

## Specification for Deaccession Records

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### DEacc--1: Scope / Purpose

The deaccession record is for indicating a repository has removed an accession or resource, or part thereof, from its collection (having either returned it to the original source, given it to another custodian, or discarded it outright).

Deaccessioning a complete accession or resource does not entail deleting the record for it. Rather, the record for an accession or resource that has been completely deaccessioned will be retained in the application database, but the record will be excluded from all application processes such as editing, searching, reporting, and viewing EXCEPT for processes designed specifically for managing deaccessions. Those processes include:

- Listing all records for accessions and / or resources that have been deaccessioned, including those for which the records are suppressed
- Viewing a single record for an accession or resource that has been completely deaccessioned
- Reactivating a record for an accession or resource that has been completely deaccessioned by deleting the deaccession record for the entire accession or resource

Generating a report for all accessions and / or resources that have been deaccessioned, including those completely deaccessioned and having their accession or resource records suppressed

### DEacc--2: Record / template description

The deaccession record will include the following fields:

- DeaccessionScope (required field with allowed values of 'Whole' or 'Part')
- Date (required; linked date object)
- Description (required)
- Extent (linked extent object)
- Reason
- Disposition

- Notification

System Control Data (generated by application and not editable by operator)

- Record Created Timestamp
- Last Modified Timestamp
- Record Created Staff Name
- Last Modified Staff Name

The deaccession record will also include controls for:

- Saving a deaccession record
- Creating another deaccession record
- Canceling a deaccession record or new modifications to existing deaccession record
- Navigation controls for going to the first, previous, next, and last deaccession record within a given context record and relative to an open deaccession record.

### **DEacc--3: Displaying deaccession statements**

All deaccession statements are to be displayed in a pane within an accession or resource record, the only two context records in which a deaccession record can be created.

The default display will consist of two columns which are, left to right, "Deaccession date" and "Deaccession extent."

The list of deaccessions will be sortable by either column. And the contexts of panes are to be scrollable for cases when the number of deaccessions exceeds the number of rows accommodated in the pane.

The Deaccession pane will also include two command buttons: "Add Deaccession" and "Delete Deaccession"

### **DEacc--4: Creating deaccession statements**

Deaccession records can only be created and edited from within the context of an accession or resource record. One or more deaccession records can be created within the context of any one accession or resource record.

To create a deaccession statement, the user will select the option “Add Deaccession” within an open accession or resource record. This will open the deaccession sub-record. The user must then indicate:

- The deaccession is for a part or the whole of the accession or resource
- The date of the deaccession event
- A description of what was deaccessioned

The user may also indicate the

- Extent of the deaccession
- Reason for the deaccession
- The disposition of the deaccession
- That the source of accession or resource has been notified about the deaccession

#### DEacc--5: Linked records

In addition to being linked to an accession or resource record, a deaccession record must link to one and only one date statement record, and it may link to zero, 1, or more extent statement records.

Since only one date statement can be expressed for a deaccession and since it must be of the type “deaccession”, then it can be included inline as part of the deaccession record, i.e., it should not be necessary to utilize the date statement pane that is described in the date specification.

**Comment [b1]:** Needs to be added to date statement specification as a type.

In contrast, since more than one extent statement can be expressed for a deaccession, the deaccession record should include an extent statement pane, as described in the extent specification.

## DEacc--6: Browsing, editing, and deleting deaccession statements

The operator will have the ability to view, list, and manage all deaccession records recorded in the database, that is, deaccession records for portions of and for complete accessions or resources. The list serves as the primary means for reviewing deaccession records as a collection of records and for populating the reports described in the last section of this specification.

The default list shall contain the following columns:

Deaccession Date

Deaccession Scope (Part / Whole)

Accession Identifier (from context accession record)

Resource Identifier (from context resource record)

Title (from context accession or resource record; blank if no title is provided in context accession record).

Each column shall be sortable, thereby allowing users to group deaccession records by date, type of deaccession, and by linked context record (accessions vs. resources).

The operator shall be able to open any context record and:

- Open and edit any of the deaccession records linked to the context record
- Delete any of the deaccession records linked to the context record
- Add an additional deaccession record to the context record (although this is an unlikely pathway for this task)

Note: For any given deaccession record, there will be either an accession identifier or resource identifier, but not both.

Closing the context record once the updating of the deaccession record(s) is completed will return the operator to the list of deaccession records.

To delete a deaccession record, the operator will highlight one or more deaccession statement(s) in the deaccession browsing pane and then click on the option "Remove Deaccession." The user will be requested to confirm the intention to delete deaccession records. If confirmation is given, the selected deaccession statement(s) will be removed from the deaccession pane and the deaccession record(s) will be deleted from the database.

#### DEacc--7: Business rules

1. Deaccessioning is the event when a repository removes an accession or resource, or part thereof, from its collection (returning the deaccessioned material to its source, transferring it to another custodian, or discarding it).
2. Deaccessioning occurs either before an accession is processed, in which case, the deaccession record is linked to the accession record, or after an accession is processed, in which case the deaccession record is linked to the resource record.
3. A valid deaccession record requires the following data elements:
  - a. DeaccessionScope (Whole/Part)
  - b. Date
  - c. Description
4. A valid deaccession record may also indicate the reason, extent, and disposition of the deaccession, and whether interested parties have been notified.
5. Any one deaccession record may be linked to one and only one accession or resource record.
6. Deaccession records linked to an accession record are not transferred to resource records spawned from the accession record
7. One or more deaccession records may be added to an accession or resource record to track multiple deaccession events.

#### DEacc--8: Required task sequence

1. Select the option to Add a deaccession record to an accession or resource record
2. Indicate if the deaccession record is for part of or the entire accession or resource
3. Indicate the date of the deaccession event
4. Describe the materials deaccessioned
5. Save and close the deaccession record

**DEacc--9: Optional task sequence**

1. Indicate the reason for the deaccession
2. Describe the extent(s) of the deaccession
3. Indicate the disposition of the deaccessioned material
4. Indicate if the source of accession or resource has been notified about the deaccession

**DEacc--10: User intentions / Application response sequence**

<b>User intention (Required fields in <i>italics</i>)</b>	<b>Application response / action</b>
<i>Within an open accession or resource record, select the option to <b>create</b> a deaccession statement</i>	
	Application opens the deaccession statement record, with all assigned default values present
<i>Indicate if the deaccession statement is for part of the accession or resource, or for the whole of it</i>	
<i>Record the date the deaccession took place</i>	
<i>Describe the materials deaccessioned</i>	
Record optional information re: the deaccession: reason, extent, disposition, and notification	
<i>Save the deaccession statement</i>	
	If the deaccession statement is not valid, the application will indicate the deaccession statement cannot be saved, and it will indicate what needs to be fixed

	in the record to make it valid
	<p>Or, if the deaccession statement is valid and is for the whole of the accession or resource, the application will respond:</p> <p><b>You have indicated the entire accession / resource has been deleted. If you continue, the accession / resource record will be suppressed.</b></p> <p><b>Do you want to continue? Yes or No</b></p>
Selects the No option	
	Application reverts to state before deaccession statement was created
Selects the Yes option	
	<p>Application will indicate record has been saved, and, on closing the deaccession record template, the deaccession statement will appear in the deaccession statement pane of the context accession or resource record.</p> <p>If the deaccession record is for the whole of the accession or resource record, on closing the context accession or resource record, the context accession or resource record will be omitted from the updated list of accession or resource records, indicating that is the record is now suppressed.</p>
	Else, if the deaccession statement is valid and is for a part of the accession or resource, the application will indicate deaccession record has been saved and, on closing the deaccession record template, the deaccession statement will appear in the deaccession statement pane

	of the context access or resource record.
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<b>User intention (Required fields in italics)</b>	<b>Application response / action</b>
<i>Within an open context accession or resource record, select from within the deaccession statement pane an existing deaccession statement to <b>edit</b></i>	
	Application displays the selected deaccession statement record
<i>Edit one or more fields in the open deaccession statement record</i>	
<i>Save the edited deaccession record</i>	
	If the edited deaccession statement record is no longer valid, application will indicate date record cannot be saved, and it will indicate what needs to be fixed for record to be saved
	Or, if the edited deaccession statement record is valid, the application will indicate the deaccession record has been updated and, on closing the deaccession record, the updated deaccession statement will appear in the deaccession statement pane of the context record

<b>User intention (Required fields in italics)</b>	<b>Application response / action</b>
<i>Within an open context record, select one or more existing deaccession statements in the deaccession statement pane to <b>delete</b></i>	

<i>Select the option to delete the deaccession statement(s)</i>	
	If all deaccession statements selected for deletion are for part of accessions / resources, then the application responds "Are you sure you want to delete "N" deaccession record(s). Yes or No
	<p>If one deaccession statement selected for deletions is for the whole of an accession or resource, then the application responds:</p> <p><b>You have selected "N" deaccession statements for deletion.</b></p> <p><b>One deaccession statement is for the whole accession / resource. Deleting it will restore the accession / resource to active status.</b></p> <p><b>Select Yes to proceed with the deletion process, or No to cancel</b></p>
<i>Select the "No" option</i>	
	Application reverts to the state before selecting delete option
<i>Select the "Yes" option</i>	
	Application indicates "N" records have been deleted
	Application waits two seconds, holding display of message above
	Application then refreshes display, updating list of deaccession statements in deaccession statement pane

<b>User intention (Required fields in <i>italics</i>)</b>	<b>Application response / action</b>
<i>After adding, editing, or deleting one or more deaccession statements to a context accession or resource record, choose to <b>save</b> the open context accession or resource record</i>	
	Application will indicate the open accession or resource context record is updated
	If a deaccession statement for the whole of an accession or resource has been deleted, then the record for the accession or resource will be restored to active status and will re-appear in the current list of accessions or resources.
	Conversely if a deaccession statement for the whole of an accession or resource has been added (either adding a new record or by modifying an existing deaccession record), then the record for the accession or resource will be suppressed from the list of accession or resource records in the system.

## DEacc--11: Date data elements

Element	Definition	Type	Default Values	Required
deaccessionWholePart	Indicates if the deaccession record pertains to a complete accession or resource or a part thereof  Note: records for accessions and resources that are completely deaccessioned (i.e. when this field is set to whole) are to be retained in the system but excluded from all application processes (editing, searching, viewing, etc.) except deaccession reports.	Boolean; 0 corresponds to part, 1 corresponds to whole	0 (Part)	Yes
deaccessionDate (linked sub-record)	Indicates the date the deaccession even occurred	Date		Yes
deaccessionDescription	A description of the materials deaccessioned	Text		Yes
deaccessionReason	The reason for deaccessioning the materials described	Text		No
deaccessionExtent (linked sub-record)				No
deaccessionDisposition	An indication of what was done with the deaccessioned material	Text		No
deaccessionNotification	Indication that notification of the deaccession was given	Boolean	False	No
accessionRecordCreatedTim		timestamp	Automatically generated	Yes

estamp			when record is created	
accessionLastModifiedTimestamp		timestamp	Automatically updated when record is saved.	Yes
accessionRecordCreatedStaff		Text < 256	Automatically insert lookup of staff name from user tables	Yes
AccessionLastModifiedStaff		Text < 256	Automatically insert lookup of staff name from user tables	Yes

#### DEacc--12: Imports

None supported.

#### DEacc--13: Exports

None supported

#### DEacc--14: Reports

There will be one deaccession report provided and it will be for a list of accessions and resources with linked deaccession records.

The content of the report will be determined by the content of the deaccession browse list as configured by the operator. Thus, the report can be constrained to:

- Accessions or resources
- Part or whole deaccessions
- Date range

Each entry in the report will consist of a brief description of the accession or resource (identifier, title, dates, extents, container summary) and a list of the deaccession records (whole / part, date, description, extent, notification)