

Australian/New Zealand Standard™

**Information and documentation—  
Bibliographic data element directory for  
use in data exchange and enquiry**



## **AS/NZS ISO 8459:2013**

This Joint Australian/New Zealand Standard was prepared by Joint Technical Committee IT-019, Information and Documentation, Information Technology—Learning, Education, Training and Research. It was approved on behalf of the Council of Standards Australia on 19 April 2013 and on behalf of the Council of Standards New Zealand on 8 April 2013.  
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*This Standard was issued in draft form for comment as DR AS/NZS ISO 8459.*

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# Australian/New Zealand Standard™

## Information and documentation— Bibliographic data element directory for use in data exchange and enquiry

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## PREFACE

This Standard was prepared by the Joint Standards Australia/Standards New Zealand Committee IT-019, Information and Documentation, Information Technology—Learning, Education, Training and Research, to supersede AS/NZS 4450.1:1997, *Information and documentation—Bibliographic data element directory*, Part 1: *Interloan applications*, AS/NZS 4450.2:1997, *Information and documentation—Bibliographic data element directory*, Part 2: *Acquisitions applications*, AS/NZS 4450.3:1997, *Information and documentation—Bibliographic data element directory*, Part 3: *Information retrieval applications*, AS/NZS 4450.4:1999, *Information and documentation—Bibliographic data element directory*, Part 4: *Circulation applications* and AS/NZS 4450.5:2003, *Information and documentation—Bibliographic data element directory*, Part 5: *Data elements for the exchange of cataloguing and metadata*.

The objective of this Standard is to include data elements that are exchanged or are potentially exchanged among bibliographic systems.

This Standard is identical with, and has been reproduced from ISO 8459:2009, *Information and documentation—Bibliographic data element directory for use in data exchange and enquiry*.

As this Standard is reproduced from an International Standard, the following applies:

- (a) In the source text ‘this International Standard’ should read ‘this Australian/New Zealand Standard’.
- (b) A full point substitutes for a comma when referring to a decimal marker.

None of the normative references in the source document have been adopted as Australian or Australian/New Zealand Standards.

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## INTRODUCTION

This International Standard specifies and describes data elements required in the interchange of data between bibliographic systems (i.e. terminal or browser to computer or computer to computer). Data are interchanged for the purpose of starting or supporting a process. In order to transmit information required to support a process, the various elements of data in the interchanged messages must be fully understandable to the processes concerned.

This International Standard is seen as serving as a resource tool for interoperability among standards in bibliographic and library domains. It serves to harmonize the various different standards in these domains, comprising content schemas, protocols, profiles and models. To this end, data elements are defined at various levels because they may be defined at different levels in different protocols and schemas. The focus of the standard is to provide common definitions for data elements that are exchanged in protocol messages between systems.

System developers typically employ multiple standards and thus can profit from the identified inter-relationships and definitions in their database designs to achieve dynamic inter-operability when employing various standards.

This International Standard is also intended as a foundation for new standards. By inheriting element names and definitions, new standards can be achieved in an efficient way that directly relates them with existing standards in the field.

The inclusion of multiple examples and synonyms is also intended to assist in the translation of the standard into other languages.

The elements from the previously published five parts of ISO 8459 have been examined, updated where necessary and consolidated into a single set of elements such that this International Standard replaces these previous parts.

There are no referenced documents that are indispensable for the application of this International Standard. The Bibliography indicates sources consulted and used in the construction of this International Standard.

The standards cited in the Bibliography are examples for data elements in this International Standard but are not prescriptive.

The list also contains reference to the protocol and schema standards that were used to validate the data elements and concepts in this International Standard.

## AUSTRALIAN/NEW ZEALAND STANDARD

**Information and documentation—Bibliographic data element directory for use in data exchange and enquiry****1 Scope**

This International Standard describes, in the form of a directory, data elements used to support the processes of acquisition, resource description and cataloguing, searching and requesting loan or copy by an end user or an institution.

This International Standard includes data elements that are exchanged or are potentially exchanged among bibliographic systems. Those data elements that are not exchanged or not likely to be exchanged are ignored as they do not need standardization. Data elements being handled by transport protocols are not included, only those related to application level protocols.

As part of the consolidation phase, the data elements were broadly classed and sub-classed and are presented in two sequences, one by class and sub-class and the other by an alphabetical sequence. The alphabetical sequence includes examples and synonyms identified during the consolidation phase and those found in related interchange protocols and schemas.

As the grouping of data elements may differ among different protocols and record schemas, the data elements have been broadly classed and grouped, but no further structure has been made. Similarly, the sequence of data elements, whether or not a data element is mandatory or how it is structured and validated may vary according to its employment and consequently these data element attributes are outside the scope of this International Standard.

As new ways of inter-operating evolve, some new data elements may evolve, but the biggest change is usually in the way that existing data elements are grouped. For example, whether a purchase transaction is carried out manually or electronically, the base data elements of the transaction, requester, supplier and object of purchase remain constant, and this is reflected in the fact that most data elements in this International Standard originated several decades ago. To accommodate the potential changing grouping of data elements, an attempt has been made to identify common concepts across processes. For example, a new focus on end user delivery is causing diverse delivery options to be grouped together such that purchase, loan and inter-library loan processes are presented as alternatives; therefore, the identification of common concepts in all these processes is necessary for the development of seamless user interfaces.

**NOTE** The French version of this International Standard does not contain the column entitled “Synonyms” in Tables 2 to 12 for the following reasons:

- a large number of the variant data element names translate to the same data element name in French;
- a number of the variant data element names have been taken from standards which have not been translated into French.

The difference between the English and French versions is particularly noticeable in Table 13.

## 2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

### 2.1

#### **acquisition**

work of increasing and bringing up to date the stock of a library or documentation centre or service according to the collection policy of the institution

### 2.2

#### **address**

group of data elements that give a geographic or electronic location or place associated with an individual or institution

### 2.3

#### **attribute**

characteristic or property of a party or item

### 2.4

#### **authentication**

establishment of the identity of a person or party in a transaction

### 2.5

#### **authorization**

establishment of rights to services once the identity of a requester has been ascertained via an authentication process

### 2.6

#### **authority record**

record in a cataloguing system that describes, analyses and controls the standardized form of a name, subject, series or other heading

### 2.7

#### **bibliographic resource**

entity, either serial or non-serial, that forms the basis for a single resource description

### 2.8

#### **bibliographic record**

record in a cataloguing system that describes, analyses and controls a bibliographic resource

### 2.9

#### **booking**

reservation of an item or a location for a fixed time period and duration

### 2.10

#### **catalogue record**

record in a cataloguing system that describes, analyses and controls bibliographic, authority or holdings data

### 2.11

#### **cataloguing**

process of compiling a record for inclusion in one or more catalogues or indexes, which describes an entity and assists in its retrieval

### 2.12

#### **circulation**

work of controlling the loan and supply, user identification, status, return, recall, associated fees, bookings and reservations for items or copies thereof of the physical holdings of a library

**2.13****character string**

combination of letters, digits, punctuation marks or other symbols

**2.14****component**

unique bibliographic part of a set, such as a volume of a serial or multi-volume work

**2.15****copy**

tangible instance of a bibliographic resource or set, whether physical or electronic, comprising one or more pieces

**2.16****data element**

basic unit of identifiable and definable data, having a data element name represented by a tag as identifier and one or more values for expressing one or more particular facts

**2.17****data element directory**

listing of data elements with specifications of representative data element values, as appropriate

**2.18****data element group**

set of related data elements

**2.19****data element group name**

one or more words in a natural language identifying a data element group

**2.20****data element name**

one or more words in a natural language identifying a data element

**2.21****data element value**

fact expressed by codes, digits or natural language corresponding to the data element description and representation

**2.22****database**

collection of machine-readable information organized so that it can be easily accessed, managed and updated

**2.23****finance**

data elements concerning monetary information associated with a transaction

**2.24****holdings**

information that describes, analyses and controls copies associated with a bibliographic resource

**2.25****holdings record**

record in a cataloguing system that describes, analyses and controls holdings associated with a bibliographic record

**2.26****holdings statement**

summary of the locations of a specific bibliographic resource and, optionally, the units of that item held at a location

**2.27****identifier**

data string or pointer that establishes the identity of an item, institution or person alone or in combination with other elements

**2.28****information retrieval**

action, methods and procedures for recovering information on a given matter or references to pertinent documents from stored data

**2.29****interloan****inter-library loan**

loan of a document or documents from one institution to another or the supply of a substitute for the requested document or documents

**2.30****loan**

temporary transfer of custody of a copy to another individual or institution

**2.31****message**

structured combination of data elements used in a transaction

**2.32****metadata**

structured data associated with data that describe the data or provide additional information not contained within the data themselves

**2.33****party**

person or group performing a role in relation to the business of a specific community or domain

**2.34****piece****item**

unit of a copy on which transactions can be made, such as a physical part that can be lent or reserved or an electronic file that can be downloaded or accessed

**2.35****record**

group of data elements usually treated as a unit and often organized into sub-units called fields, which identifies, describes and facilitates retrieval of an entity

**2.36****representation**

method by which a particular data element value is expressed using one or more numbers, letters or symbols

**2.37****request**

transaction that initiates purchase, loan, inter-library loan, copy or access to an item

**2.38****reservation**

request by a person or group to be placed on a holding (waiting) queue for a bibliographic resource that is temporarily unavailable; also called a hold

**2.39****resource**

work, created as a result of intellectual effort, that may be expressed in physical or digital form

**2.40****result set**

group of metadata records, citations or other information units retrieved by a search

**2.41****scan**

positioning within an index or other ordered data sequence in order to retrieve and to view index entries by moving forwards and backwards within the sequence

**2.42****selective dissemination of information****SDI**

service that re-enacts a standard search or searches against one or more databases to provide regular updated information

**2.43****search**

structured query describing data elements and their values necessary for retrieving data from a database

**2.44****serial issue**

unit of a bibliographic resource that is issued in successive parts at regular or irregular intervals and intended to be continued indefinitely

**2.45****session**

period of time during which a user is connected online to a system

**2.46****set**

collection of components of a bibliographic resource including multi-volume publications and resources published serially, often received by a subscription purchase

**2.47****tag**

identifier allocated for use in place of a data element name or data element group name

**2.48****task**

operation performed by a system that may be performed online, in background or in batch mode, thus not necessarily tied to a specific session

**2.49****transaction**

creation or modification of a message required to support a process

### 3 Directory

#### 3.1 General

The directory is organized, by class and sub-class, into a series of tables. The data element name is the persistent identifier. A table is given for each class, and within the class, table row numbers have been assigned so that when this International Standard is translated into other languages, there is an easy reference to each data element and a clear sequence. The table row numbers are not unique, as each table has its own sequence and they are not intended to be used as persistent identifiers of the data elements.

Table 1 summarizes the classes.

**Table 1 — Summary of classes**

| Class                                      | Subclause | Table number |
|--------------------------------------------|-----------|--------------|
| Address                                    | 3.2.1     | 2            |
| Database record                            | 3.2.2     | 3            |
| Finance                                    | 3.2.3     | 4            |
| Holdings (physical or electronic copies)   | 3.2.4     | 5            |
| Party                                      | 3.2.5     | 6            |
| Party — Group                              | 3.2.6     | 7            |
| Party — Person (involved in a transaction) | 3.2.7     | 8            |
| Request                                    | 3.2.8     | 9            |
| Resource                                   | 3.2.9     | 10           |
| Search (including database elements)       | 3.2.10    | 11           |
| Transaction                                | 3.2.11    | 12           |

## 3.2 Organization of elements by class and sub-class

### 3.2.1 Organization by “Address” class

**Table 2 — Class: Address**

| Row | Class   | Sub-class          | Data element name         | Description                                                                                                                                                        | Examples                                                                                                                                             | Synonyms                               |
|-----|---------|--------------------|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| 01  | Address |                    | Address                   | Group of data elements that give a geographic or electronic location or place associated with an individual or institution                                         | Address of user                                                                                                                                      | Communication details                  |
| 02  | Address | Address            | Address label             | Code, word or phrase that defines the nature of a given address where there are multiple addresses associated with an institution or individual                    | Business address, Home address, Parents' address                                                                                                     |                                        |
| 03  | Address | Address            | Address role              | Word or code that indicates the type of message or mail that is sent to an address where there are multiple addresses associated with an institution or individual | Agency address role type, Billing address, Delivery address, Invoice address, Return to address, Ship to, Shipping address, User address information | Address instruction, Address role type |
| 04  | Address | Address            | Address status            | Code, word or phrase that indicates which address of a series of addresses associated with an institution or individual is preferred                               |                                                                                                                                                      | Current address flag                   |
| 05  | Address | Address            | Address type              | Indicates the form of communication associated with an address, physical or electronic                                                                             |                                                                                                                                                      | Delivery method type                   |
| 06  | Address | Address            | Contact person            | Name of an individual associated with an address in a particular role                                                                                              | Custodian, Invoice enquiries, Reference enquiries                                                                                                    | Care of                                |
| 07  | Address | Address            | Date/time address invalid | Date and time from which an address is no longer valid for use                                                                                                     | Agency address: valid to date, User address: valid to date                                                                                           |                                        |
| 08  | Address | Address            | Date/time address valid   | Date and time from which an address is valid for use                                                                                                               | Agency address: valid from date, User address: valid from date                                                                                       |                                        |
| 09  | Address | Address            | Unstructured address      | Address where the components of the address are not distinguished and where the structure may be limited to the inclusion of line breaks                           |                                                                                                                                                      |                                        |
| 10  | Address | Electronic address | e-delivery description    | Human readable text identifying an electronic delivery service                                                                                                     |                                                                                                                                                      |                                        |

Table 2 (continued)

| Row | Class   | Sub-class          | Data element name           | Description                                                                                                                         | Examples                                                                       | Synonyms                                                              |
|-----|---------|--------------------|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| 11  | Address | Electronic address | e-delivery details          | Information concerning the nature of electronic delivery of a particular document                                                   |                                                                                |                                                                       |
| 12  | Address | Electronic address | e-delivery service          | Name of an electronic delivery service                                                                                              |                                                                                |                                                                       |
| 13  | Address | Electronic address | Electronic address          | Unique identifier used to identify a device or location within a communications network or service                                  | Administration email, Email address, IP address (Internet Protocol), Telephone | Electronic address data, Telecom service address, Telenetwork address |
| 14  | Address | Electronic address | Electronic address type     | Form of electronic communication used by an address, including electronic mail, Internet Protocol (IP) address and telephone number |                                                                                |                                                                       |
| 15  | Address | Electronic address | Electronic delivery service | Group of data elements providing details of how a document should be delivered electronically                                       |                                                                                | Name or code                                                          |
| 16  | Address | Electronic address | Electronic delivery time    | Normal interval between a request and electronic delivery provided by an electronic delivery service                                |                                                                                | Delivery time                                                         |
| 17  | Address | Electronic address | Electronic mail identifier  | Unique number assigned to an electronic mail box or service connection                                                              |                                                                                | Electronic address, Telenetwork address                               |
| 18  | Address | Electronic address | Telecommunication carrier   | Code, word, phrase or initialism used to identify the telecommunications carrier facilities being used to access a remote system    |                                                                                | Telecom service identifier                                            |
| 19  | Address | Electronic address | Telefacsimile number        | Telecommunications number used for sending and receiving telefacsimiles                                                             |                                                                                |                                                                       |
| 20  | Address | Electronic address | Telephone number            | Unique number assigned to a telephone line                                                                                          |                                                                                |                                                                       |
| 21  | Address | Physical address   | Address line                | Phrase, usually numbered, intended to be used for printing or displaying an address with the address elements in sequence           | Line 1, Line 2                                                                 | Address detail, Address part                                          |
| 22  | Address | Physical address   | Building                    | Phrase used to identify a particular edifice within a building complex                                                              |                                                                                | Building name, House name                                             |
| 23  | Address | Physical address   | City                        | Word or phrase used to identify an urban area, including a city, suburb or postal area                                              |                                                                                |                                                                       |
| 24  | Address | Physical address   | Country                     | Word or phrase used to identify a country                                                                                           |                                                                                |                                                                       |

Table 2 (continued)

| Row | Class   | Sub-class        | Data element name        | Description                                                                                                                 | Examples                                                    | Synonyms  |
|-----|---------|------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|-----------|
| 25  | Address | Physical address | Delivery service         | Code, word or phrase that indicates the mail service that may be used to deliver to an address                              | Campus mail, Internal courier, National mail service        | Transport |
| 26  | Address | Physical address | District                 | Word or phrase identifying a sub-entity within a country, including a parish, county or district, usually not an urban area |                                                             | Locality  |
| 27  | Address | Physical address | Location within building | Code, number and/or phrase used to identify a location within a building or building complex                                | Children's library, Level 4, Reserve reading room, Suite 42 |           |
| 28  | Address | Physical address | Physical address         | Group of data elements giving location information for an institution or person                                             | Structured address                                          |           |
| 29  | Address | Physical address | Physical address type    | Characteristics of an address that may restrict delivery services                                                           | Post office box address, Postal address                     |           |
| 30  | Address | Physical address | Post office box          | Number of a receptacle assigned by a postal authority for saving mail for later collection                                  |                                                             |           |
| 31  | Address | Physical address | Postal code              | Code assigned by the postal authorities of a country that uniquely identifies an address or group of addresses              |                                                             |           |
| 32  | Address | Physical address | Region                   | Word or phrase identifying a large area within a country including province, state and department                           |                                                             |           |
| 33  | Address | Physical address | Street name              | Phrase used to identify a route within a city, rural or local area, including street, road, boulevard and avenue            |                                                             | Street    |
| 34  | Address | Physical address | Street number            | Number and/or phrase used to identify a location of a building within a route                                               |                                                             |           |

### 3.2.2 Organization by “Database record” class

**Table 3 — Class: Database record**

| Row | Class           | Sub-class  | Data element name               | Description                                                                                                                                                            | Examples                                                                                                                   | Synonyms                                           |
|-----|-----------------|------------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
| 01  | Database record |            | Record                          | Group of data elements usually treated as a unit and often organized into sub-units called fields, which identifies, describes and facilitates retrieval of an entity  | Catalogue record, Metadata record                                                                                          |                                                    |
| 02  | Database record |            | Record wrapper                  | Packet within a message that combines a database record with its schema identifier                                                                                     |                                                                                                                            |                                                    |
| 03  | Database record | Attributes | Attributes                      | Group of data elements, organized into sub-units called fields, which identifies, describes and facilitates retrieval of a particular entity                           |                                                                                                                            |                                                    |
| 04  | Database record | Attributes | Date/time of automatic deletion | Date and time on which the information in a database record may be deleted                                                                                             |                                                                                                                            |                                                    |
| 05  | Database record | Attributes | Date/time of last update        | Date and time of the latest change to the content of a record                                                                                                          |                                                                                                                            |                                                    |
| 06  | Database record | Attributes | Date/time record created        | Date and time of addition of a record on a database                                                                                                                    |                                                                                                                            | Date/time bibliographic record created             |
| 07  | Database record | Attributes | Date/time record modified       | Latest date and time of update of a database record                                                                                                                    |                                                                                                                            | Date/time bibliographic record updated, Time stamp |
| 08  | Database record | Attributes | Language of cataloguing         | Code or word indicating the language used for the creation of a metadata record or indicating the language of a bibliographic record or part of a bibliographic record |                                                                                                                            | Catalogue record language                          |
| 09  | Database record | Attributes | Link hierarchical relationship  | Code or phrase that indicates the level at which two bibliographic or authority records or parts of records are related                                                | Equal, Higher to lower, Lower to higher                                                                                    |                                                    |
| 10  | Database record | Attributes | Link type                       | Code or phrase that indicates the relationship between two resources or database records or parts of records                                                           | Acronym, Analytic, Broader form, Continuation, Earlier form, Later form, Narrower form, Pseudonym, Real name, Related form | Relation                                           |
| 11  | Database record | Attributes | Permission to use this record   | Indication of the extent to which a database record may be accessed or used                                                                                            |                                                                                                                            |                                                    |

Table 3 (continued)

| Row | Class           | Sub-class  | Data element name             | Description                                                                                                                                                                          | Examples                                                                                                                                                                                                                                                                              | Synonyms                                                  |
|-----|-----------------|------------|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|
| 12  | Database record | Attributes | Record availability flag      | Flag sent by a database provider, which indicates that a record is currently unavailable for modification or presentation                                                            | Record available, Record locked as per request, Record unavailable                                                                                                                                                                                                                    |                                                           |
| 13  | Database record | Attributes | Record character set          | Code or word used to identify a character set in which data is encoded or to indicate the capability of systems hardware and software to process data encoded in one or more scripts |                                                                                                                                                                                                                                                                                       | Catalogue record character set, Supported character set   |
| 14  | Database record | Attributes | Record retrieval elements     | Elements of a database record that may be used to retrieve the record                                                                                                                |                                                                                                                                                                                                                                                                                       | Agency element type, Item element type, User element type |
| 15  | Database record | Attributes | Record schema                 | Abstract record structure, providing a commonly understood definition of data elements within a record                                                                               | Dublin core, Edit/replace schema, GILS (Global Information Locator Service), Update schema, WAIS (Wide Area Information Server)                                                                                                                                                       | Metadata format, Schema, Schema id                        |
| 16  | Database record | Attributes | Record status                 | Code or phrase that indicates the stage in the progression of the update of a record or the degree of the completeness of an update                                                  | Deleted record                                                                                                                                                                                                                                                                        | Catalogue record status                                   |
| 17  | Database record | Attributes | Record syntax                 | Code or phrase identifying the structure of a record or records contained within a message                                                                                           | GRS-1 (General Record Syntax), HTML (Hypertext Markup Language), MAB (Maschinelle Austauschformat für Bibliotheken), MARC (Machine Readable Cataloguing), SGML (Standard Generalized Markup Language), SUTRS (Simple Unstructured Record Syntax) and XML (Extensible Markup Language) | Preferred record syntax, Record packing                   |
| 18  | Database record | Attributes | Record transliteration scheme | Code or phrase used to identify a scheme for transforming the characters of one writing script to another                                                                            | ISO 9, ISO 233, ISO 259, ISO 843, ISO 3602, ISO 7098                                                                                                                                                                                                                                  | Cataloguing record transliteration scheme                 |

**Table 3 (continued)**

| Row | Class           | Sub-class        | Data element name              | Description                                                                                                                                                         | Examples                                                                                                                                                                        | Synonyms              |
|-----|-----------------|------------------|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| 19  | Database record | Attributes       | Record type                    | Code or phrase that indicates the nature of the contents of a record                                                                                                | Authority record, Bibliographic record, Classification record, Community information record, Electronic resource metadata record, Holdings (copies) record                      | Catalogue record type |
| 20  | Database record | Authority record | Alternative heading form       | Phrase indicating a form of a name, subject, title or other heading type not used for database storage and retrieval but linked to another form of the same heading |                                                                                                                                                                                 | See reference         |
| 21  | Database record | Authority record | Authorized indicator           | Code indicating the effect of comparing a new heading with existing authority headings already in a database                                                        |                                                                                                                                                                                 |                       |
| 22  | Database record | Authority record | Authority information          | Group of data elements comprising information specific to an authority record                                                                                       |                                                                                                                                                                                 |                       |
| 23  | Database record | Authority record | Authority status               | Code or phrase indicating whether or not a heading has been authorized                                                                                              | Authorized, Unauthorized or undetermined                                                                                                                                        |                       |
| 24  | Database record | Authority record | Bibliographic occurrence count | Count of the number of bibliographic records in a database that are directly associated with an authority record                                                    |                                                                                                                                                                                 |                       |
| 25  | Database record | Authority record | Established heading            | Phrase indicating a standardized form of a name, title, subject or other heading type, designed to facilitate storage and retrieval of database records             |                                                                                                                                                                                 |                       |
| 26  | Database record | Authority record | Heading type                   | Code or phrase indicating a grouping of headings to which a particular heading relates for purposes of data comparison and standardization of heading data          | Collective uniform title, Corporate name, Family name, Name/collective uniform title, Name/title, Personal name, Territorial or geographic name, Topical subject, Uniform title |                       |
| 27  | Database record | Change data      | Change data                    | Group of data elements indicating data to be changed and the way they are changed                                                                                   |                                                                                                                                                                                 |                       |
| 28  | Database record | Change data      | Change data new value          | Phrase containing a data string that will replace a designated data string in a record or will be added to a record                                                 |                                                                                                                                                                                 | New value             |

**Table 3** (continued)

| Row | Class           | Sub-class   | Data element name                  | Description                                                                                                                                        | Examples                                                                                      | Synonyms          |
|-----|-----------------|-------------|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|-------------------|
| 29  | Database record | Change data | Change data new version identifier | Group of data elements identifying a field or other sub-element of a metadata record that should become the location of new or changed data        |                                                                                               |                   |
| 30  | Database record | Change data | Change data old value              | Phrase containing a data string that is to be replaced or deleted                                                                                  |                                                                                               | Old value         |
| 31  | Database record | Change data | Change data old version identifier | Group of data elements identifying a field or other element of a metadata record that contains data to be changed                                  |                                                                                               |                   |
| 32  | Database record | Change data | Conditional data identifier        | Group of data elements identifying a field or other sub-element of a metadata record that contains data to be tested before other data are changed |                                                                                               | Conditional field |
| 33  | Database record | Change data | Conditional data value             | Phrase containing a data string that is to be tested before other data are changed                                                                 |                                                                                               |                   |
| 34  | Database record | Change data | Date/time record lock expires      | Date and time on which a locked database record will automatically become available again for modification                                         |                                                                                               | Lock expiry       |
| 35  | Database record | Change data | Duplicate test flag                | Code or phrase indicating whether or not a record may duplicate another already in existence in a database                                         | Confirmed duplicate, Not a duplicate, Suspected duplicate                                     |                   |
| 36  | Database record | Change data | Edit/replace type                  | Code or phrase indicating the nature of editing to be performed on a record or nominated group of records                                          | Field delete, Field insert, Field replace, Subfield delete, Subfield insert, Subfield replace |                   |
| 37  | Database record | Change data | Record lock description            | Phrase indicating a reason for preventing changes to a database record and, optionally, indicating the party who set the lock                      |                                                                                               | Lock description  |
| 38  | Database record | Change data | Record lock set                    | Indication by a database server that an update restriction has been set on a database record                                                       |                                                                                               | Lock set          |
| 39  | Database record | Change data | Review code                        | Indication that a record submitted for update should be examined by a third party before a database record is updated                              |                                                                                               |                   |

Table 3 (continued)

| Row | Class           | Sub-class        | Data element name         | Description                                                                                                                                | Examples                                                                                                         | Synonyms                                                                            |
|-----|-----------------|------------------|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 40  | Database record | Change data      | Set lock flag             | Indication in a message that requests a change in the update status of a database record to restrict change to, or deletion of, the record | Lock record, Unlock record                                                                                       | Set lock                                                                            |
| 41  | Database record | Change data      | Update action             | Code that indicates the nature of the update being requested or performed                                                                  | Element update, Record delete, Record insert, Record replace                                                     | Action                                                                              |
| 42  | Database record | Change data      | Update action qualifier   | Code or phrase that indicates further information essential to the performance of a transaction update                                     | Bulk edit/replace qualifier, Edit/replace qualifier, Merge qualifier                                             | Action qualifier                                                                    |
| 43  | Database record | Change data      | Update information        | Group of data elements that give information essential to identify data to be updated and the way in which the update should be processed  |                                                                                                                  |                                                                                     |
| 44  | Database record | Copy information | Holdings encoding level   | Code that indicates the level of detail of a bibliographic holdings record                                                                 | Locations only (1), Locations plus general extent information (2), Locations plus summary extent of holdings (3) |                                                                                     |
| 45  | Database record | Description      | Free text note            | Phrase relating to a database record, carrying additional information                                                                      | Extra term information, Review note                                                                              | Note                                                                                |
| 46  | Database record | Description      | Free text note code       | Code, defined internally by a system, identifying the nature of the contents of a free text note                                           |                                                                                                                  | Free text note content, Instructions                                                |
| 47  | Database record | Identifier       | Check digit algorithm     | Name of an algorithm used for generating a check digit in an identification number                                                         |                                                                                                                  | Item number check digit algorithm                                                   |
| 48  | Database record | Identifier       | Record identifier         | Data string that identifies a database record including a catalogue or metadata record or document                                         |                                                                                                                  | Bibliographic record identifier, Catalogue record identifier, Identifier, Record id |
| 49  | Database record | Identifier       | Record identifier code    | Code or phrase used to identify a numbering system for a database or cataloguing record                                                    | Bibliographic record identifier code, LCCN (Library of Congress control number)                                  | Catalogue record identifier code                                                    |
| 50  | Database record | Record field     | Character set change flag | Code indicating that the data following the flag use a different character set from preceding data                                         |                                                                                                                  |                                                                                     |

Table 3 (continued)

| Row | Class           | Sub-class    | Data element name        | Description                                                                                                                                                                    | Examples | Synonyms                      |
|-----|-----------------|--------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------------------------|
| 51  | Database record | Record field | Field                    | Group of data elements forming a sub-unit of a record containing information relevant to a particular fact or facts relevant to the resource that the record describes         |          | Cataloguing field information |
| 52  | Database record | Record field | Field attributes         | Group of data elements defining attributes of data within a field of a database record                                                                                         |          |                               |
| 53  | Database record | Record field | Field description        | Phrase that defines the nature of the contents of a field of a database record                                                                                                 |          |                               |
| 54  | Database record | Record field | Field indicator          | Code associated with a field that supplies additional information about the contents of the field and about the relationships between the field and other fields in the record |          |                               |
| 55  | Database record | Record field | Field sequence number    | Number that defines the position of a field within a record                                                                                                                    |          |                               |
| 56  | Database record | Record field | Field tag                | Data string that serves as an identifier of a field                                                                                                                            |          | Field identifier, Field label |
| 57  | Database record | Record field | Non-sort begin           | Code indicating that the data following it are not used in the construction of an index entry, retrieval or filing key                                                         |          |                               |
| 58  | Database record | Record field | Non-sort end             | Code indicating the end of a data string that is not used in the construction of an index entry, retrieval or filing key                                                       |          |                               |
| 59  | Database record | Record field | Subfield                 | Defined unit of information within a field                                                                                                                                     |          |                               |
| 60  | Database record | Record field | Subfield attributes      | Group of data elements defining attributes of data within a subfield                                                                                                           |          |                               |
| 61  | Database record | Record field | Subfield identifier      | Code identifying an individual subfield within a field of variable length                                                                                                      |          |                               |
| 62  | Database record | Record field | Subfield sequence number | Number that defines the position of a subfield within a field within a database record                                                                                         |          |                               |
| 63  | Database record | Record field | Validation indicator     | Code or phrase indicating whether data within a record may or may not contain errors                                                                                           |          |                               |

### 3.2.3 Organization by “Finance” class

**Table 4 — Class: Finance**

| Row | Class   | Sub-class | Data element name                                  | Description                                                                                                                   | Examples                                | Synonyms                                                                                                                      |
|-----|---------|-----------|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| 01  | Finance |           | Monetary information                               | Group of data elements that indicate the financial transactions associated with a transaction or service                      |                                         | Cost, Fiscal transaction description, Fiscal transaction information                                                          |
| 02  | Finance | Account   | Account holder name                                | Phrase indicating a person or institution owning an account                                                                   | Credit card holder name                 |                                                                                                                               |
| 03  | Finance | Account   | Account identifier                                 | Code or phrase representing a budget or fund to which chargeable transactions are attributed                                  | Authorization account                   | Account details, Account number, Budget/fund information, Fund identifier, User fiscal account                                |
| 04  | Finance | Account   | Account institution                                | Phrase indicating the name of an institution that manages an account                                                          |                                         |                                                                                                                               |
| 05  | Finance | Account   | Date/time financial transaction validity commences | Date and time from which it is valid to post a transaction against an account                                                 |                                         | Fiscal transaction information: valid from date                                                                               |
| 06  | Finance | Account   | Date/time financial transaction validity ends      | Date and time after which it is no longer valid to post a financial transaction to an account                                 |                                         | Fiscal transaction information: valid to date                                                                                 |
| 07  | Finance | Account   | Date/time of accrual                               | Date and time on which a financial transaction is applied to an account, usually resulting in a change in the account balance |                                         | Accrual date                                                                                                                  |
| 08  | Finance | Account   | Financial account balance                          | Positive or negative sum of money currently available in an account                                                           |                                         | Account balance                                                                                                               |
| 09  | Finance | Account   | Financial action type                              | Processing required in applying a sum of money to a financial account                                                         |                                         | Fiscal action type                                                                                                            |
| 10  | Finance | Account   | Financial transaction identifier                   | Unique string or code that identifies a particular update within a financial account                                          | Related fiscal transaction reference id | Fiscal transaction reference id                                                                                               |
| 11  | Finance | Cost      | Amount                                             | Sum of money required for a purchase or service or fine                                                                       | Cost estimate                           | Acknowledged fee amount, Amount of fee, Charge amount, Cost, Fee amount, Monetary amount, Monetary value, Required fee amount |

**Table 4** (continued)

| Row | Class   | Sub-class | Data element name    | Description                                                                                                                                 | Examples                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Synonyms                                                                    |
|-----|---------|-----------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| 12  | Finance | Cost      | Currency code        | Code indicating the type of currency of a particular sum of money                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Currency, Order currency                                                    |
| 13  | Finance | Cost      | Discount             | Fixed amount or calculated percentage or rate by which a charge is reduced                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Expected terms                                                              |
| 14  | Finance | Cost      | Extended price       | Cost of a multi-copy order                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |
| 15  | Finance | Cost      | Fee type             | Code representing the reason for a charge such as a service charge, fine or fee                                                             | Administrative or service fee, Damage fine, Digitization fee, Insurance charge, Insurance charges, Insured for, Invoice charges, Item charge, Loan or rental fee, Net cataloguing service price, Overdue fine, Processing fee, Reference look-up fee, Replacement fee, Reproduction cost, Reservation fee, Service charge, Small invoice fee, Special charges and taxes, Supply or reproduction fee, Transportation charge, Unit cataloguing service price, User privilege fee | Charge type, Cost info type, Cost type, Fee reason, Fiscal transaction type |
| 16  | Finance | Cost      | Fee unit             | Code or phrase indicating the coverage of a fee amount                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Increment                                                                   |
| 17  | Finance | Cost      | List price           | Basic price of an item as published in a catalogue, price list or advertisement which may be subject to trade, quantity and other discounts |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |
| 18  | Finance | Cost      | Maximum cost         | Maximum amount that a requester will pay for a service                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Authorization limit, Cost constraint, Not to exceed amount, Will pay fee    |
| 19  | Finance | Cost      | Net price            | Unit price of one copy of an item ordered less any discount                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |
| 20  | Finance | Cost      | Not to exceed action | Action to be taken by a supplier when a request includes a maximum monetary value                                                           | Cancel balance of order exceeding amount, Cancel entire order, No action                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                             |

**Table 4** (continued)

| Row | Class   | Sub-class | Data element name         | Description                                                                                                    | Examples                                                                                            | Synonyms             |
|-----|---------|-----------|---------------------------|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|----------------------|
| 21  | Finance | Cost      | Price qualifier           | Word or code that denotes special factors determining the price of an item                                     | Bid price, Educational institution price, Firm price, Library price, Prepaid price, Remainder price | Price qualifier code |
| 22  | Finance | Cost      | Reciprocal agreement      | Arrangement between two parties to provide services or materials without charging                              |                                                                                                     | Consortium agreement |
| 23  | Finance | Cost      | Tax                       | Group of data elements indicating a supplementary charge imposed by a government on a service or item for sale |                                                                                                     |                      |
| 24  | Finance | Cost      | Tax amount                | Sum of money owed to a government agency relating to a service or item for sale                                |                                                                                                     |                      |
| 25  | Finance | Cost      | Tax identifier            | Code or phrase identifying a particular type of tax                                                            | GST (Goods and Services Tax), VAT (Value Added Tax)                                                 |                      |
| 26  | Finance | Cost      | Tax payee                 | Party responsible for collecting tax in relation to a particular service or item for sale                      |                                                                                                     |                      |
| 27  | Finance | Cost      | Unit cost                 | Rate applied to each unit of resources used in a session                                                       |                                                                                                     |                      |
| 28  | Finance | Cost      | Unit price                | Price of one copy of an item that can be ordered                                                               |                                                                                                     |                      |
| 29  | Finance | Credit    | Credit amount             | Monetary value or other count credited to a customer's account                                                 |                                                                                                     |                      |
| 30  | Finance | Credit    | Credit confirmation       | Code or phrase that confirms that a credit adjustment has been made to a customer's account                    |                                                                                                     |                      |
| 31  | Finance | Credit    | Credit justification      | Reason or reasons given explaining why a credit or rebate is requested or confirmed                            | Cancelled order, Defective merchandise, Error on invoice, Short assignment, Tax credit              |                      |
| 32  | Finance | Credit    | Credit memo date and time | Date and time on which a credit memo was issued                                                                |                                                                                                     |                      |
| 33  | Finance | Invoice   | Billing information       | Phrase indicating instructions for billing a particular party                                                  |                                                                                                     |                      |

Table 4 (continued)

| Row | Class   | Sub-class | Data element name              | Description                                                                                                                                                                                | Examples                                                              | Synonyms                                 |
|-----|---------|-----------|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|------------------------------------------|
| 34  | Finance | Invoice   | Deferred billing date and time | Invoice date that post-dates shipment                                                                                                                                                      |                                                                       | Delayed billing date and time            |
| 35  | Finance | Invoice   | Invoice copies                 | Number of copies of an invoice pertaining to a particular shipment                                                                                                                         |                                                                       |                                          |
| 36  | Finance | Invoice   | Invoice date and time          | Date and time on which an invoice was prepared that is used to determine the due date of payment                                                                                           |                                                                       | Billing date                             |
| 37  | Finance | Invoice   | Invoice identifier             | Number or phrase assigned by a party to identify an invoice                                                                                                                                |                                                                       |                                          |
| 38  | Finance | Invoice   | Invoice status                 | Phrase or code that indicates whether an invoice has been accepted and approved or paid                                                                                                    | Invoice cleared, Invoice paid                                         |                                          |
| 39  | Finance | Invoice   | Invoice total                  | Total amount to be paid for all line items of an invoice                                                                                                                                   |                                                                       |                                          |
| 40  | Finance | Payment   | Mode of payment                | Means used by an institution to pay an invoice or fee                                                                                                                                      | Bank cheque, Credit card, Deposit account, Voucher                    | Billing method type, Payment method type |
| 41  | Finance | Payment   | Payment authorization          | Group of data elements giving details of an institution that authorizes a request including authorization details, account details and period of time of the validity of the authorization |                                                                       |                                          |
| 42  | Finance | Payment   | Payment date and time          | Date on which a sum of money is sent or received to settle an invoice, fee, fine or charge in full or in part                                                                              |                                                                       |                                          |
| 43  | Finance | Payment   | Payment enclosures             | Information required by a supplier to accompany a payment in order to facilitate matching the payment to a corresponding invoice                                                           | Copy of invoice returned, Invoice number on cheque stub, No enclosure | Payment provided                         |
| 44  | Finance | Payment   | Self payment                   | Group of data elements giving details of how a requester intends to pay and the maximum he or she is prepared to pay                                                                       |                                                                       |                                          |

Table 4 (continued)

| Row | Class   | Sub-class | Data element name                          | Description                                                                           | Examples                                                       | Synonyms      |
|-----|---------|-----------|--------------------------------------------|---------------------------------------------------------------------------------------|----------------------------------------------------------------|---------------|
| 45  | Finance | Payment   | Terms of payment                           | Terms according to which a specific invoice or fee is to be paid                      |                                                                | Payment terms |
| 46  | Finance | Payment   | Transportation payment terms (terms added) | Indication of who pays shipping charges and when, including how they will be invoiced | Charged to customer, Collected on delivery, Pre-paid by vendor |               |

## 3.2.4 Organization by “Holdings” class

Table 5 — Class: Holdings (physical or electronic copies)

| Row | Class    | Sub-class    | Data element name              | Description                                                                                                                                                | Examples                                                                                                                                                                                                | Synonyms                                                                                   |
|-----|----------|--------------|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| 01  | Holdings |              | Holdings                       | Data structure describing a bibliographic resource or group of like or similar resources and one or more institution's copies of the resource or resources |                                                                                                                                                                                                         |                                                                                            |
| 02  | Holdings | Availability | Availability policy            | Phrase or structure indicating restrictions which apply in relation to loan, copy or access                                                                | Available for supply without return, Circulation limited by user type, In library use only, Indeterminate loan period flag, Non returnable flag, Not for loan, Overnight only, Semester loan, Term loan | Circulation category, Item use restriction type, Lending policy, Loan availability, Policy |
| 03  | Holdings | Availability | Available count                | Count of the number of physical or digital copies of a resource available for use or delivery in the context of a particular request                       |                                                                                                                                                                                                         |                                                                                            |
| 04  | Holdings | Availability | Available for                  | Code or phrase indicating the nature of service available in relation to a specific bibliographic resource                                                 | Digital copy, Loan, Online access, Physical copy, Reference look-up                                                                                                                                     |                                                                                            |
| 05  | Holdings | Availability | Available via                  | Code or phrase indicating a licensor or vendor facilitating access to a virtual holding of an electronic resource                                          |                                                                                                                                                                                                         |                                                                                            |
| 06  | Holdings | Availability | Circulation status             | Code that indicates the actual availability of a copy or group of copies for access, copy or loan                                                          | Available, Not available, Pending, Possibly available, Reported lost, Reported missing, Reported never borrowed, Reported returned                                                                      | Availability status                                                                        |
| 07  | Holdings | Availability | Electronic access restrictions | Code or phrase that indicates authentication or other requirements necessary in order to access an electronic resource at a specific address               | Access restricted URL based, Access with authorization, No online access, Preview only, Restrictions unspecified, Unrestricted access                                                                   | Access restrictions                                                                        |
| 08  | Holdings | Availability | Reservation policy             | Code or phrase indicating whether a party owning or managing a resource will accept reservations for the resource                                          | Will accept, Will not accept, Will possibly accept                                                                                                                                                      |                                                                                            |

Table 5 (continued)

| Row | Class    | Sub-class    | Data element name                 | Description                                                                                                                                                                                                                     | Examples                                                                                                               | Synonyms                          |
|-----|----------|--------------|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| 09  | Holdings | Availability | Summary policy                    | Group of data elements for a resource or set of resources and their copies summarizing availability policy, conditions and charges                                                                                              |                                                                                                                        |                                   |
| 10  | Holdings | Copy history | Borrower relationship to copy     | Code indicating the status of the relationship between a user and a specific copy of a resource                                                                                                                                 | Current booking user, Current borrower, Current requester, Current reserving user, Last borrower, Second last borrower |                                   |
| 11  | Holdings | Copy history | Copy history information          | Group of data elements giving information on the circulation transaction history of a copy or group of copies of a resource                                                                                                     |                                                                                                                        | Item history information          |
| 12  | Holdings | Copy history | Count period                      | Time period used to calculate a statistical total                                                                                                                                                                               | Total loans count period                                                                                               |                                   |
| 13  | Holdings | Copy history | Count period end                  | Last date of a period used for counting                                                                                                                                                                                         |                                                                                                                        |                                   |
| 14  | Holdings | Copy history | Count period start                | Earliest date of a period used for counting                                                                                                                                                                                     |                                                                                                                        |                                   |
| 15  | Holdings | Copy history | Date/time of copy's last activity | Date and time on which a copy or any copy or a group of copies was last involved in a circulation or delivery transaction that implied it was physically handled or electronically accessed, such as a loan, return or transfer |                                                                                                                        | Date/time of item's last activity |
| 16  | Holdings | Copy history | Date/time of last return          | Date and time on which a borrower returned a copy of a resource                                                                                                                                                                 |                                                                                                                        |                                   |
| 17  | Holdings | Copy history | Date/time of last transfer        | Date and time on which a copy of a resource changed from one location to another                                                                                                                                                |                                                                                                                        | Location: valid from date         |
| 18  | Holdings | Copy history | Last activity type                | Code or phrase indicating the nature of the last activity of a copy of a bibliographic resource                                                                                                                                 | Return, Stocktake, Transfer                                                                                            |                                   |
| 19  | Holdings | Copy history | Total access count                | Number of times that any copy of a resource or group of resources has been accessed in a given time period that implied physical handling or electronic access                                                                  |                                                                                                                        |                                   |
| 20  | Holdings | Copy history | Total circulation count           | Number of times that any copy of a resource or group of resources has been lent in a given time period, including external loans                                                                                                |                                                                                                                        |                                   |

Table 5 (continued)

| Row | Class    | Sub-class           | Data element name                  | Description                                                                                                                                                                | Examples | Synonyms                                      |
|-----|----------|---------------------|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------------------------------------------|
| 21  | Holdings | Copy history        | Total DCB count                    | Number of times that any copy of a resource or group of resources has been lent directly to an external user (Direct Consortia Borrowing) in a given time period           |          |                                               |
| 22  | Holdings | Copy history        | Total inter-library loans borrowed | Number of times that any copy of a resource or a group of resources has been borrowed from another library or copied from another library in a given period                |          | Total ILL borrowed                            |
| 23  | Holdings | Copy history        | Total inter-library loans count    | Number of inter-library loan transactions with external libraries in a given period, including incoming and outgoing loans and copies for a resource or group of resources |          | Total ILL count                               |
| 24  | Holdings | Copy history        | Total inter-library loans lent     | Number of times that any copy of a resource or a group of resources has been lent to another library or copied for another library in a given period                       |          | Total ILL lent                                |
| 25  | Holdings | Copy history        | Total loans count                  | Number of times that any copy or group of copies of a resource has been lent in a given time period, not including external loans                                          |          |                                               |
| 26  | Holdings | Copy history        | Total reservations count           | Number of times that a resource or copy of a resource was reserved for use in a given period                                                                               |          |                                               |
| 27  | Holdings | Copy identification | Accession number                   | Number assigned to a copy according to the order of its entry into a collection                                                                                            |          |                                               |
| 28  | Holdings | Copy identification | Copy number                        | Number or phrase added to a copy shelf locator to distinguish a particular copy from other copies of the same bibliographic resource                                       |          |                                               |
| 29  | Holdings | Copy identification | Copy shelf locator                 | String of characters that identifies a copy's or a set's shelving scheme within its sub-location in relation to other copies                                               |          | Call number, Local call number, Shelf locator |
| 30  | Holdings | Copy identification | Electronic locator                 | Text string or pointer such as a URL indicating availability and location of an electronic resource                                                                        |          |                                               |

Table 5 (continued)

| Row | Class    | Sub-class           | Data element name      | Description                                                                                                                                                                   | Examples                                                                        | Synonyms                                                                                                                                                                                                              |
|-----|----------|---------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 31  | Holdings | Copy identification | Permanent location     | Name or code of a section and/or collection of a library or other institution that normally stores a copy or set when it is not in use, on loan or on the reservation shelves |                                                                                 |                                                                                                                                                                                                                       |
| 32  | Holdings | Copy identification | Piece identifier       | Number or phrase that identifies a specific instance of a resource                                                                                                            | Accession number, Barcode, URI (Uniform Resource Identifier; either URL or URN) | Copy identification number, Copy identifier, Internal item identification, Item description, Item id, Item identification, Item identification number, Item identifier value, Unique item id, Visible item identifier |
| 33  | Holdings | Copy identification | Set                    | Collection of components of a bibliographic resource including multi-volume publications and resources published serially, often received by a subscription purchase          |                                                                                 |                                                                                                                                                                                                                       |
| 34  | Holdings | Copy identification | Set label              | Number or phrase serving to identify a set of copies such as a subscription for a resource that is published in multiple parts serially                                       |                                                                                 | Label                                                                                                                                                                                                                 |
| 35  | Holdings | Copy identification | Temporary location     | Name or code of a section and/or collection of a library that has been allocated to store a copy for a defined period, overriding the normal permanent location               |                                                                                 |                                                                                                                                                                                                                       |
| 36  | Holdings | Copy information    | Binding type           | Type of cover of a copy                                                                                                                                                       | Cloth, Library binding, Paperback                                               |                                                                                                                                                                                                                       |
| 37  | Holdings | Copy information    | Copy description level | Number or phrase indicating whether the detail given in the description of a multi-piece copy is for all pieces or the copy as a whole                                        |                                                                                 | Item description level                                                                                                                                                                                                |
| 38  | Holdings | Copy information    | Copy information       | Group of data elements providing details of a specific copy of a physical or digital resource                                                                                 |                                                                                 | Item description                                                                                                                                                                                                      |
| 39  | Holdings | Copy information    | Current location       | Name or code of a section within a library at which a copy is located at a particular point in time, or where it was last lent, returned or sighted                           |                                                                                 |                                                                                                                                                                                                                       |
| 40  | Holdings | Copy information    | Physical condition     | Description of the state of wear of a particular copy of a resource                                                                                                           | Physical condition details, Physical condition type                             | Technical defects                                                                                                                                                                                                     |

Table 5 (continued)

| Row | Class    | Sub-class        | Data element name                     | Description                                                                                                                                                                                                           | Examples | Synonyms                                          |
|-----|----------|------------------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------------------------------------------|
| 41  | Holdings | Copy information | Security marker                       | Device placed in a physical piece that is used by a machine sensor to detect whether or not the piece is being legitimately removed from a premises                                                                   |          |                                                   |
| 42  | Holdings | Copy information | Sensitization flag                    | Indication that a physical piece cannot be passed through a magnetic de-sensitization process                                                                                                                         |          |                                                   |
| 43  | Holdings | Copy information | Value                                 | Estimate of the cost of replacing a copy of a resource or an indication of the value placed on a copy                                                                                                                 |          | Appraised value, Value of item                    |
| 44  | Holdings | Holding          | Copies summary                        | Group of data elements summarizing the number of copies of a bibliographic resource or group of resources and their availability                                                                                      |          |                                                   |
| 45  | Holdings | Holding          | Copy                                  | Tangible instance of a bibliographic resource or set, whether physical or electronic, comprising one or more pieces                                                                                                   |          |                                                   |
| 46  | Holdings | Holding          | Date/time holdings statement reported | Latest date and time of update of a holdings statement                                                                                                                                                                |          |                                                   |
| 47  | Holdings | Holding          | Holding simple                        | Group of data elements containing information for a resource or group of resources summarizing number of copies, and the number actually available                                                                    |          |                                                   |
| 48  | Holdings | Holding          | Holding structured                    | Group of data elements providing descriptive information and an indication of the coverage, completeness, availability and service policy of a bibliographic resource that is published serially or in multiple parts |          |                                                   |
| 49  | Holdings | Holding          | Summary holdings statement            | Phrase indicating the beginning, ending and completeness of holdings of a bibliographic resource that is published in parts                                                                                           |          | Unstructured holdings, Unstructured holdings data |

## 3.2.5 Organization by “Party” class

Table 6 — Class: Party

| Row | Class | Sub-class  | Data element name              | Description                                                                                   | Examples                                                                                                                                                                                                                                                                                                                                                                                                        | Synonyms                      |
|-----|-------|------------|--------------------------------|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| 01  | Party |            | Transaction participant        | Data that identify an institution or individual that participates in a transaction            | From agency id, From system id, Initiator of most recent service, Intermediary id, On behalf of agency, Requester id, To agency id, To system id                                                                                                                                                                                                                                                                | Party                         |
| 02  | Party | Attributes | Borrowed copies count          | Total of copies of a resource on loan to a user at any given point in time                    |                                                                                                                                                                                                                                                                                                                                                                                                                 | Loaned item count value       |
| 03  | Party | Attributes | Date/time of registration      | Date and time on which a user's privileges begin                                              |                                                                                                                                                                                                                                                                                                                                                                                                                 |                               |
| 04  | Party | Attributes | Date/time registration expires | Date and time after which a user's privileges cease                                           |                                                                                                                                                                                                                                                                                                                                                                                                                 |                               |
| 05  | Party | Attributes | Participant type               | Indicates whether a participant is an institution, a system or a person                       |                                                                                                                                                                                                                                                                                                                                                                                                                 | Party type                    |
| 06  | Party | Attributes | Participant's function         | Word or code specifying the function or role performed by a party in a session or transaction | Authorizing officer, Bill to party, Buyer party, Database provider, Interloan function, Interloan officer, Intermediary, OpenURL referent, OpenURL referrer, OpenURL requester, Originator, Referent, Referrer, Request transfer message referent , Request transfer message referrer, Request transfer message requester, Requester, Ship from party, Ship to party, Supplier, User, Vendor/supplier, Verifier | Institution role, User's role |

Table 6 (continued)

| Row | Class | Sub-class       | Data element name                    | Description                                                                                                           | Examples                                                                                                                                                                                                                                                                                   | Synonyms                                                                                                                                                                                                                                                                                       |
|-----|-------|-----------------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 07  | Party | Identification  | Party identifier                     | Number or phrase presented to a system to identify an institution or person                                           | Additional party id, Client barcode, Initial requester id, Institution, Institution identification, Institution identifier, Institution identifier code, ISIL (ISO 15511), Library code or symbol, Person or institution symbol, Responder id, Supplier id, User's internal identification | Client id, Client identifier, Client identifier value, Party id, Unique agency id, Unique user id, User id, User identifier, User identification, User identification number, User identifier value, User's identifier, Visible user id, Visible user identifier, Visible user identifier type |
| 08  | Party | Privileges      | Access and use privileges            | Services permitted to a party upon successful connection to a system                                                  |                                                                                                                                                                                                                                                                                            | Access privileges, User privilege, User privilege description                                                                                                                                                                                                                                  |
| 09  | Party | Privileges      | Access or use privilege constraint   | Limitation applied to permission to gain access, borrow or use a resource or particular copy of a resource or service | Use in library only                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                |
| 10  | Party | Privileges      | Access or use privilege requirement  | Condition that must be met in order for access privileges to be valid for a party                                     | Presentation of identification; Signing a copyright statement                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                |
| 11  | Party | Privileges      | Date/time access privilege commences | Date and time when access privileges assigned to a party start                                                        |                                                                                                                                                                                                                                                                                            | Date of user privilege status, User privilege status: valid from date                                                                                                                                                                                                                          |
| 12  | Party | Privileges      | Date/time access privilege ends      | Date and time when access privileges assigned to a party terminate                                                    |                                                                                                                                                                                                                                                                                            | Date/time authorization expires, User privilege status: valid to date                                                                                                                                                                                                                          |
| 13  | Party | Privileges      | Privilege note                       | Free text note that qualifies or explains the current privileges of a party                                           | Overdue charges are waived temporarily                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                |
| 14  | Party | Privileges      | Security level                       | Phrase or code used to specify the right of a party to access information at various levels of confidentiality        |                                                                                                                                                                                                                                                                                            | Sensitive data flag                                                                                                                                                                                                                                                                            |
| 15  | Party | Privileges      | User group                           | Code or phrase given by a library or parent institution that signifies a user's normal privileges                     | House bound service, Military service and rank, Undergraduate                                                                                                                                                                                                                              | Agency user privilege type, User category, User type, User types                                                                                                                                                                                                                               |
| 16  | Party | Record relation | Date/time party relation commences   | Date and time when a relationship commences between an individual and an institution or between two individuals       |                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                |

Table 6 (continued)

| Row | Class | Sub-class       | Data element name             | Description                                                                                                             | Examples                                                                                                          | Synonyms                               |
|-----|-------|-----------------|-------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| 17  | Party | Record relation | Date/time party relation ends | Date and time when a relationship ends between an individual and an institution or between two individuals              |                                                                                                                   |                                        |
| 18  | Party | Record relation | Party relation                | Code or phrase that indicates an association between an individual or institution and another party                     |                                                                                                                   | Personal/corporate responsibility flag |
| 19  | Party | Record relation | Party relation type           | Code or phrase that defines the relationship between an individual or institution and another individual or institution | Child, Child institution, Client proxy for, Family member, Parent, Parent institution, Partner, Proxy for, Spouse | Personal relationship to user          |

### 3.2.6 Organization by “Party — Group” class

**Table 7 — Class: Party — Group**

| Row | Class         | Sub-Class | Data element name                    | Description                                                                                           | Examples | Synonyms                                                                                  |
|-----|---------------|-----------|--------------------------------------|-------------------------------------------------------------------------------------------------------|----------|-------------------------------------------------------------------------------------------|
| 01  | Party — Group | Name      | Abbreviated name                     | Short form of an institution's name                                                                   |          | Symbol for institution                                                                    |
| 02  | Party — Group | Name      | Main unit of institution name        | Base name of an institution, usually the name of the governing body                                   |          |                                                                                           |
| 03  | Party — Group | Name      | Name of institution                  | Word, phrase or initialism intended to identify an institution or corporation                         |          | Corporate name, Institution name, Library name, Organization name information, Party name |
| 04  | Party — Group | Name      | Official seal of institution         | Design, initial or other device serving to identify an institution in an official manner              |          |                                                                                           |
| 05  | Party — Group | Name      | Subordinate unit of institution name | Part of a name of an institution which defines a subdivision or department or unit of the institution |          | Institution section                                                                       |

### 3.2.7 Organization by “Party — Person” class

**Table 8 — Class: Party — Person (involved in a transaction)**

| Row | Class          | Sub-class         | Data element name                                  | Description                                                                                                                                       | Examples                                                | Synonyms                                            |
|-----|----------------|-------------------|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------|
| 01  | Party — Person | Identification    | Alternative identity information                   | Group of data elements presented to a system as an alternative identification of an individual                                                    |                                                         | Alternative user identity information               |
| 02  | Party — Person | Identification    | Person's affiliation                               | Name of the system that has registered a unique number or code to identify an individual                                                          |                                                         | User affiliation, User's affiliation                |
| 03  | Party — Person | Identification    | Service point                                      | Code or phrase representing a location within or outside a library from which a user borrows library material                                     |                                                         | Reservation collection location, User service point |
| 04  | Party — Person | Identification    | Signature                                          | Name, written in a person's own hand, often serving to indicate a person's accord                                                                 | Authorizing officer's signature, Originator's signature | Client signature                                    |
| 05  | Party — Person | Identification    | User's home library                                | Code or phrase representing a library at which a user is registered for borrowing and other privileges                                            |                                                         |                                                     |
| 06  | Party — Person | Identification    | User's home location or branch                     | Code or phrase representing a location within a library at which a user is registered for borrowing and other privileges                          |                                                         |                                                     |
| 07  | Party — Person | Identity document | Administrative authority issuing identity document | Government or other administrative authority issuing an identity document                                                                         |                                                         |                                                     |
| 08  | Party — Person | Identity document | Date/time identity document commences              | Date and time on which an individual's identity document becomes valid                                                                            |                                                         |                                                     |
| 09  | Party — Person | Identity document | Date/time identity document expires                | Date and time after which an individual's identity document will cease to be valid                                                                |                                                         |                                                     |
| 10  | Party — Person | Identity document | Identity document                                  | Group of data elements describing a document, licence or card used to identify an individual, issued by a government or other administrative body |                                                         |                                                     |
| 11  | Party — Person | Identity document | Identity document number                           | Unique number or character string assigned by an administrative authority to identify an individual                                               |                                                         |                                                     |

Table 8 (continued)

| Row | Class          | Sub-Class                | Data element name                                 | Description                                                                                                                                                                                   | Examples                                                                                 | Synonyms                                                       |
|-----|----------------|--------------------------|---------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------------------------------------------------------|
| 12  | Party — Person | Identity document        | Other information related to an identity document | Information related to an identity document which clarifies the relationship of an individual to an administrative body issuing identification                                                | Academic affiliation, Military service and rank, Visa information                        |                                                                |
| 13  | Party — Person | Identity document        | Type of identity document                         | Code or phrase indicating a document, licence or card used to identify an individual                                                                                                          |                                                                                          | Identifier type                                                |
| 14  | Party — Person | Organization information | Date/time project or certificate commences        | Date and time an individual user commenced work on a project or certificate                                                                                                                   |                                                                                          |                                                                |
| 15  | Party — Person | Organization information | Date/time project or certificate completes        | Date and time of expected completion of a project or an academic certificate, including degree, diploma and certificate                                                                       |                                                                                          |                                                                |
| 16  | Party — Person | Organization information | Organizational information                        | Phrase that provides information about a section of an organization with which a person is associated                                                                                         |                                                                                          | Additional general organization information, Department/school |
| 17  | Party — Person | Organization information | Person's activity                                 | Word, code or phrase that indicates a particular task being undertaken by an individual, either individually or as part of a group                                                            | AIDS (Acquired Immunodeficiency Syndrome) research team; Ph.D. in Physics                | Course name number, User's activity                            |
| 18  | Party — Person | Organization information | Title in organization                             | Phrase defining a person's role and function within an organization                                                                                                                           | Managing director, President, Professor, Research associate, Student, Visiting professor | User's title in organization                                   |
| 19  | Party — Person | Personal information     | Additional descriptive personal information       | Phrase containing information, defined by a local system, concerning an individual's relationship to that system                                                                              | Client other affiliation                                                                 | Miscellaneous user note, User note                             |
| 20  | Party — Person | Personal information     | Date of birth                                     | Day, month and year when an individual was born                                                                                                                                               |                                                                                          |                                                                |
| 21  | Party — Person | Personal information     | Language                                          | Code indicating the language in which an individual prefers to communicate                                                                                                                    |                                                                                          | Client contact language, User language                         |
| 22  | Party — Person | Personal information     | Minor flag                                        | Code indicating that an individual's age is lower than that of an adult and as a consequence another person, usually a parent, is responsible for his or her loans and financial transactions |                                                                                          |                                                                |
| 23  | Party — Person | Personal information     | Preferred contact mode                            | Code or phrase that indicates the means of communication preferred by an individual                                                                                                           |                                                                                          | Client contact mode                                            |

Table 8 (continued)

| Row | Class          | Sub-Class            | Data element name                 | Description                                                                                                                                                                        | Examples                        | Synonyms                                                                                             |
|-----|----------------|----------------------|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|------------------------------------------------------------------------------------------------------|
| 24  | Party — Person | Personal information | Privacy information               | Group of data elements to protect the confidentiality of personal information                                                                                                      |                                 | User privacy information                                                                             |
| 25  | Party — Person | Personal information | Related personal user information | Group of data elements identifying another individual or user related to a user                                                                                                    |                                 |                                                                                                      |
| 26  | Party — Person | Personal information | Sex                               | Code indicating the gender of an individual                                                                                                                                        |                                 |                                                                                                      |
| 27  | Party — Person | Personal information | Type of alternative information   | Code or phrase that defines the nature of alternative personal information                                                                                                         | Maiden name, Pseudonym or alias |                                                                                                      |
| 28  | Party — Person | Personal name        | Given name                        | Simple, double or compound name that distinguishes an individual within a family carrying a common name                                                                            |                                 | Client given name, User given name, Christian name                                                   |
| 29  | Party — Person | Personal name        | Initials                          | First letter of each component of a person's given name that distinguish an individual within a family carrying a common surname                                                   |                                 | Client initials                                                                                      |
| 30  | Party — Person | Personal name        | Numeric qualifier                 | Numeric element, either Arabic, Roman or other numeric type, that in conjunction with surname and given names, forms an integral part of a name, serving to identify an individual |                                 |                                                                                                      |
| 31  | Party — Person | Personal name        | Personal name                     | Group of data elements comprising the full name of an individual                                                                                                                   |                                 | Client name, Name information, Personal name information, Structured personal user name, User's name |
| 32  | Party — Person | Personal name        | Personal name unstructured        | Text string giving the name of an individual without the elements being delimited                                                                                                  |                                 | Unstructured personal name, Unstructured personal user name                                          |
| 33  | Party — Person | Personal name        | Prefix                            | Text string, placed before other personal name elements, that serves to clarify an individual's identity, but does not form an integral part of a name                             |                                 | Client prefix                                                                                        |
| 34  | Party — Person | Personal name        | Suffix                            | Text string placed on the end of a personal name that serves to clarify an individual's identity but does not form an integral part of a name                                      |                                 | Client suffix                                                                                        |

Table 8 (continued)

| Row | Class          | Sub-Class       | Data element name                    | Description                                                                                   | Examples                                                                  | Synonyms                     |
|-----|----------------|-----------------|--------------------------------------|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|------------------------------|
| 35  | Party — Person | Personal name   | Surname                              | Family name of an individual                                                                  |                                                                           | Client surname, User surname |
| 36  | Party — Person | Personal status | Date/time of user booking status     | Date and time on which a user's booking privileges last changed                               |                                                                           |                              |
| 37  | Party — Person | Personal status | Date/time of user loan status        | Date and time on which a user's loan privileges last changed                                  |                                                                           |                              |
| 38  | Party — Person | Personal status | Date/time of user reservation status | Date and time on which a user's reservation privileges last changed                           |                                                                           |                              |
| 39  | Party — Person | Personal status | Date/time of user's last activity    | Date of last transaction initiated by an individual                                           | Copy returned, Fee paid, Last loan, Reservation placed, Resource accessed |                              |
| 40  | Party — Person | Personal status | Fees outstanding                     | Total of all fees and fines owed by an individual to an institution                           |                                                                           |                              |
| 41  | Party — Person | Personal status | Party status note                    | Free text note that qualifies or explains the current status of a user                        | Borrower status note                                                      |                              |
| 42  | Party — Person | Personal status | User booking status                  | Code or phrase that may indicate a modification to a user's normal booking privileges         |                                                                           |                              |
| 43  | Party — Person | Personal status | User loan status                     | Code or phrase that may indicate a modification to a user's borrowing and other privileges    | User: block or trap                                                       | Client status, User status   |
| 44  | Party — Person | Personal status | User reservation status              | Code or phrase that may indicate a modification to a user's normal reservation privileges     |                                                                           |                              |
| 45  | Party — Person | Profile         | Profile starting date and time       | Date and time a set of preferences or privileges is activated for an individual by a system   |                                                                           |                              |
| 46  | Party — person | Profile         | Profile termination date and time    | Date and time a set of preferences or privileges is deactivated for an individual by a system |                                                                           |                              |
| 47  | Party — Person | Profile         | User profile                         | Data identifying various personal preferences and privileges                                  | Access privileges, Billing information, User's equipment                  |                              |

## 3.2.8 Organization by “Request” class

Table 9 — Class: Request

| Row | Class   | Sub-class     | Data element name                   | Description                                                                                                                         | Examples                                                                                                                      | Synonyms                                                 |
|-----|---------|---------------|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| 01  | Request | Authorization | Copyright declaration               | Agreement by a user to respect the terms of copyright in relation to copying or receiving a copy of a requested resource            |                                                                                                                               | Copyright compliance, Copyright declaration statement    |
| 02  | Request | Authorization | Copyright declaration date and time | Date and time on which a copyright declaration statement was signed by an individual                                                |                                                                                                                               |                                                          |
| 03  | Request | Authorization | Loan authorization                  | Statement that a loan has been approved                                                                                             |                                                                                                                               |                                                          |
| 04  | Request | Cancellation  | Confirm cancellation request        | Requester's instruction that a supplier confirm the cancellation of a specific purchase order                                       |                                                                                                                               |                                                          |
| 05  | Request | Cancellation  | Date/time of cancellation           | Date and time on which a request is cancelled, including purchase request, return request and credit request                        |                                                                                                                               | Cancel date                                              |
| 06  | Request | Cancellation  | Number of items cancelled           | Word or code used to indicate whether or not a cancellation request applies to the entire contents of a request                     |                                                                                                                               | Cancel quantity                                          |
| 07  | Request | Cancellation  | Reason for cancel                   | Requester's explanation for wanting to cancel a request                                                                             |                                                                                                                               |                                                          |
| 08  | Request | Cancellation  | Reason for return                   | Requester's explanation for wanting to return a requested item                                                                      | Arrived too late, Damaged, Order cancelled, Order duplicated, Overstock, Wrong binding, Wrong title ordered, Wrong title sent |                                                          |
| 09  | Request | Claim         | Claim number                        | Indicates the number of previous claims to a supplier or reminders to a borrower for a requested copy of a resource or copy on loan |                                                                                                                               | Claim history, Overdue notice number, Reminder level     |
| 10  | Request | Claim         | Date/time last issue received       | Date and time on which the last issue of a serial publication was received                                                          |                                                                                                                               |                                                          |
| 11  | Request | Claim         | Date/time of claim                  | Date and time on which a claim notice concerning the receipt or return of an item is sent or will be sent                           |                                                                                                                               | Claim date, Date recalled, Date/time overdue notice sent |

Table 9 (continued)

| Row | Class   | Sub-class | Data element name     | Description                                                                                                                                   | Examples                                                                                                                                    | Synonyms                                                          |
|-----|---------|-----------|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| 12  | Request | Claim     | Notice content        | Standard text string that is used in conjunction with dynamic details to create a claim or advice notice                                      |                                                                                                                                             |                                                                   |
| 13  | Request | Claim     | Notice type           | Code or phrase indicating the context of a notice sent to a party                                                                             | Claim, Overdue, Recall, Reservation available for collection                                                                                | Notice                                                            |
| 14  | Request | Claim     | Reason for claim      | Code or string that identifies a problem or problems resulting in a demand for rectification, usually supply or re-supply of a requested item | Damaged supply, Invoice not received, Overdue loan, Overdue supply, Request for early return of a loan                                      |                                                                   |
| 15  | Request | Claim     | Response to claim     | Notification by a supplier of the actions taken to rectify a problem with the receipt of a requested item                                     | Delay in publication, Never published, Not identified as cited, Out of print                                                                |                                                                   |
| 16  | Request | Detail    | Acquisitions priority | Word or code indicating the degree of urgency applying to a request for an item                                                               | Routine, Rush                                                                                                                               | Order priority code                                               |
| 17  | Request | Detail    | Acquisitions type     | Word or code describing the conditions under which an item is being acquired, permanently or temporarily                                      | Approval request, Confirmation, Copy request, Deposit, Exchange, Inter-library loan (ILL), Loan, Membership, Purchase, Shipped service type | ILL service type, Order type code, Request type, Service required |
| 18  | Request | Detail    | Back order code       | Instruction as to whether an unfilled order is to be retained by the supplier for future delivery                                             | Back order if not yet published, Back order if out of stock, Do not back order                                                              | Order fill terms                                                  |
| 19  | Request | Detail    | Cataloguing quantity  | Number of a cataloguing product including records, cards and kits requested to accompany an ordered item                                      |                                                                                                                                             |                                                                   |
| 20  | Request | Detail    | Cataloguing service   | Cataloguing products requested from a supplier vendor for an ordered item, including records, cards and kits                                  |                                                                                                                                             | Cataloguing instructions                                          |
| 21  | Request | Detail    | Date/time ordered     | Date and time on which a request for acquisition or loan was sent                                                                             |                                                                                                                                             | Date placed, Reference date                                       |
| 22  | Request | Detail    | Date/time selected    | Date and time on which an item is selected for ordering                                                                                       |                                                                                                                                             | Date of user request                                              |

Table 9 (continued)

| Row | Class   | Sub-class | Data element name                        | Description                                                                                                                                                       | Examples                     | Synonyms                               |
|-----|---------|-----------|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|----------------------------------------|
| 23  | Request | Detail    | Date/time subscription renewal effective | Date and time on which a renewal of a periodical subscription becomes effective                                                                                   |                              |                                        |
| 24  | Request | Detail    | Do not ship before date and time         | Date and time before which a shipment should not be sent                                                                                                          |                              | Earliest date needed                   |
| 25  | Request | Detail    | Expiry flag                              | Indication that a request may or may not have a limited validity period                                                                                           |                              |                                        |
| 26  | Request | Detail    | ILL request type                         | Indicates the complexity of an interloan request and the method used to manage possible suppliers                                                                 | Chained, Partitioned, Simple | Service request type, Transaction type |
| 27  | Request | Detail    | Invoicing instructions                   | Code or text indicating requirements for separate or combined invoices for a requested item or group of items                                                     |                              |                                        |
| 28  | Request | Detail    | Mandated action                          | Indicates that a responding application shall honour a request because the initiating application has already acted upon the update                               |                              |                                        |
| 29  | Request | Detail    | Multi-item indicator                     | Word or code used to indicate that a request such as an acquisitions transaction applies to more than one item                                                    |                              |                                        |
| 30  | Request | Detail    | Notice of non-receipt responsibility     | Statement that a requesting institution is required to notify a supplier in case of non-receipt of a requested item within a specified time period                |                              | Notice of non-receipt                  |
| 31  | Request | Detail    | Number of copies requested               | Indication of quantity requested of a particular requested item                                                                                                   |                              | Quantity ordered                       |
| 32  | Request | Detail    | Order line number                        | Sequential number pertaining to an item in a multi-item document or message                                                                                       |                              | Item number, Subline number            |
| 33  | Request | Detail    | Place reservation                        | Indication in a loan or copy request that a requestor wishes a reservation to be made if a resource or particular copy of a resource is not immediately available |                              | Place on hold                          |
| 34  | Request | Detail    | Purchase authorization                   | Statement or other indication that a purchase request has been validated                                                                                          |                              | Approved by                            |

Table 9 (continued)

| Row | Class   | Sub-class  | Data element name                   | Description                                                                                                                                 | Examples                                                                       | Synonyms                                                                                            |
|-----|---------|------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| 35  | Request | Detail     | Request conditions                  | Restrictions and prerequisites necessary for the fulfilment of a request                                                                    |                                                                                |                                                                                                     |
| 36  | Request | Detail     | Resource available in system        | Indication as to whether a resource suggested for acquisition is already available within a library                                         |                                                                                | Item available in system                                                                            |
| 37  | Request | Detail     | Resource desired in response        | Indicates that a requester desires an electronic resource be transmitted as part of a request response                                      |                                                                                | Resource desired                                                                                    |
| 38  | Request | Detail     | Resource identification instruction | Instruction to a supplier to identify a requested resource by specific data elements, such as identification number, author and title       |                                                                                | Item identification instruction                                                                     |
| 39  | Request | Detail     | Respond within                      | Word, code or phrase that indicates a time period, usually a number of days since the date of a request within which a response is required |                                                                                | Desired due date, Need before date, Response time                                                   |
| 40  | Request | Detail     | Search effort                       | Specification of the effort to be made in obtaining a requested resource                                                                    |                                                                                | Search type                                                                                         |
| 41  | Request | Detail     | Substitute option                   | Indication that another resource may or may not be substituted for a requested resource                                                     | Binding substitution, Different binding, Different edition                     | This edition only                                                                                   |
| 42  | Request | Detail     | Type of reproduction                | Physical form in which a requested copy is to be produced                                                                                   | Microform negative, Microform positive, Photocopy negative, Photocopy positive |                                                                                                     |
| 43  | Request | Identifier | Request identifier                  | Code, number or string that uniquely identifies a request                                                                                   | Local request number, Reference number, Standard request number                | Correspondence reference, Order number, Request identifier value, Request number, Unique request id |
| 44  | Request | Loan       | Date/time of renewal                | Date and time on which a copy on loan was renewed for a further loan period                                                                 |                                                                                | Date renewed                                                                                        |
| 45  | Request | Loan       | Date/time of return                 | Date and time on which a copy was returned from loan to a library location                                                                  |                                                                                | Date reported returned, Date returned                                                               |
| 46  | Request | Loan       | Renewal number                      | Number representing the number of times the time period of a loan has been extended                                                         |                                                                                | Renewal count                                                                                       |
| 47  | Request | Locations  | Possible locations                  | List of institutions that may possess a requested resource                                                                                  |                                                                                | Locations results, Possible suppliers, Send-to list                                                 |

Table 9 (continued)

| Row | Class   | Sub-class | Data element name                        | Description                                                                                                                                    | Examples                                                                                                                                                                                                                  | Synonyms                                                                                                                                            |
|-----|---------|-----------|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| 48  | Request | Locations | Possible locations — Already-trying list | Indication of possible sources that have already been approached and are not able to fulfill a request at a certain point in time              |                                                                                                                                                                                                                           | Already-trying list                                                                                                                                 |
| 49  | Request | Locations | Preferred supplier                       | Indicates a preference from a list of potential supply sources                                                                                 |                                                                                                                                                                                                                           | Preference                                                                                                                                          |
| 50  | Request | Locations | Sources checked                          | Listing of bibliographic sources, including union catalogues, that have been searched in attempting to identify or locate a requested resource |                                                                                                                                                                                                                           | Catalogues searched                                                                                                                                 |
| 51  | Request | Reply     | Conditions of use                        | Specification of restrictions imposed on the supply or use of a copy at the time of a request                                                  | May not be photocopied, No restriction, Prepayment, Renewable, Renewal not permitted, Reproduction restrictions, Use in air conditioned room only, Use in rare book room only, Use outside library building not permitted | Acknowledged item use restriction type, Availability, Conditions, Item use restriction type, Required item use restriction type, Shipped conditions |
| 52  | Request | Reply     | Date/time due                            | Date and time on which a copy is to be returned to the library or lending institution                                                          | Desired date for return, Desired due date, Location: valid to date                                                                                                                                                        | Date due, Date for return, Due date                                                                                                                 |
| 53  | Request | Reply     | Date/time of earliest recall             | Date and time before which it is not possible to recall a copy that is on loan                                                                 |                                                                                                                                                                                                                           |                                                                                                                                                     |
| 54  | Request | Reply     | Date/time of loan                        | Date and time on which a copy was lent to a user                                                                                               |                                                                                                                                                                                                                           | Date checked out                                                                                                                                    |
| 55  | Request | Reply     | Date/time resource available             | Date and time on which a resource will be ready for delivery or access                                                                         | Consumer on sale data                                                                                                                                                                                                     | Date available, Date/time item available, Date to send, Date will send, Earliest despatch date, Estimated date available, Expected ship date        |
| 56  | Request | Reply     | Reapplication date and time              | Date when a request should be resubmitted                                                                                                      |                                                                                                                                                                                                                           |                                                                                                                                                     |

Table 9 (continued)

| Row | Class   | Sub-class               | Data element name                        | Description                                                                                                                           | Examples                                                                                                                                                                            | Synonyms                      |
|-----|---------|-------------------------|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| 57  | Request | Reply                   | Reason unfulfilled                       | Explanation given for the permanent or temporary inability to fulfill a request                                                       | Copyright compliance lacking, Cost exceeds limit, In process, In use, Lost, Non-circulating, Not on shelf, Not owned, Not yet published, Out of print, Reason will supply           |                               |
| 58  | Request | Reply                   | Referral forwarded date and time         | Date and time when a request was forwarded to another potential supplier                                                              |                                                                                                                                                                                     |                               |
| 59  | Request | Reply                   | Reservation made                         | Indication that a reservation or hold has been placed for a requested resource that is temporarily unavailable                        |                                                                                                                                                                                     | Hold placed results           |
| 60  | Request | Reply                   | Retry results                            | Indication of temporary unavailability of a requested copy of a resource or temporary inability to supply as requested                | At bindery, Cost exceeds limit, In process, In use, Lacks copyright compliance, Not found as cited, On hold, On loan, On order, Prepayment required, Volume issue not yet available |                               |
| 61  | Request | Reply                   | Transaction results                      | Reason or reasons given for not immediately fulfilling a request                                                                      | Conditional, Estimate, Hold placed, Locations provided, Retry, Unfilled, Will supply                                                                                                |                               |
| 62  | Request | Reservation and booking | Booking location                         | Location within a library where a user has booked a particular copy of a resource for a particular time period                        | Reserve book room, Video branch library                                                                                                                                             |                               |
| 63  | Request | Reservation and booking | Date/time booking ends                   | Date and time on which a fixed time period reservation for a particular copy of a resource finishes for a particular user             |                                                                                                                                                                                     |                               |
| 64  | Request | Reservation and booking | Date/time booking starts                 | Date and time on which a user is scheduled to collect a copy of a resource reserved for a specific time period                        |                                                                                                                                                                                     |                               |
| 65  | Request | Reservation and booking | Date/time of reservation collection      | Date and time on which a user is scheduled to collect or has collected a reserved copy                                                |                                                                                                                                                                                     | Hold pickup date, Pickup date |
| 66  | Request | Reservation and booking | Date/time reservation advice notice sent | Date and time on which a notice indicating availability of a requested resource or a particular copy of a resource was sent to a user |                                                                                                                                                                                     |                               |

Table 9 (continued)

| Row | Class   | Sub-class               | Data element name                   | Description                                                                                                                                                  | Examples | Synonyms                                                                       |
|-----|---------|-------------------------|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|--------------------------------------------------------------------------------|
| 67  | Request | Reservation and booking | Date/time reservation expires       | Date and time after which a user no longer wishes to reserve a resource or a particular copy of a resource                                                   |          | Block or trap valid to date, Expiry date, Need before date, Pickup expiry date |
| 68  | Request | Reservation and booking | Date/time reservation required      | Earliest date and time on which a user wishes a reservation to become effective                                                                              |          | Block or trap valid from date                                                  |
| 69  | Request | Reservation and booking | Requested resources count           | Total number of resources on request for a person                                                                                                            |          | Requested copies count, Requested items count, Requested items count value     |
| 70  | Request | Reservation and booking | Reservation advice notice required  | Code that indicates whether or not a user requires an advice notice to be sent when a reserved resource or a particular copy of a resource becomes available |          |                                                                                |
| 71  | Request | Reservation and booking | Reservation and booking information | Group of data elements concerning reservations on resources and copies within a library collection and bookings for specific time periods                    |          |                                                                                |
| 72  | Request | Reservation and booking | Reservation queue length            | Count of the number of people in a reservation queue for a particular resource or a particular copy of a resource                                            |          | Hold queue length                                                              |
| 73  | Request | Reservation and booking | Reservation queue position          | Position of an individual in a reservation queue for a particular resource or a particular copy of a resource                                                |          | Hold queue position                                                            |
| 74  | Request | Reservation and booking | Reservation status                  | Indication of progress of a request to supply a particular resource or a particular copy of a resource                                                       |          |                                                                                |
| 75  | Request | Reservation and booking | Reservation target location         | Name of a location within an institution holding a resource or several resources that can fulfill an individual's reservation request                        |          |                                                                                |
| 76  | Request | Reservation and booking | Reservation type                    | Code or phrase that indicates the scope of a reservation, defining a group of resources and their copies to which a reservation applies                      |          | Block or trap type, Request scope type                                         |
| 77  | Request | Shipping and packing    | Bin number                          | Text string identifying a temporary storage location used during the transfer process of a physical piece                                                    |          |                                                                                |