Configure the create close copy fields

Learn about configuring the fields to be used when copying a catalogue record in OLIB.

About create close copy configuration

This information is for system managers and relates to the Create Close Copy method used by cataloguers when cataloguing Titles.

The Create Close Copy function allows the cataloguer to create a new title record which is a copy of an existing record in the database. It is particularly useful in acquisitions for ordering of new editions and for an easy method of adding annual reference works to stock.

OLIB copies across a default set of fields into the new duplicate record; however the system manager can configure which fields are copied from the original record to the new duplicate record.

This configuration can be:

- system wide
- by Media Type

If there is no configuration at Media Type level, then system wide rules are used.

There are 2 domains where you can view and edit the title copying configuration:

- **Cataloguing Reference Data> Title Copying Config**
  
  Use this domain to configure which fields are copied. There are 2 searches Copying Configuration by Attribute (for field level configuration); Copying Configuration for Domain level records (for domain level options).

- **Cataloguing Reference Data> Media Types: Title Copying Configuration**
  
  Shows which tables and fields are marked for copying or not, for a given Media Type. Optionally use this to make Media Type specific changes only.

In Searches> Titles the domain contains fields in the TITLES database table; it also contains fields from other database tables, e.g. TITLEAUTHS, TITLEPHYSICAL, TITLENOTES. By default, most of these title related domains are copied when using Create Close Copy. In practice you might want to keep a domain in general set to Copy=Yes, but for specific attributes (fields) set Include in Copy = No. For example TITLEPHYSICAL domain to Copy=Yes; Subfield Sequencing and Punctuation attribute (field) Include in Copy=No. Alternatively you might want to copy all the fields normally copied, but make an exception for a given Media Type, e.g. E-books.
View which fields are copied

You can view the fields currently being copied:

1. Go to Cataloguing Reference Data> Title Copying Config.
2. Select the Other Search: Copying Configuration for domain level records.
3. Enter wildcard % in Domain to search. Switching to Table View is recommended.

OLIB displays all the title related domains and in the Copy? column indicates whether the fields in that domain are copied.

Using the Title Copying Config domain above is recommended for system wide changes; optionally using the toggle action is recommended for Media Type specific changes.

Note that you cannot see the Titles domain here - this is in order to avoid setting Copy = No.

Limit copying configuration by media type

When you are using the title Create Close Copy method, the configuration below allows you to prevent fields being copied for a specified Media Type.

Title copying config domain

1. Go to Cataloguing Reference Data> Title Copying Config and obtain the title related domains in a hit list as above.
2. Select the relevant title related domain fields, e.g. Title Physical by checking the box in the hit list. The fields in Title Physical are copied by default for all Media Types.
3. In Other Actions select Toggle Copying for Media Type(s)
4. OLIB displays a window listing media types.
5. Check the box to select the Media Type(s) for which the title physical fields should not be copied, e.g. E-book.

This means that whenever you use the Create Close Copy method on E-book records, the Title Physical information is not copied.

Media types domain

Additionally, there are 2 list boxes visible in Cataloguing Reference Data.

Open a media type record and view the Media Types: Title Copying Configuration sheet. This shows which tables and fields are marked for copying and not for copying for the currently displayed Media Type. A list box action on these lists allows you to enable or disable copying of the selected item for this Media Type. You may choose this method for making Media Type specific changes.
Change copying configuration

You can display the full details of a title related domain, e.g. Title Physical, and specify which Attributes (fields) should be included with the Create Close Copy method. It is recommended you use **Title Copying Config** to do this.

1. Go to **Cataloguing Reference Data > Title Copying Config**.
2. Select the search **Copying Configuration for domain level records**.
3. Use a wildcard % or some other search to list the relevant title related domains, e.g

   Alternative Titles
   Title Authors
   Title Cart. Codes
   Title Controlnos
   Title Notes
   Title Physical
   Title Prices
   Title Publishers
   Title Series
   Title Subjects

4. Click on the link, e.g. Title Physical, to display full details.
5. Select an **Attribute** from the drop down, e.g. **Subfield Sequencing and punctuation** and set **Include in Copy** Yes/No. For example, set to No (assuming Title Physical domain in general = Yes).

   Location field is not currently implemented, please leave.

Title control numbers

By default these are not copied by the Create Close Copy method. If you do enable Control Numbers for copying, you can then configure them to be copied by control number type.

1. Go to **Cataloguing Reference Data > Control Number Types**.
2. Modify the relevant control number type and set **Inc. in Copying** = Yes.

By default, title control numbers will not be copied unless their Control Number Type specifies their inclusion in the process.

Copies values

By default OLIB does not include the Copies information when you use the Titles Create Close Copy method. To include Copies information, display the Titles related domains as described above and click on Copies. Set **Include in Copy?** = Yes.

When the cataloguer uses the Create Close Copy method, Title copies will be duplicated. This will be without barcodes,
irrespective of whether the Barcode field has been flagged for copying.

OLIB can apply a sequential system generated barcode. To enable this go to OLIB Defaults: Cataloguing Defaults: Generate Barcodes.

Note types

It is possible to exclude title notes from the Create Close Copy process by Note Type.

In Cataloguing Reference Data> Note Types, if you set Incl. in Copying? = No, title notes with this Note Type will not be copied to the new title record by the Create Close Copy process.

1. Go to Cataloguing Reference Data> Note Types.
2. Search for the relevant Note Type, e.g. Cumulative Index.
3. Switch to modify and set Incl. in Copying? = No.

To improve performance and consistency when copying multiple titles, the configuration is cached for 5 minutes - it may be a few minutes between a change to configuration and a change in behaviour.