

Classification Lookup (NEW)

It is possible to control the shelf reference assigned to records based on a set of rules linked directly to your classification thesaurus.

It is not required that your thesauri are called Classification and Shelf Reference, this provides the flexibility to use other existing Thesauri.

Setup Configuration

- In [system configuration maintenance](#) you need to set the name of the Thesauri you wish to use as your classification source.

Thesaurus Name for Look Up Suggestion

- Next set which field will be used to store your shelf reference.

Configuration dialog for Classification Lookup. The 'Shelf Reference' field is highlighted with a red box. The 'Classification Field' dropdown is also highlighted with a red box and set to 'Classification'. Other options include 'Text' for the field type, 'Office' for globalisation, and various search and validation settings.

✔ If using globalisation you must ensure both Thesauri set in the above options have globalisation enabled at the same level (i.e. office)

Setup Rules

The final setup step is to setup the rules for your classifications. for this navigate to Admin, then under **Setup- functions > Thesaurus > Classification Lookup**

You will then see an empty table. If you see an error message please re-check your setup.

Classification Lookup setup interface. It shows a 'Term to classify' input field with an '+Add' button, a 'Language' dropdown set to 'English', and an empty table with columns for Classification Terms, Shelf Reference, Incremental, Length, Use Free Numbers, and Actions. The table is currently empty, showing 'Page 1 of 0' and 'No records to view'.

The Language filter on the right will allow me to display the classification term in the table in my chosen language.

Using the box above the table start typing your first classification term. The suggestion will show possible matches, select the appropriate one and click **add**. This will add the term to the below table in edit mode.

Term to classify:

Conference	+Add
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Classification Terms	Shelf Reference	Incremental	Length	Use Free Numbers	Actions
Conference					
Conference	CON	<input type="checkbox"/>		<input type="checkbox"/>	  

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Once in edit mode for a term it will automatically set the shelf reference value to the first three letters of the classifications (CON). It is possible to change this if required, you may also include additional characters if you wish to separate numbers from the prefix, i have added a slash to my example. You can then set additional options if required as per the below.

Incremental - If enabled will allow numbers to be automatically generated and appended to the end of the term.

Length - Set the length of the incremental number, setting this to three will generate the format of 001

Use Free Numbers - If you have designated some shelf references as already in use and some as currently available, the system will use available numbers before generating the next in the sequence.

To save your new rule click the green save button. The grey close button will exist edit mode without saving your changes The Red reset icon will clear all settings from the rule allowing you to start again with its setup. This does not affect any catalogue records already linked to this classification.

Classification Terms	Shelf Reference	Incremental	Length	Use Free Numbers	Actions
conf					
Conference	CON/	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	  

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Continue this process until you have created rules for all classification terms you wish to generate shelf references for.

outside of edit mode you will see the following actions



Allows you to edit the classification rule.



Deletes the classification rule, this will not remove the shelf reference or classification from any records where it has previously been assigned.



This allows you to view currently used, available or free numbers and change their state if required.

Used & Available Numbers pop-up

Using this pop-up you are able to select certain numbers as being unavailable, this will prevent them from being used when assigned to catalogue records. Likewise you are able to set some numbers as being available. This is useful if you have a mixture of existing numbers which you need to allow and or deny.

The Orange **Not Available** button will mark numbers as unavailable

The **Available** button will make the number available and will be used if use free numbers is enabled.

Additional filters are available to show or hide Available and Used numbers.

Used & Available Numbers ✕

Classification: Next Number: Include: Used Available

Available ?	Shelf Reference	Actions
<input checked="" type="checkbox"/>	CON/001	<input type="button" value="✎"/>
<input checked="" type="checkbox"/>	CON/002	<input type="button" value="✎"/>
<input checked="" type="checkbox"/>	CON/003	<input type="button" value="✎"/>
<input checked="" type="checkbox"/>	CON/004	<input type="button" value="✎"/>
<input checked="" type="checkbox"/>	CON/005	<input type="button" value="✎"/>

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i In the above example i have set CON/001, CON/003, CON/004 as unavailable and CON/002 and CON/005 as available. This means when i assign a classification of conference to my catalogue record it will use CON/002 as the first available shelf reference. Once CON/002 and CON/005 have both been assigned the next one will be automatically generated as CON/006.

If you need to change the status for a number already marked as Available or Not Available you can enter the number you wish to change into the next number field and then click the appropriate button, this will change its status accordingly.