

Specification for Expressing Extent Statements

Ex1: Scope / Purpose

The sub-record is designed to enable archival repositories to record multiple physical description statements for accession, resource, and resource component records.

Ex2: Record / template description

The extent record will contain the following fields

- Extent portion (REQUIRED)
- Extent number (REQUIRED)
- Extent type (REQUIRED)
- Container summary
- Other physical details
- Dimensions

It will also include 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 application will also include controls for:

- Saving an extent record
- Editing an existing extent record
- Adding a new extent record
- Deleting one or more extent records

(Save operations may be executed as part of the operation to save the parent resource, resource component, or accession record, or as part of an operation to save the extent record separately from the rest of the information in the parent resource, resource

component, or accession record. The approach chosen by the technical team and designer should be in keeping with the overall interface design philosophy.)

Ex3: Displaying extent statements

All extent statements for a given accession, resource, or resource component record are displayed within the record to which they are linked, preferably on the first tab of the record if it is a multi-tab record. The display for the extent statement will consist of two columns: in column 1 will be a concatenated expression of the extent number and extent type and in column 2 will be a corresponding container list. For example

- 14 linear feet 10 record cartons, 8 archives boxes
- 4 video tapes
- 20 drawings

Note: while every extent statement must include extent number plus extent type, not every extent statement will include a container summary value and in those situations no data will be displayed in container list column.

The first item or row in the list of extent statements should always be the extent statement for the total accession or resource. Subsequent items or rows in the list should be for extent statements that represent a portion of the accession or resource. It may be best to sort portion extent statements alphabetically by extent type.

The list of extent statements will be accompanied by controls for creating and deleting extent statements.

Ex4: Creating / deleting extent statements

Extent statements are created from within the accession, resource, or resource component record to which the statement applies. A user must create one extent statement for each resource record but may create supplemental extent statements for the same resource record. Also, a user may create 1 or more extent statements for any one accession or resource component record. In other words, one statement for the total extent is required for every valid resource record, whereas extent statements are optional for accession and resource component records. For accession records, there can be 0 or 1 extent statements for the total accession and 0 or more extent statements for parts of the accession. For resource components, all extent statements must refer to a portion of the resource (i.e., no extent statement representing a total extent for the parent resource is permissible at the resource component level).

To create an extent statement, the user will select the add extent option from within a given accession, resource, resource component record context. The user must then indicate if the extent is for the whole or a part of the accession or resource (extent statements for resource components are always for a portion of the resource.) The user must also indicate the extent number and extent type, e.g., “18” + “linear feet” or “4” + “volumes”. The user may provide additional information in the form of a container summary for the extent statement, other physical details about the materials, and dimensions of the materials.

To delete an extent statement, the user will highlight one or more of the extent statements in the open accession, resource, or resource component record and then select the remove extent option. The user will then be requested to confirm the operation. When that confirmation is given, the selected extent statements will be removed from the list of extent statements in the extent pane in the open record.

Ex5: Business rules

1. An extent statement may be recorded by all staff users who have authority to edit the accession, resource, or resource component record to which it belongs.
2. A valid extent statement record requires the following data values:
 - Extent portion
 - Extent number
 - Extent type
3. A valid extent statement record may also include values for container summary, other physical details, and dimensions.
4. An extent statement record may be linked to only one accession, resource, or resource component record.
5. An extent statement record must be linked to a resource record and it must refer to the total extent for the resource
6. Additional extent statements may be linked to a resource record and they must refer to portions of the resource
7. Extent statements may be linked to resource component records, but are not required. Extent statements linked to resource component records can only refer to portions of the resource.

8. Extent statements may be linked to accession records, but are not required. Only one extent statement may refer to the whole accession. All additional extent statements must refer to portions of the accession.

Ex6: Required task sequence

1. Select the option to record an extent statement
2. Indicate if the extent statement is for the total accession or resource record, or for a portion of the accession, resource, or resource component record. Extent statements can only be for a portion of any resource component record.
3. Enter the number part of the extent statement
4. Enter the type part of the extent statement (e.g., linear feet, volumes, posters)
5. Save the extent statement

Ex7: Optional task sequence

1. Record a container summary for the extent statement
2. Record other pertinent physical details
3. Record dimensions for the materials

4.

Ex8: User intentions / Application response sequence

User intention (Required fields in <i>italics</i>)	Application response / action
<i>Within an open accession, resource, or resource component record, select option to add an extent statement</i>	
	Application opens the extent statement record template, with all assigned default values present
<i>Record if extent statement is for total or portion</i>	
	If an extent statement for the total accession or resource is already present, only the option to enter an additional extent statement for a portion will be available
<i>Record number part of extent statement</i>	
<i>Record type part of extent statement</i>	
Record optional information for container summary, physical details, and / or dimensions	
<i>Save the extent statement record when all data desired has been recorded</i>	
	If the extent statement record is not valid, application will indicate extent record cannot be saved and will indicate what needs to be fixed for record to be saved
	Or, if extent statement record is valid, application will indicate record has been saved, and extent statement will appear in the extent pane for the associated

	accession, resource, or resource component record
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User intention (Required fields in <i>italics</i>)	Application response / action
<i>Within an open accession, resource, or resource component, select an extent statement to edit</i>	
	Application displays the extent statement record template populated with the values of the selected record
Edit one or more fields in the open extent record	
<i>Save the edited extent record</i>	
	If the edited extent statement record is no longer valid, application will indicate extent record cannot be saved and identify what needs to be fixed for record to be saved
	Or, if the edited extent statement record is valid, application will indicate record has been saved, and extent statement will appear in the extent pane for the associated accession, resource, or resource component record

User intention (Required fields in <i>italics</i>)	Application response / action
<i>Within an open accession, resource, or resource component record, select one or more extent statements to delete</i>	
Select the delete extent statement(s) option	

	Application responds: "Are you sure you want to delete "N" extent record(s)?" Yes or No
Select the No option	
	Application reverts to state before selecting delete option
Select the Yes option	
	Application indicates N records have been deleted, message is displayed briefly then automatically clears.
	Application refreshes list of extent statements in extent pane of open accession, resource, or resource component record

User intention (Required fields in <i>italics</i>)	Application response / action
<i>After adding one or more extent statements to an open accession, resource, or resource component record, choose to save the open accession, resource, or resource component record</i>	
	<p>Application will indicate the open accession or resource record is updated if:</p> <ul style="list-style-type: none"> • no extent statements are linked, or • one or more extent statements are linked and only one extent statement is for the total accession or resource and the rest of the extent statements are for portions of the accession or resource

	<p>Application will indicate the open resource component is updated if</p> <ul style="list-style-type: none"> • no extent statements are linked, or • one or more extent statement are linked and all of the extent statements are for portions of the resource
	<p>Otherwise, application will indicate open accession, resource, or resource component record is invalid and cannot be updated if</p> <ul style="list-style-type: none"> • one or more extent statements are linked to accession or resource record and either none or more than one is for the total accession or resource • at least one extent statement linked to resource component is for total resource extent, which can be programmed to be impossible

Ex9: Data elements table

Element	Definition	Type	Default Values	Required
extentPortion	A field for indicating if the extent statement applies to the entire accession or resource or to a portion of an accession or resource. When an extent statement is linked to a resource component, it can only be for a part of the resource. Thus, when linking an extent statement to a resource component, the operator should not have the option to declare it an extent statement for the total resource	Non-config lookup	Whole Part	Yes
extentNumber	A numeric value for indicating the number of units in the extent statement, e.g, 5, 11, 245	Decimal (9,2)		Yes
extentType	The type of unit expressed by the numeric quantity.	Config lookup	<ul style="list-style-type: none"> • Cassettes • Cubic feet • Leafs 	Yes

			<ul style="list-style-type: none"> • Linear feet • Photographic prints • Photographic slides • Reels • Sheets • Volumes 	
extentContainerSummary	Enumerated list of container and container types housing the resource materials	Text > 256		No
extentPhysicalDetail	Other physical detail of the material(s) described, e.g., analog, b&w, negative	Text > 256		No
extentDimensions	Dimensions of the material(s) described, e.g., 29 cm, 7 ¼ x 3 ½ in., ½ in. tape	Text > 256		No
accessionRecordCreatedTimestamp		timestamp	Automatically generated	Yes

			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

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Ex9: Imports

Accessions

Extent information in either XML or CSV formatted accession records will be imported to an extent record for the corresponding accession record.

EADs:

An EAD with valid Physical Description entry elements will import and populate the extent statement elements. <physdesc> elements without a nested <extent> element will be parsed to the appropriate note fields (<physfacet> to Physical Facet note, <dimensions> to Dimensions note).

Note: Users may choose later to migrate those notes, in whole or part, to appropriate fields in the extent statement record.

MARCXMLs

The MARCXML field 300 will import and populate the appropriate extent statement elements.

Note: MARC data is only imported to the resource record and not to any component records. Users may choose to relocate component extent information manually from the resource record to the appropriate resource component record.

Ex10: Exports

Data recorded in a single extent statement record will be output appropriately in exported EAD, MARCXML, DC, and MODS records from resource and resource component records. Data recorded in extent records linked to accession records are not exported, but are included in accession reports.

EAD:

Extent statements will be output into a single <physdesc> wrapper element corresponding to the level of the material(s) to which the extent statement is linked. **extentNumber** and **extentType** will be included in the first <extent> element. If there is text in the containerSummary, its contents will be exported in a second <extent> element. This will be followed by **physicalDetail** wrapped in a <physfacet> element, and dimensions in a <dimensions> element. This will appear as follows:

```
<physdesc>
  <extent>[extentNumber] [extentType]</extent>
  <extent>[containerSummary]</extent>
  <physfacet>[physicalDetail]</physfacet>
```

```
<dimensions>[dimensions]</dimensions>
</physdesc>
```

Each extent statement record will be exported as a separate <physdesc> element in the EAD.

MARC:

Extent statement records will be output in a single <datafield> wrapper element corresponding to the associated resource record. **extentNumber** and **extentType** will be included in the first <subfield> element. If there is text in the containerSummary, its contents will be exported in a second <subfield> element. This will be followed by **physicalDetail** and dimensions in separate <subfield> elements. This would appear as follows:

For the extent statement for the total resource:

```
<datafield tag="300" ind1=" " ind2=" ">
  <subfield code="a">[extentNumber] [extentType]</subfield>
  <subfield code="a">([containerSummary])</subfield>
  <subfield code="b">[physicalDetail]</subfield>
  <subfield code="c">[dimensions]</subfield>
</datafield>
```

For the extent statement for a portion of a resource:

```
<datafield tag="300" ind1=" " ind2=" ">
  <subfield code="3">[extentType]</subfield>
  <subfield code="a">[extentNumber]</subfield>
  <subfield code="a">([containerSummary])</subfield>
  <subfield code="b">[physicalDetail]</subfield>
  <subfield code="c">[dimensions]</subfield>
</datafield>
```

Ex11: Reports

Extent statements are parts of other records, for example, an accession or resource record. There will be no report(s) for extent information by itself.