there are no look-up values:

"Mon"; "Tue"; "Wed"; "Thu"; "Fri"; "Sat"; "Sun".

Educational levels

Educational levels are added to CLDs to identify suitability for categories of user in educational information environments.

Environments may include portals for learning, teaching, and research.

Options

Collections of educational institutions and organizations

School libraries.

FE and HE libraries.

Special libraries supporting **professional development**.

Learned institution libraries and archives.

Special collections

Toy libraries.

Children's libraries.

Terminology set

The Metadata in Education Group List of UK educational levels

This set is complete.

Languages

Language access points are added to CLDs where a significant number of collection items contain written and spoken languages other than English.

Options

Special collections

Textual language of printed and written items.

Spoken language of audiovisual items.

Terminology set

ISO 693-2.

This set is maintained externally, and only established names should be used.

SCONE uses the 3-letter code option.

Names of persons and organizations

Access points for personal and corporate names are automatically generated by relating an Agent to a Collection or Location in the CLD.

The choice of which Agents to add is influenced by the prominence and historical significance of the Agent, and relevance to accessing and managing the collection.

Options

Special collections

Original and subsequent **Collectors**.

Historical and current **Owners**.

Item **Creators**.

Item **Producers**.

Persons and organizations as **Subjects**.

Location **Administrators**.

General collections

Current **Owners**.

Location **Administrators**.

Terminology set

Based on the Library of Congress Name Authority File (LCNAF).

If the name is already established in LCNAF, that form is used.

Other names are formulated according to AACR2.

Regions

Options

Locations of physical collections

Address of the location.

Terminology set

Ordnance Survey (OS) gazetteer .

This set is maintained externally, and only established region names should be used.

Substitute "and" for "&" in region names, e.g. "Perth and Kinross"

Subject classifications

A DDC22 classification number is **mandatory** for all **top-level** CLDs in the SCONE database. This is a requirement for interoperability with the HILT terminologies service.

Subject classifications should also be added to CLDs for sub-collections as indicated.

Options

Special collections

Classification number of specific subject.

Terminology set

Dewey Decimal Classification edition 22 (DDC22).

This set is maintained externally, and only established numbers should be used.

Subject topics

Options

Special collections

LCSH **topical headings**.

Date ranges.

General collections

RCO Conspectus **subject strengths**.

This is maintained via Research Collections Online.

Terminology set

Library of Congress Subject Headings (LCSH).

This set is maintained externally, and only established headings should be used.

Times

Options

Locations of physical collections

Opening hours imposed by an agent on the location.

Terminology set

4-digit, 24-hour representations.

Pad to 4 digits with leading zeroes; do not separate hours and minutes with any punctuation mark.

This set is implicit, and there are no look-up values; any legitimate hour/minute combination can be used.

"0930"; "1000"; "1345"; "2335".

Towns

Options

Locations of physical collections

Address of the location.

Terminology set

Ordnance Survey (OS) gazetteer .

This set is maintained externally, and only established town names should be used.

Substitute "and" for "&" in the names of conjoined towns, e.g. "Bonnyrigg and Lasswade"

Maintaining a CLD

CLDs require maintenance:

- When details change.
- If more structure is desired.
Information from the unstructured description field of a Collection record can be moved to Agent and Location records.
- If additional access points are required.
- When additional information about the collection becomes available.

Procedures for maintaining a CLD

Care should be taken when updating an existing CLD because of the SCONE database features for:

- Re-using Agent and Location records for different CLDs.
- Inheriting information from CLDs for super-collections.
- Using standards.
- Interoperating with other networked services.
The SCONE database is used by several services such as CAIRNS and SPEIR.
- Redisplay the CLD at every stage of updating.

Before updating any Collection, Location, or Agent, every CLD related to it should be checked to ensure the changes do not have a negative impact on other CLDs.

Displaying a collection-level description (CLD) in SCONE

See the Displaying a CLD in SCONE section for further information.

Digital collections

Collections of digital resources made available online are treated in the same way as any other collection. Some aspects of such collections require additional guidance:

Collection title

There is likely to be more choice in determining the collection title. Print-based collections will usually have a standard title because it is used to cite the collection in publications and exhibitions. Digital collections may not have a standard title for a variety of reasons, for example because the collection has not been assigned a formal title, or it is the result of a project with an unsuitable title, etc.

The homepage of a digital collection may actually offer three or more choices for a title:

The words most prominently displayed on the homepage, possibly prefaced with "Welcome to ..." or similar messages.

The words at the head of the homepage, again perhaps with a preface message.

Words in the text of the homepage which indicate the title of the collection.

The title appearing in the browser title bar, and encoded with the tag <Title> in the HTML source of the homepage.

A title encoded with the tag <Meta> in the HTML source.

Collection-description (catalogue) location

Many digital collection websites incorporate access to a collection-description or catalogue of the digital resources. The catalogue may consist of structured metadata with search facilities, unstructured metadata with keyword searching, or browsable lists of resource descriptions.

A facility for searching keywords in the full text of the resources themselves is not considered to be an analytical finding-aid, and is not treated as a collection-description in SCONE. Instead, a note should be entered on the Collection record.

If the catalogue has a separate URL within the digital collection website, then that URL is treated as its electronic Location.

If the website is framed, or there is no separate URL for the catalogue, then the electronic Location of the collection and its catalogue will be the same. The same Location record is used, with both Collection and Collection-description related to it by IsLocatedIn. If necessary, clarification can be made in a note on the Collection record.

The SCONE service

SCONE is the Scottish Collections Network.

It provides descriptions of collections held in Scottish libraries, museums and archives, and collections about Scottish topics held elsewhere. These descriptions can be searched by collection name and location, and by the names of associated persons and organizations including collectors, collection owners and administrators, and the subjects covered by the collections.

Where available, links to digital collections or online finding aids such as catalogues can be used to discover further information about the collections and their contents.

The information displayed in collection-level descriptions and selection lists used in SCONE is assembled from the SCONE relational database using structured query language (SQL). Macromedia ColdFusion scripts are used to process the SQL statements and apply HTML to the results so that the information can be displayed in Web browsers.

The ColdFusion (.cfm) scripts are processed in real-time, so changes to the database are immediately available to users of the service. **It is important that updated records are checked in the service to ensure that no errors have been made.** The service can be accessed in a new browser window during updating by using the button displayed on main SCAMP pages.

Displaying a CLD in SCONE

It is often useful to display a CLD when updating the SCONE database:

To monitor progress as each stage is completed.
To display the effects of data cascade from the CLDs of super-collections.
To ensure that the CLD is displaying correctly in SCONE.
To check for errors.
To check for completeness.

There are several ways of displaying a CLD from SCAMP:

- Use the Show button available on the page for adding or editing a Collection record.
- Use the SCONE button available on main SCAMP pages, and then use the Search for words in collection titles option.
- Open a new browser window and go to URL: <http://scone.strath.ac.uk/service/>, and then use the same search option.

The CLD is displayed in a new browser window in each case.

Further information about SCONE

Further information about the SCONE service and database can be found in project reports:

Technical and functional description of the SCONE demonstrator service

(<http://scone.strath.ac.uk/FinalReport/SCONEFPNXB1.pdf>) (SCONE project final report; Annexe B.1)

[Technical and functional description of the Scottish Collections Access Management Portal \(SCAMP\) demonstrator service](http://scone.strath.ac.uk/FinalReport/SCONEFPNXB2.pdf) (<http://scone.strath.ac.uk/FinalReport/SCONEFPNXB2.pdf>) (SCONE project final report; Annexe B.2)

[Extending the SCONE collection descriptions database for cc-interop](http://ccinterop.cdjr.strath.ac.uk/Document)

(<http://ccinterop.cdjr.strath.ac.uk/Document>) (Report for Work Package B of the cc-interop JISC project)