

Global Edits Technical Document

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Purpose

OLE provides the global edit documents to allow users to edit identical attributes across multiple records in a single document. This is available for Account, Account Delegate, Object Code, Sub Object Code, Organization Reversion and Holding/Items.

This document discusses about the various technical aspects of such global edit documents.

Dependencies (db tables)

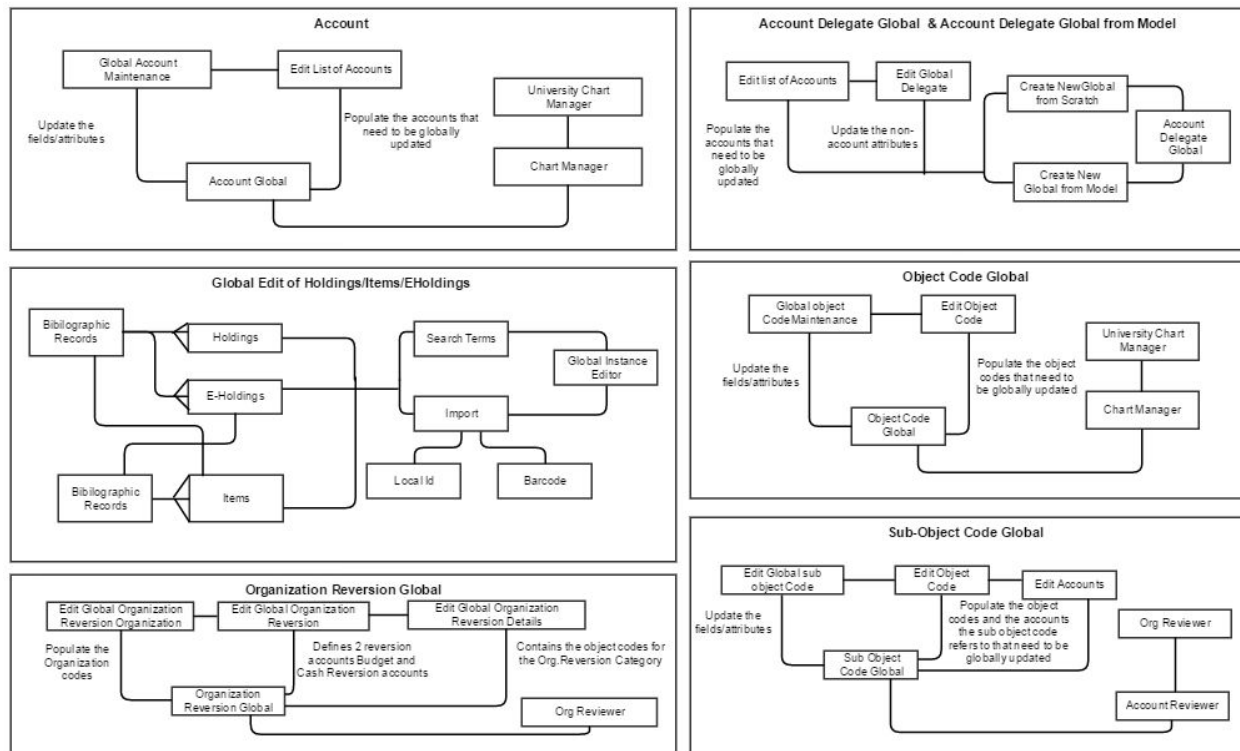
Tables used in Global Edits

CA_ACCT_CHG_DOC_T	Account Global
CA_ACCT_CHG_DTL_T	Account Global Detail
CA_DLGT_CHG_DOC_T	Account Delegate Global Detail
CA_ACCT_DELEGATE_GBL_T	Account Delegate Global
CA_OBJ_CD_CHG_DOC_T	Object Code Global
CA_OBJ_CD_CHG_DTL_T	Object Code Global Detail
CA_SUB_OBJ_CD_CHG_DOC_T	Sub Object Code Global
CA_SUB_OBJ_CD_CHG_DTL_T	Sub Object Code Global Detail
CA_ORG_RVRSN_CHG_DOC_T	Organization Reversion Global
CA_ORG_RVRSN_CHG_DTL_T	Organization Reversion Global Detail

Tables where Global Edits effects a change

CA_ACCOUNT_T	Account
CA_ACCT_DELEGATE_T	Account Delegate
CA_OBJECT_CODE_T	Object Code
CA_SUB_OBJECT_CD_T	Sub Object Code
CA_ORG_REVERSION_T	Organization Reversion
OLE_DS_HOLDINGS_T	Holdings
OLE_DS_ITEM_T	Item

Logical Data Model (Class Structure)



The different Global Edit documents don't have anything in common between them. Each Global document resides individually and independent of each other. The documents list attributes that can exist across all records and can hold similar values across multiple records.

The Global Edit of Holdings/Items/EHoldings allows the user to identify records to be edited using the search look-up or the import and then make the edits to all of the selected records in a single page. Holding level attributes such as Call Number, Ownership data, Location and Holding notes are allowed to be edited. Similarly, at the item level Location, item information such as item type, donor details are allowed to be edited.

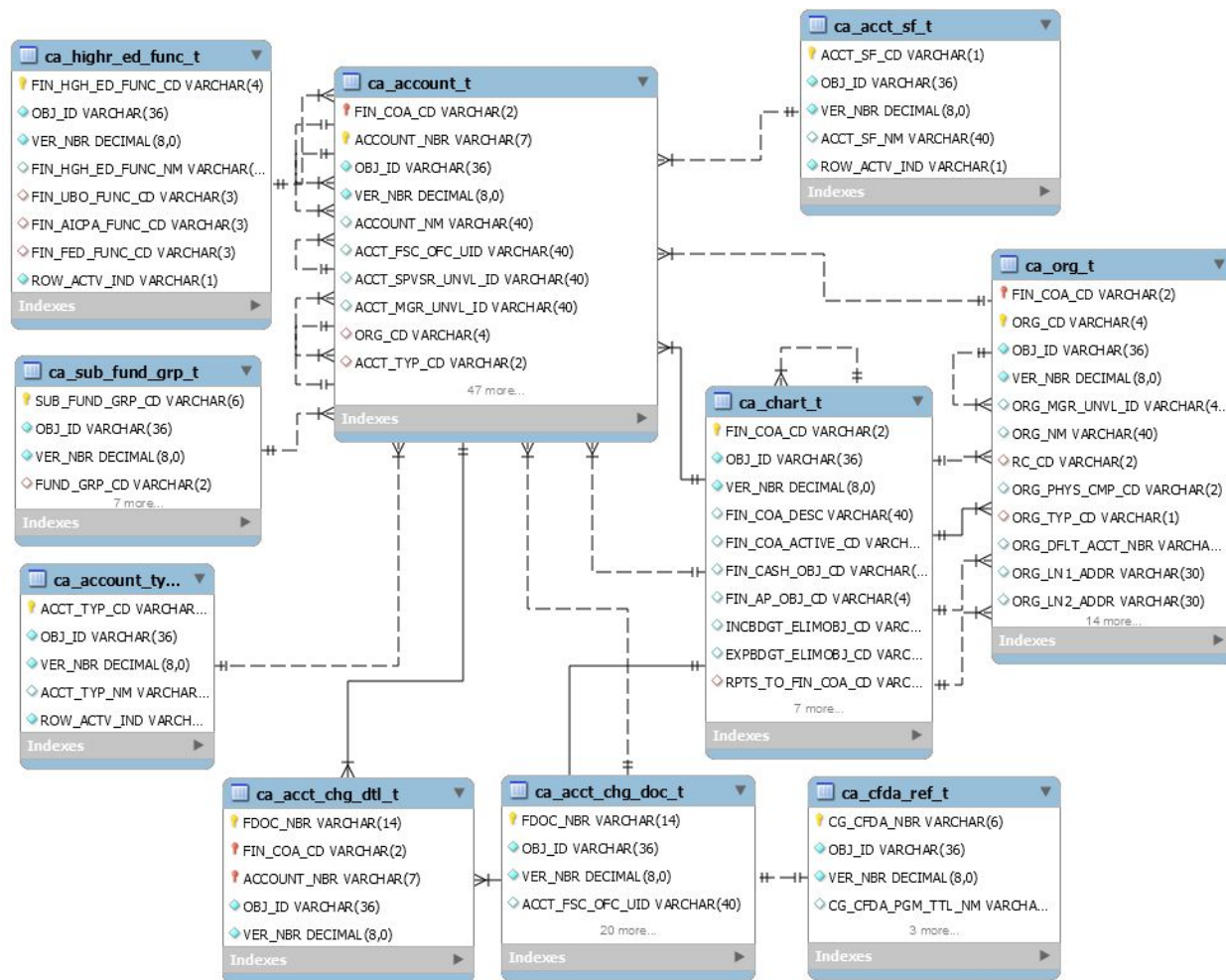
In the Account Global edit screen multiple attributes can be edited and assigned to multiple accounts. The final approval, however, routes through the Chart Manager and to the University Chart Manager. Object Code Global allows attributes such as code name, level code, sub-type code to be edited and assigned object codes across multiple charts and similarly Sub-Object Global allows an user to assign attributes to multiple sub-object codes. The Final Approval for Object Code Global and the Sub Object Code Global is University Chart Manager and Org Reviewer respectively.

The Account Delegate Global and the Account Delegate Global from Model allows to create delegates for multiple document types on one or more accounts either by creating Global from Scratch or by Model on a single document.

The Organization Reversion Global enables reversion records to be established for multiple organizations, only the OLE-SYS Chart Manager role can initiate the Organization Reversion Global document. The Org Reviewer is the final approver.

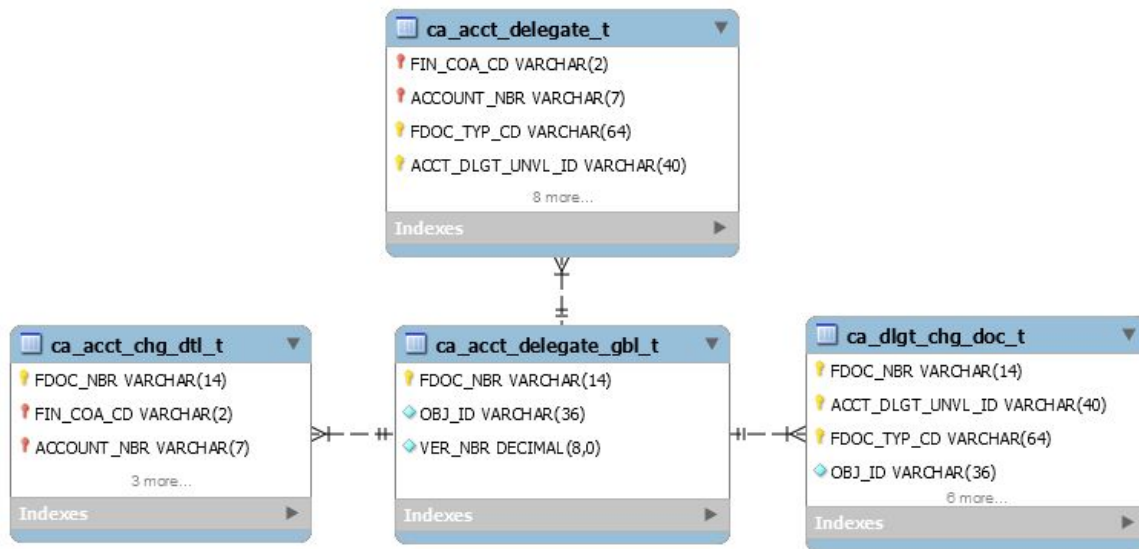
Physical Data Model (Database Schema)

Account Global



The **CA_ACCT_CHG_DOC_T** table is where all the account details that are edited through the global edit screen is maintained for the different accounts. The accounts belong to the **CA_ACCOUNT_T** table. The attributes are assigned for the various accounts under charts which reside in **CA_CHART_T**. The **CA_ACCT_CHG_DTL_T** table holds the document number and the chart code and account numbers that were to be edited through the global edit. The **fdoc_nbr** column in the **CA_ACCT_CHG_DTL_T** table holds the document number.

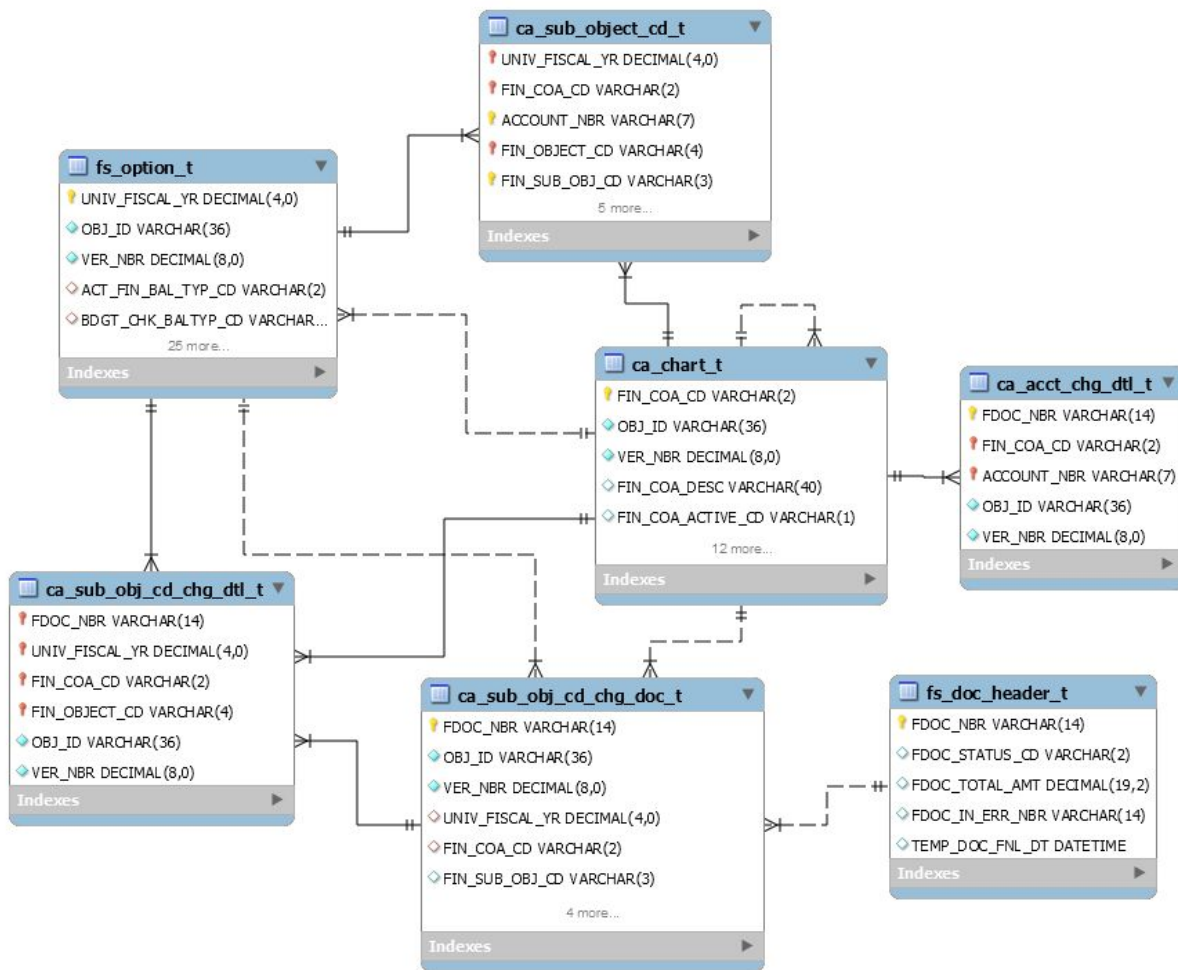
Account Delegate Global



The delegates for the various accounts are defined in the **CA_ACCT_DELEGATE_T** table. The account delegate global edit data is stored in the **CA_DLGT_CHG_DOC_T** table and the various account numbers for which the delegates are being edited is linked to is defined in the **CA_ACCT_CHG_DTL_T** table.

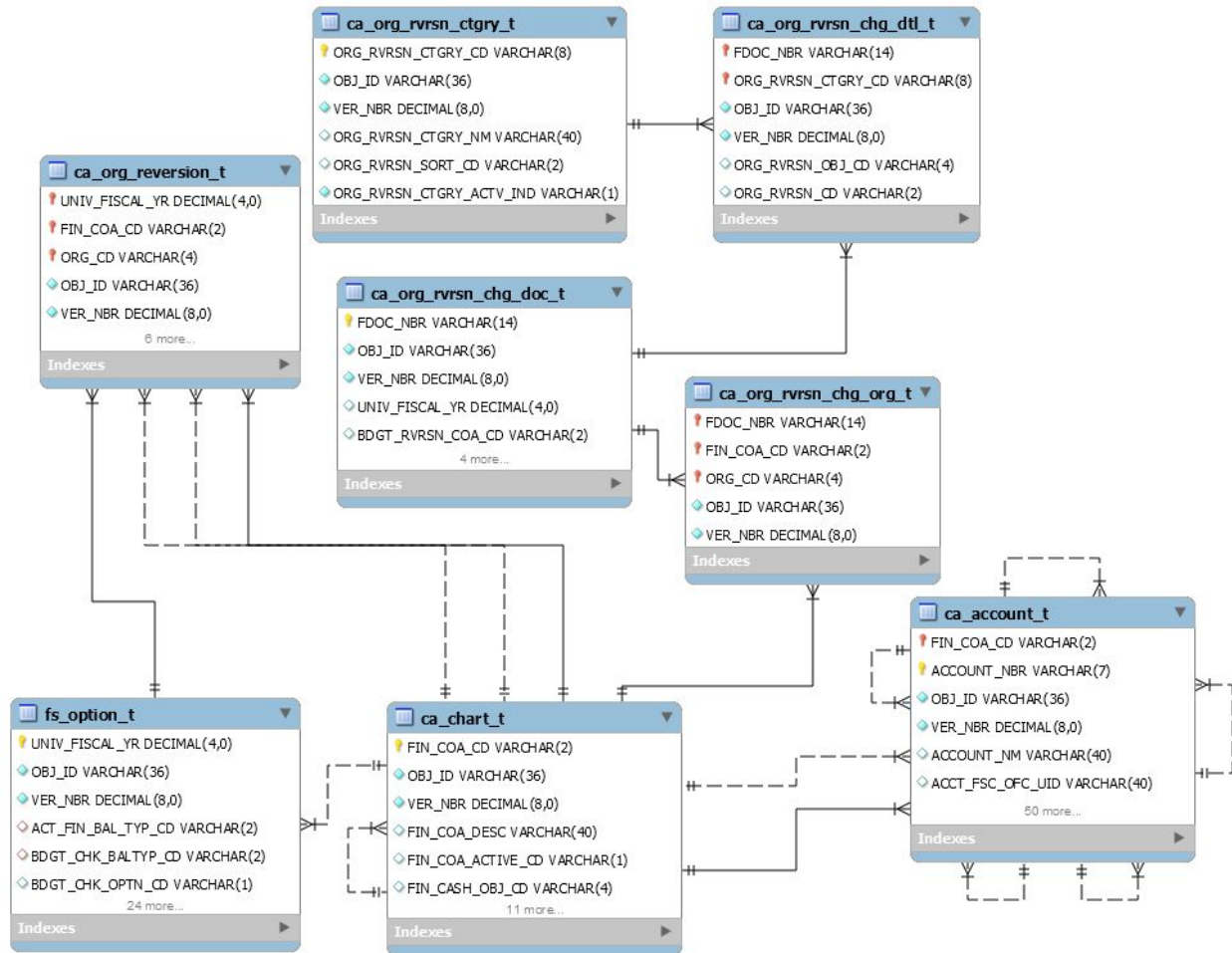
Object Code Global

The **CA_OBJ_CD_CHG_DOC_T** table is where the global edit attribute value for the various object codes are recorded. The various object codes existing in the system are defined under the **CA_OBJECT_CODE_T** table and is linked by the various object type (**CA_OBJ_TYPE_T**) and sub object type (**CA_OBJ_SUB_TYPE_T**). The Budget aggregation and the Federal funded codes are defined under the **CA_BDGT_AGGR_T** and **CA_FED_FND_T** tables respectively.



Organization Reversion Global

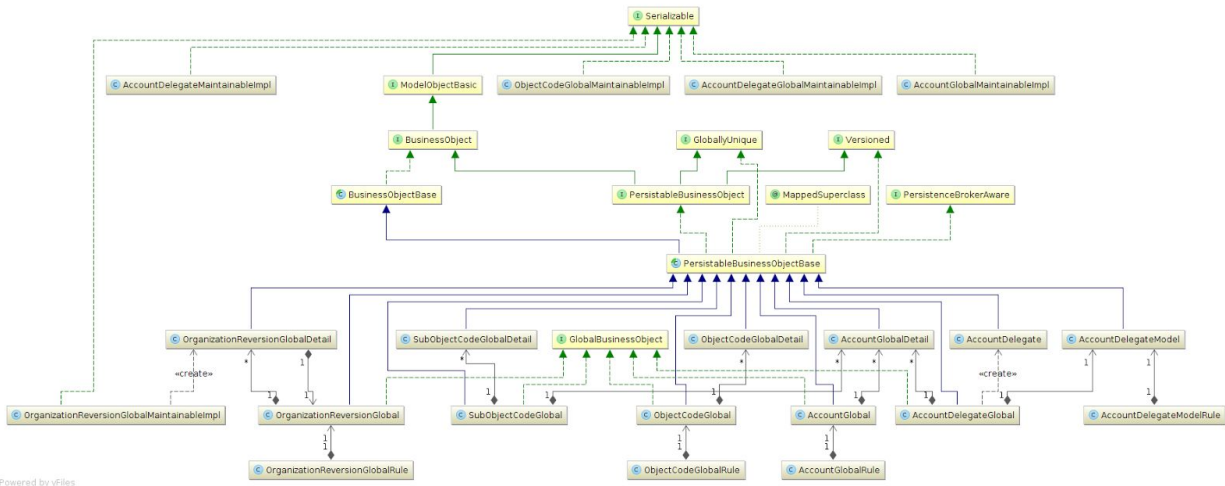
The *CA_ORG_RVRSN_CHG_DOC_T* table holds the attribute changes recorded through the global edit document. The *CA_ORG_RVRSN_CHG_DTL_T* table holds the organization codes and the corresponding reversion codes and object codes. The records are mapped to the Organization through the *CA_ORG_RVRSN_CHG_ORG_T* table. The changes are finally effected in the Reversion table, *CA_ORG_REVERSION_T*.



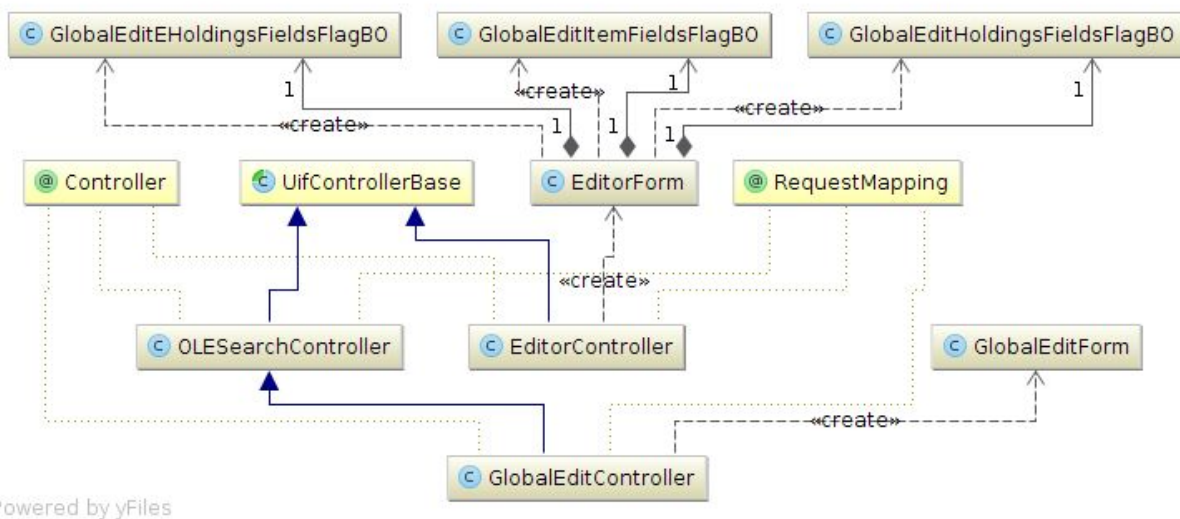
Service Interface Design (Java)

Each of the global edit document is represented as a business object class - OrganizationReversionGlobal, SubObjectCodeGlobal, ObjectCodeGlobal, AccountGlobal and AccountDelegateGlobal. These classes implement the GlobalBusinessObject Interface instead of the BusinessObject Interface.

The implementation is carried out in the rule classes. The OrganizationReversionRule class extends the MaintenanceDocumentRuleBase and implements the business rules specific to the Organization Reversion document. Methods such as validateDetailBusinessObjects, validateOrganizationReversionDetail, validateOrganizationReversionCode helps in validating the data submitted. Similarly ObjectCodeGlobalRule implements the business rules specific to the Object code. The AccountGlobalRule class implements the business rules for the account maintenance document. Methods in this class such as the checkEmptyValues, checkGeneralRules, checkExpirationDate and checkAccountDetails validates the input values.



A global edit document is available to edit holdings, ehholdings and items under bib records in OLE. It allows to edit attributes relevant to the holding data such as location, call number and add notes and item data such as item type, status, call numbers, location, etc.



The GlobalEditController class has methods to facilitate various functions. The search method helps in searching through the resources' item and holding information. The load method loads the records that are being selected for edit. The addGlobalEditRecords method helps in adding more records to be edited through the global edit screen. The globalEdit method lets the user to edit attributes across records in their item, holding or ehholding information.

Maintenance Documents are primarily used for creating and maintaining data elements. The *AccountGlobalMaintenanceDocument.xml* is used for maintaining the account and the *AccountDelegateGlobalMaintenanceDocument.xml* is used for maintaining the Account Delegate attributes. The *ObjectCodeGlobalMaintenanceDocument.xml* is for maintaining the Global object codes, year end charts. Similarly the *SubObjectCodeGlobalMaintenanceDocument.xml* is used for maintaining the edits for the Sub object codes and their respective object codes along with the accounts. The

OrganizationReversionGlobalMaintenanceDocument.xml is used for maintaining the data elements used for editing the Reversion details for the different organizations.

Service Interface Design (SOAP)

Not Available

User Interface Design

The Global Edits document uses KRAD's UIF (User Interface Framework). A very good guide on this can be found [here](#). The Spring Beans XML used in the case of Global Edits is under the data dictionary folder. *AccountGlobal.xml*, *AccountDelegateGlobal.xml*, *ObjectCodeGlobal.xml*, *SubObjectCodeGlobal.xml*, *OrganizationReversionGlobal.xml* are used in case of Account, Account Delegate, Object Code, Sub Object Code and Organization Reversion, respectively.

Data Importing

Not Applicable

Data Exporting

OLE uses a RDBMS backend and hence any data can be exported using simple SQL queries. Currently there is no direct way in which Patrons can be exported directly from OLE.

Workflow

Workflow details relevant to the global edit documents are found in the *ChartMaintenanceDocuments.xml* file under the workflows folder.

System Parameters

Not Applicable

Roles, Permissions and Responsibilities

Permissions and Responsibilities are linked to roles which are in turn linked to Users to give them access to screens and functions.

Permission ID	Permission Name
OLE10316	Global Edit of Holdings/Items/EHoldings

OLE55	Initiate Document GOBJ
OLE56	Initiate Document ORGR

Role Id	Role Name	Permissions
OLE37	Chart Manager	OLE380, OLE55, OLE56, OLE61, OLE62, OLE63, OLE64
OLE53	University Chart Manager	OLE26
OLE10085	Cataloger	OLE10316, OLE10317