COBISS

COBISS3/Reports – classifications

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Educational, Scientific and
Cultural Organization

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Regionalni center za knjižnične
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IZUM

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1 Introduction

A classification determines the manner in which data are classified in reports, especially in statistical tables. The classification defines categories, where the data from statistical tables are sorted.

Classifications definitions created by IZUM can be found in the COBISS3/Reports software module in the subfolder **Classifications / Standard**. If you want to change a selected classification, you copy its definition in the subfolder **Classifications / User definitions** and edit it. In the user defined classifications group you can also create a new classification.

The privilege *RPT_VAR – Maintenance of variables and classifications* is required for editing the classifications definitions.

The instructions describe the creation and editing of user defined classifications as well as the use of the classifications when creating statistical reports.

2 Creating classifications

There are two ways of creating a classification adapted to the needs of the library:

- copy the classification definition saved in the **Classifications / Standard** subfolder into the **Classifications / User definitions** folder and then change it according to your needs;
- create a new classification in the group of user classifications definitions.

2.1 Changing the system classification definition

The classifications in the **Classifications / System definitions** folder are created by IZUM and you cannot change them in this folder. If you want to adapt a specific classification to the needs of the library, you copy it into the **Classifications / User definitions** folder and edit it there:

1. Open the **Classifications / System definitions** folder in the **Groups of definitions** pane. Folders with names of the software modules will open. Select the folder with the software module name for which you want to copy the user definition. Some modules (e.g. Loan) the classifications definitions are distributed into individual subfolders to make them more comprehensible.

   In the right pane (**Definitions of selected group**) a list of system definitions for the selected module or the group of classifications in the module is displayed.

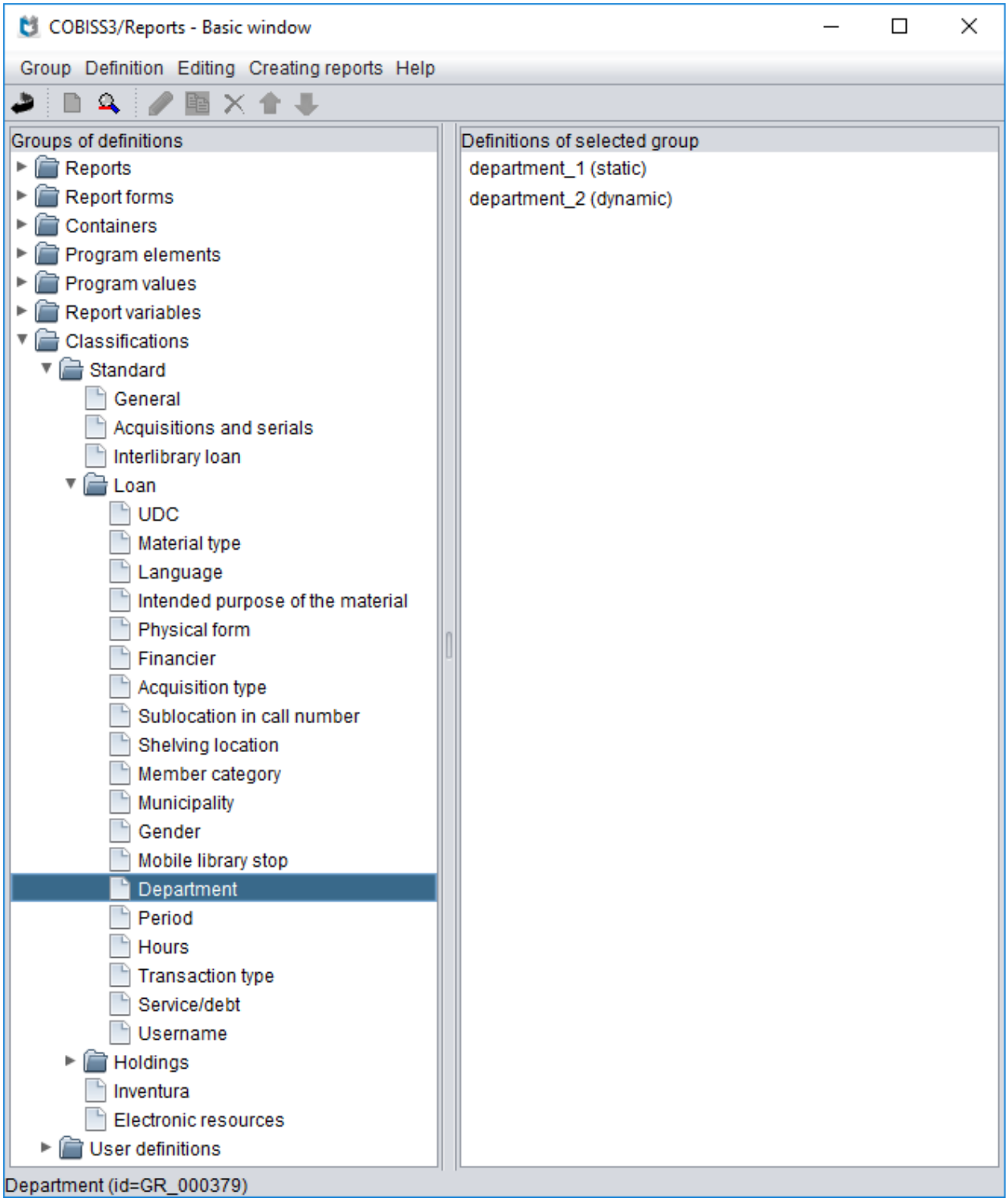

Figure 1: Selecting the classification definition

2. Highlight the classification definition you want to copy.
3. Select the **Edit / Copy and paste to user definitions** method (or right click and select the **Copy and paste to user definitions** method).

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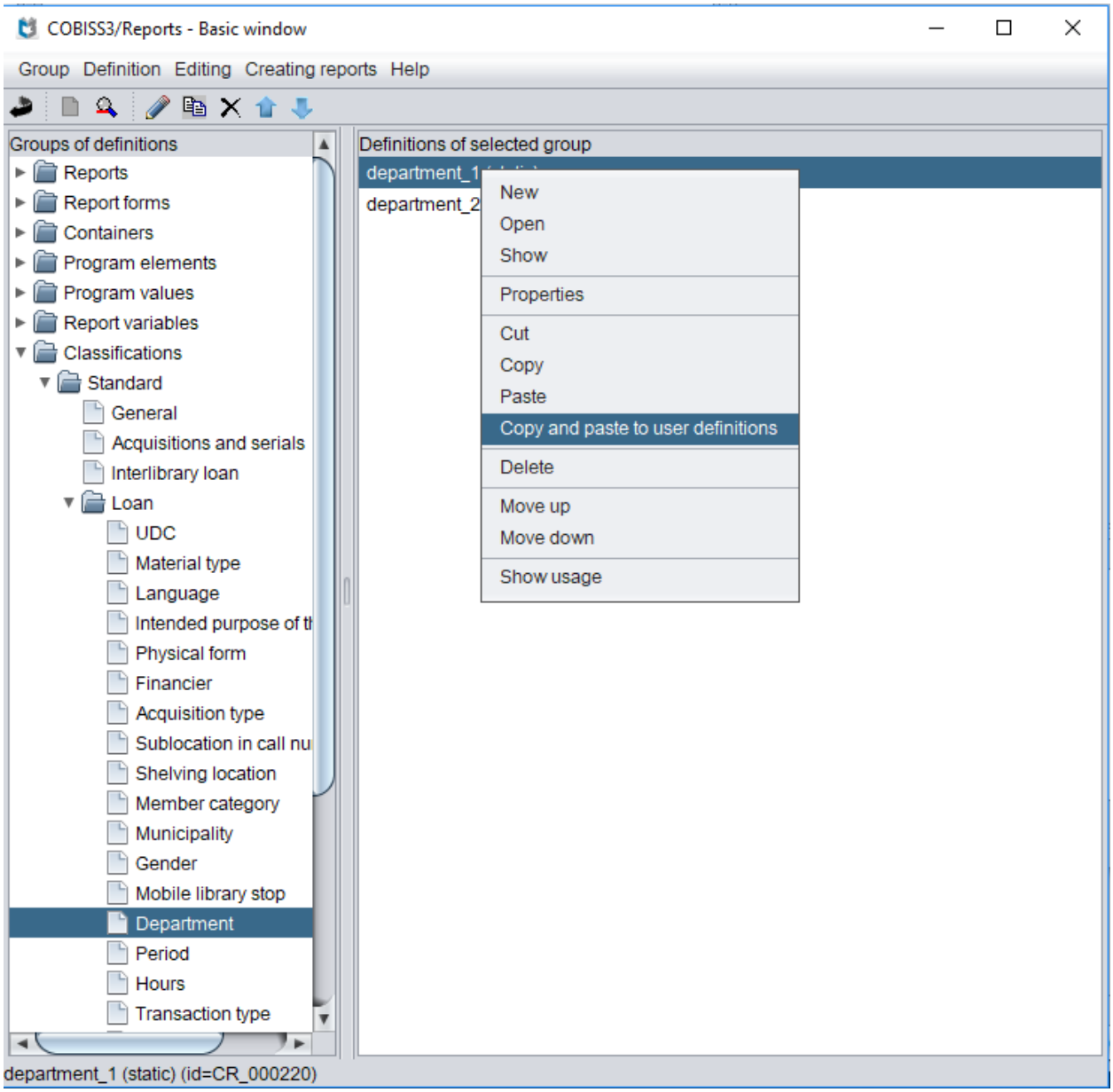

Figure 2: Copying the selected classification definition

The classification is copied to a group of user classification definitions. If a folder with the module name or the name of the group of classifications does not exist yet, it is created automatically.

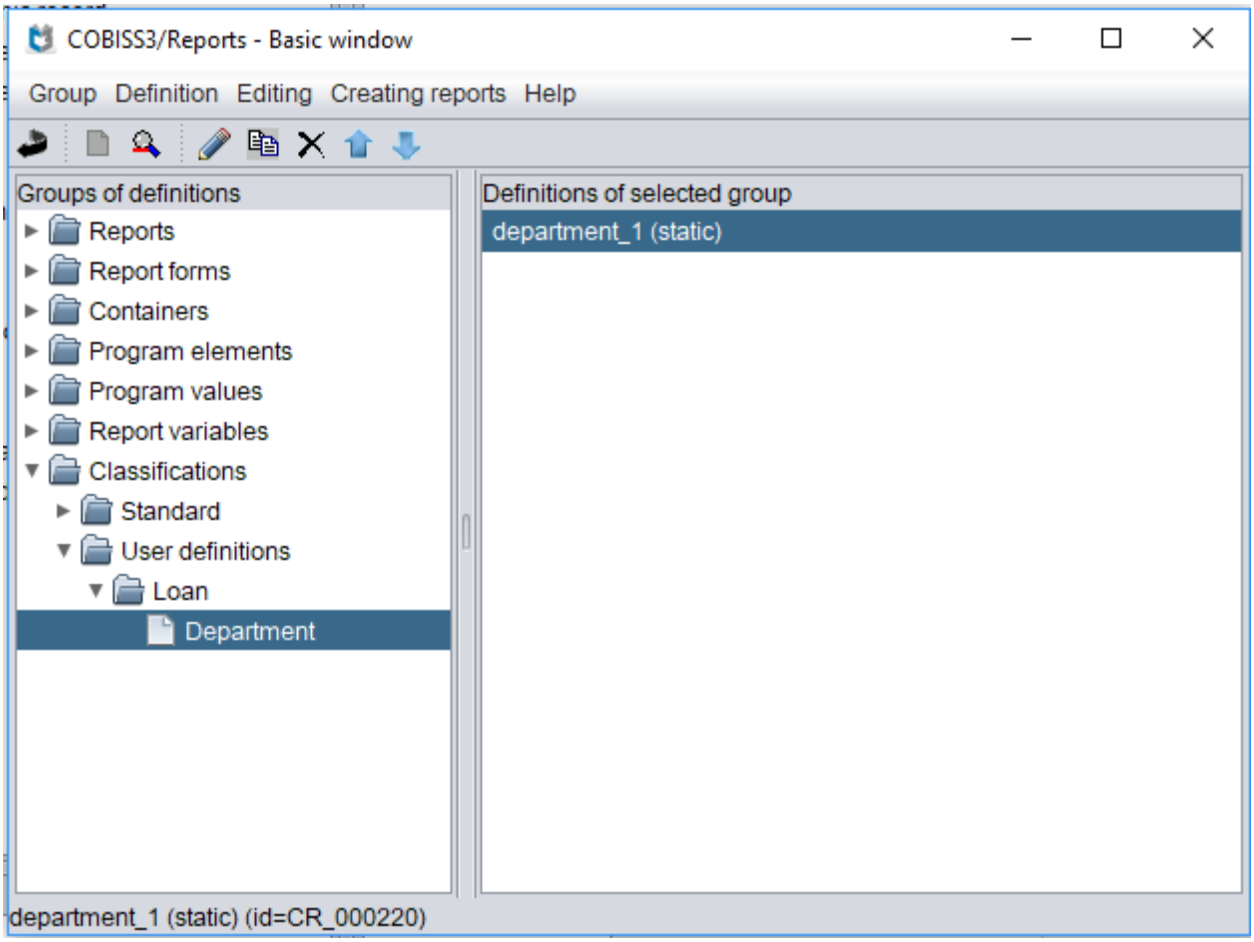

Figure 3: Pasting the copy of the classification to the user definitions

It is also possible to use the methods **Edit / Copy** and **Edit / Paste** to copy a system classification into the group of user definitions. In such a case, in the **Classifications / User definitions** folder, create subfolders where you will save the classifications depending on their content (e.g. classifications for the needs of loan into the **Loan** folder; as several classifications are possible, it makes sense to save them in subfolders, e.g. municipalities, mobile library stops, etc.).

4. Edit the properties of the classification definition (see chapter 2.3).
5. Edit the classification definition (see chapter 2.4).

Notes:

A system classification can only be copied into the group of user definitions once!

When creating the report the classification definition from the group of user definitions that you created with the copy method will be taken into account and not the classification definition from the group of system classifications definitions!

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2.2 Creating a new classification definition by duplicating the user defined classification

You can create one or more user classifications adapted to the needs of the library by duplicating the user classification:

1. Open the **Classifications / User definitions** folder in the **Groups of definitions** pane.
2. Highlight the classification definition you want to duplicate.

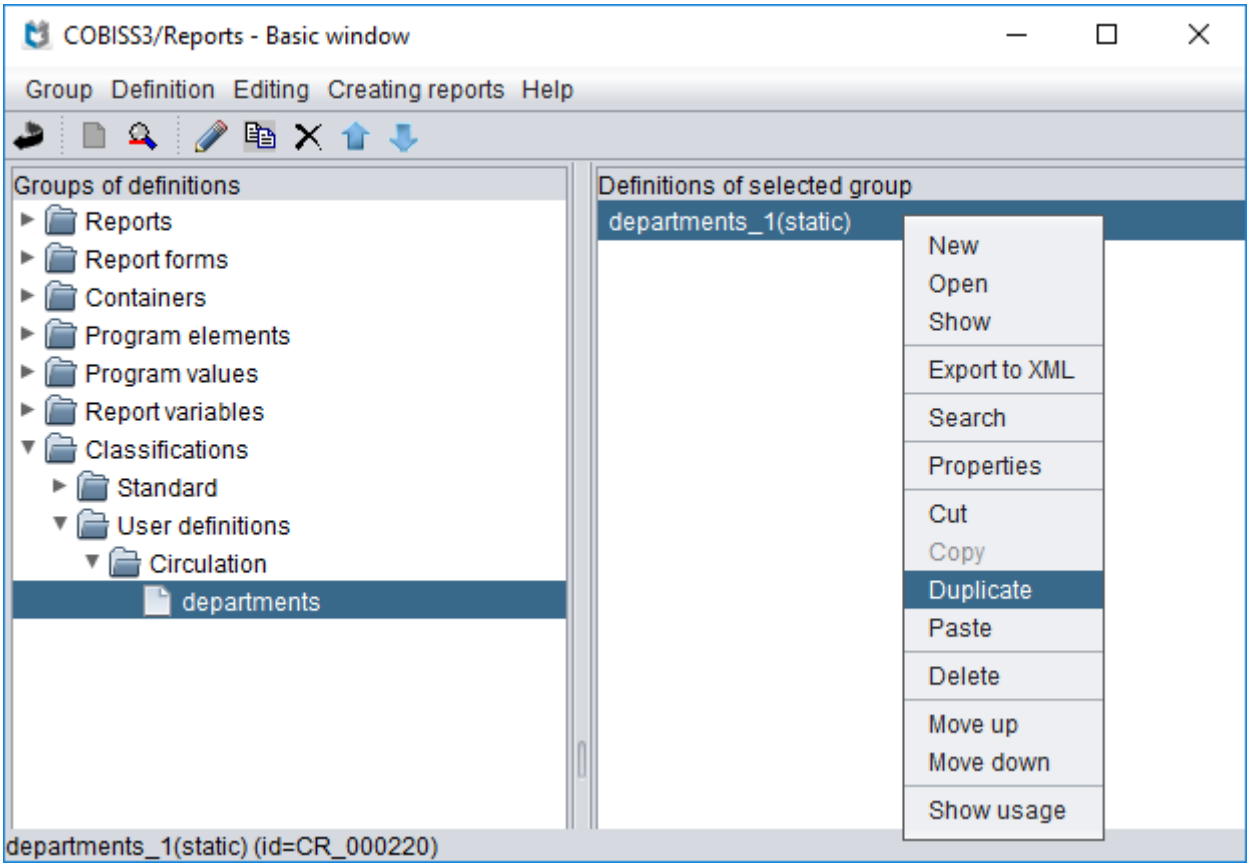

Figure 4: Duplicating a user defined classification

If the user classification does not yet exist, you need to first copy the system classification to the user classifications.

> **Note:**
>
> *If the system definition is appropriate for creating statistics, leave the copied user classification unchanged (and edit the changes in the duplicated user classification)!*

3. Right click the mouse and select the **Duplicate** method.

   The duplicated classification is created in the **Definition of the selected group** pane – the word *(duplicated)* in brackets is added to the classification name.

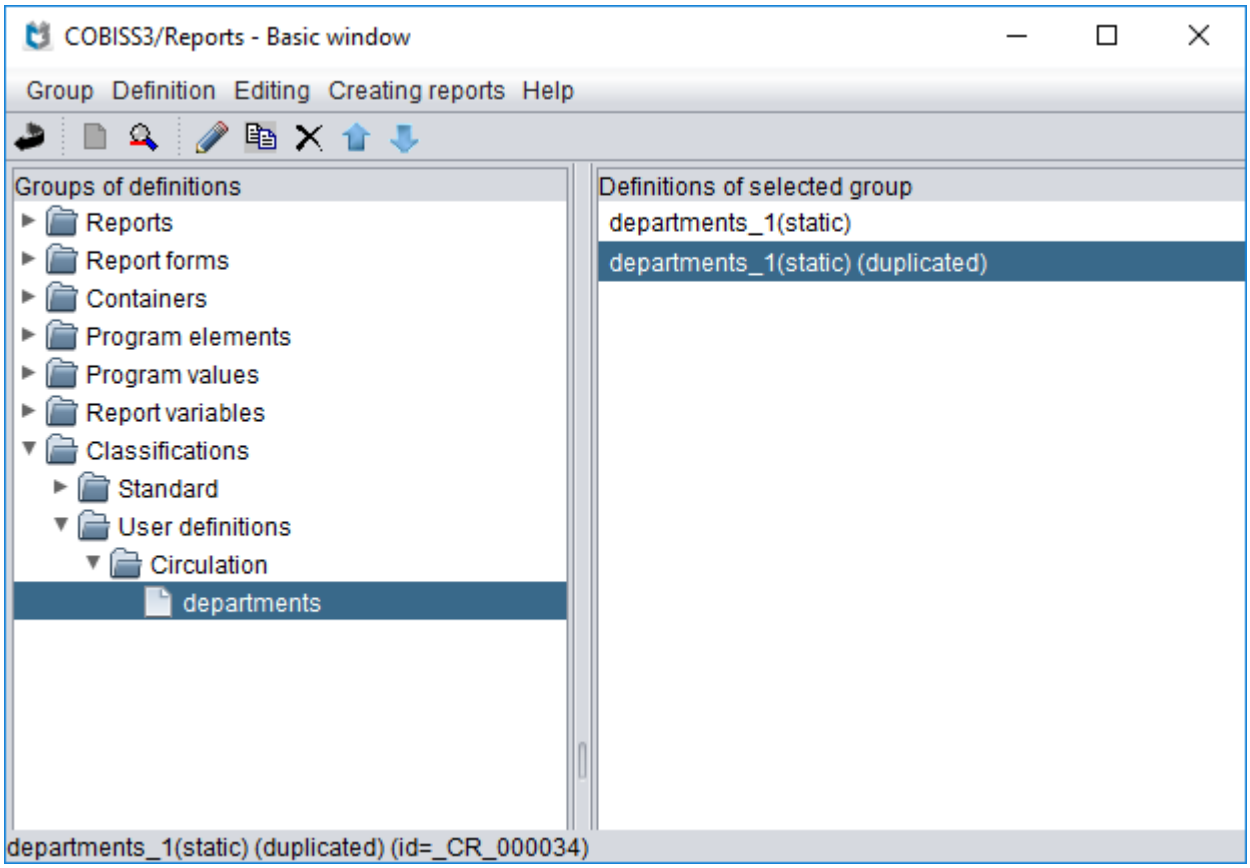

Figure 5: Duplicated user classification definition

4. Edit the properties of the classification definition (see chapter *2.3*).
5. Edit the classification definition (see chapter *2.4*).

2.3 Editing the properties of the classification definition

You can only change the properties of those classification definitions that are saved in the group of user definitions. You can do this with the following procedure:

1. Select the classification definition you would like to edit from the list of user classification definitions.
2. Select the **Definition / Properties** method (right click the mouse and select the **Properties** method).

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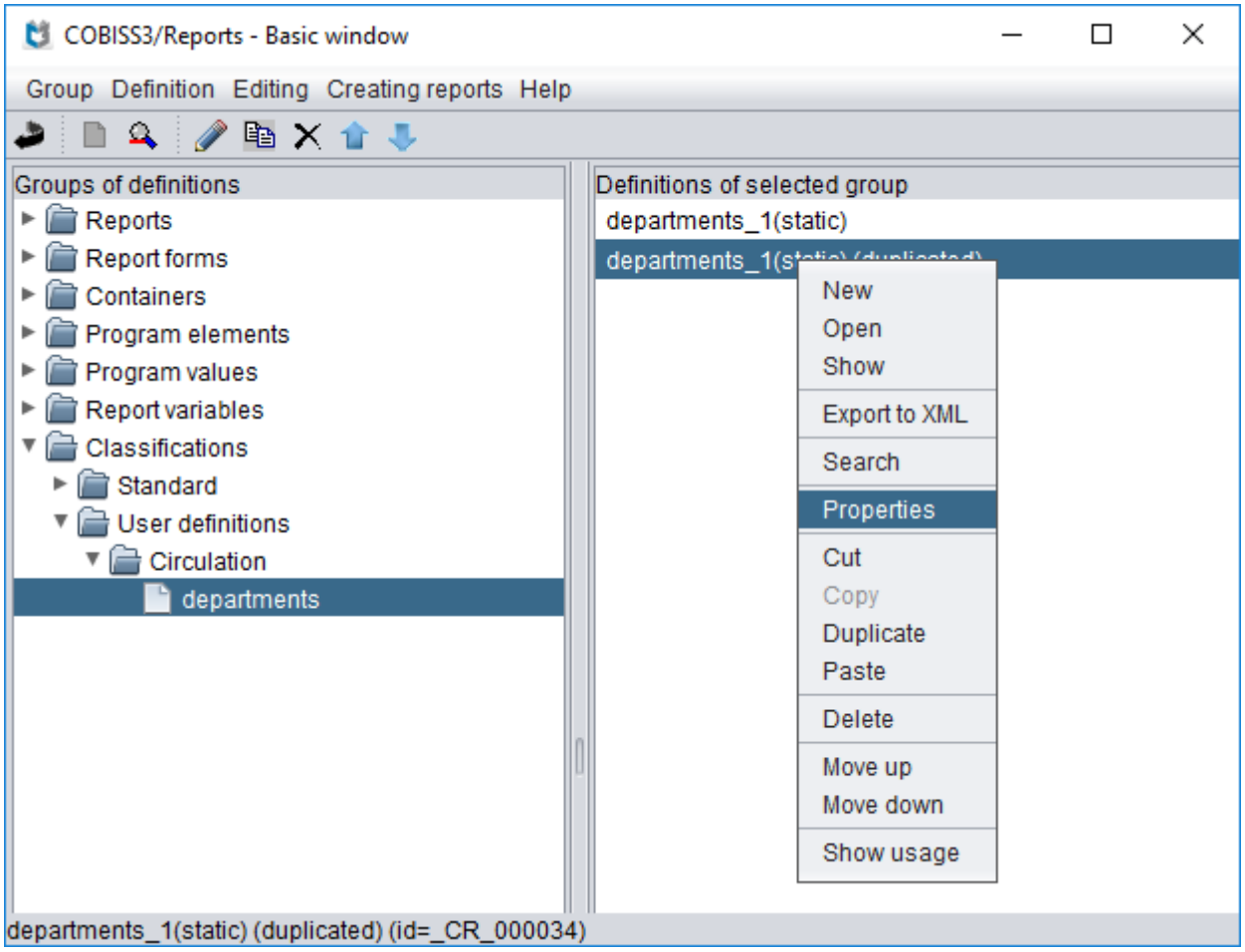

Figure 6: Classification definition properties

The **Classification definition** window will open:

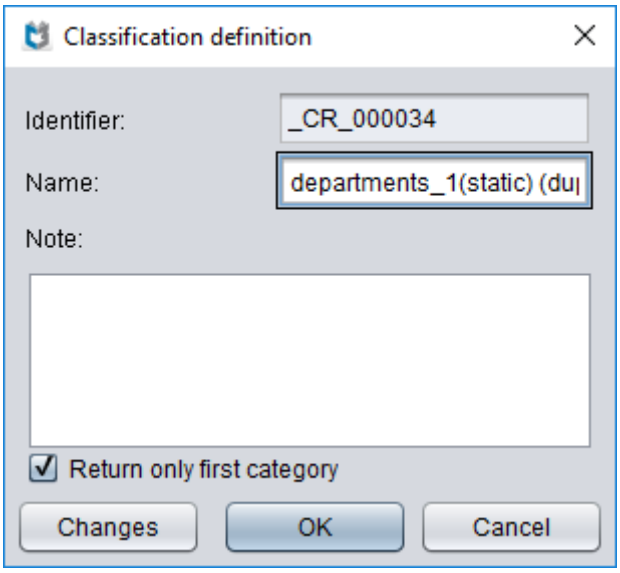

Figure 7: Editing the classification definition properties

An identifier that cannot be changed is assigned to the classification when it is created. You can edit the following data:

- "Name": enter the name of the classification definition.
- "Note": enter an additional description of the classification definition.
- If you check the "Return only first category" checkbox, the classification will return only the first category when creating the report. A value is sorted in this category according to the conditions specified for the classification; otherwise the classification will return all categories.

By clicking the **Changes** button you can see the edit history of the classification. The author and the time of last change is logged every time you edit a definition provided you save the changes.

3. Save the properties (click the **OK** button).

2.4 Editing the classification definition

You can edit the classification definition in the **Definition editing – Classification definition – <classification_name>** window.

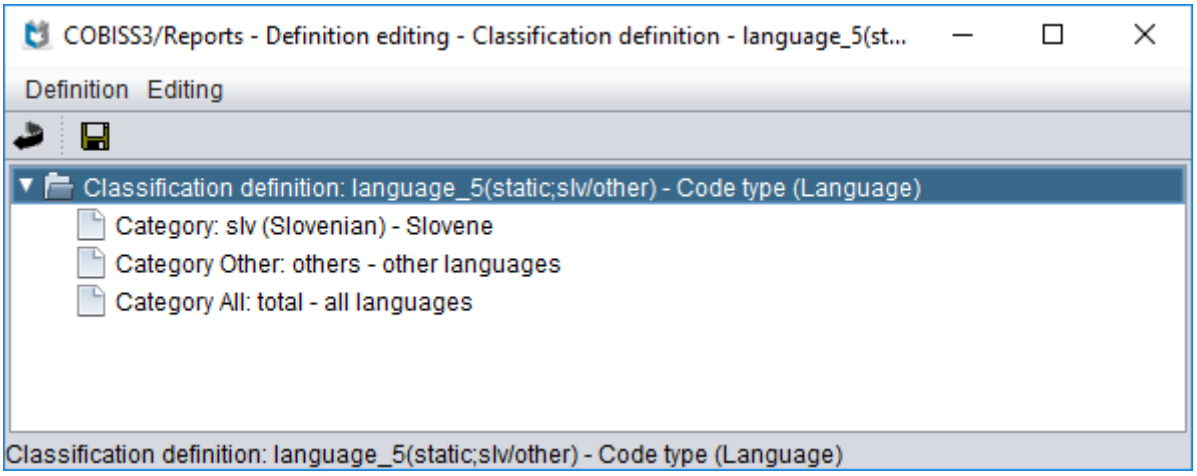

Figure 8: Editing the classification definition

The basic options for editing the classification definition are:

- "New" (adding a new category – e.g. add a new department).
- "Properties" (editing the classification properties) (see chapter *2.3*).
- "Manually editing categories" (see chapter *2.4.3*).

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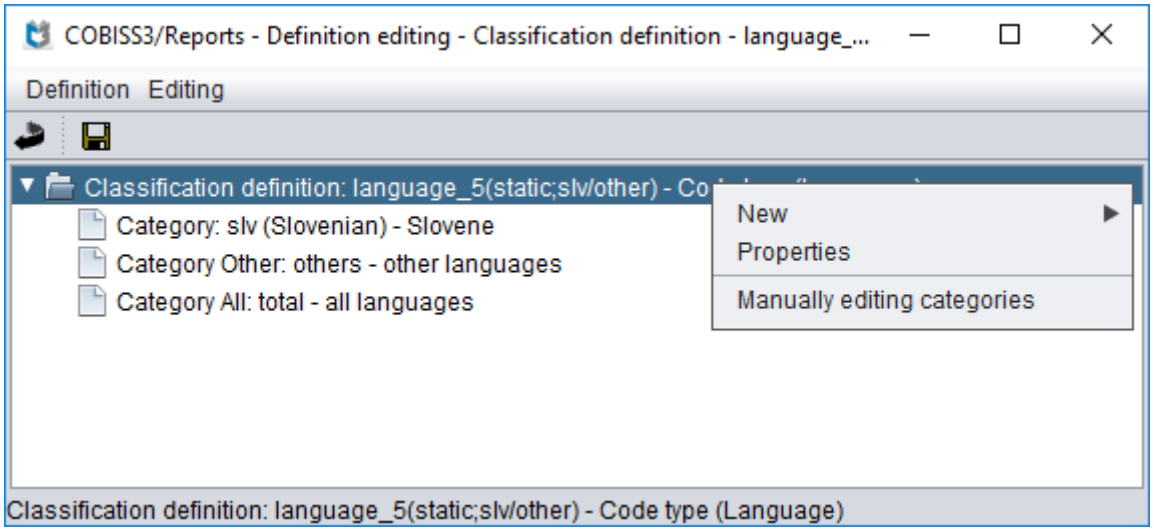

Figure 9: Options for editing the classification definition

2.4.1 Adding a new category to the classification

You can add a new classification category (e.g. in classifying by language you want the data for the material in Romanic languages to be classified separately) with the **Definition / New / Category** method.

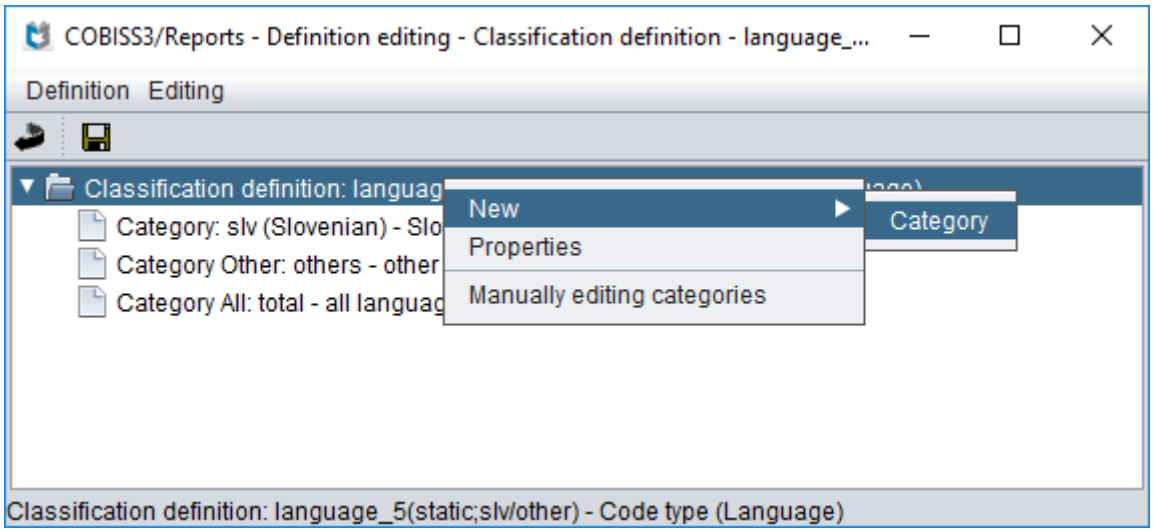

Figure 10: Adding a new classification category

1. Select the **Definition / New / Category** method in the **Definition editing – Classification definition – <classification_name>** window.
2. The **Category type selection** window will open.

   You can select one of the following values from the list:

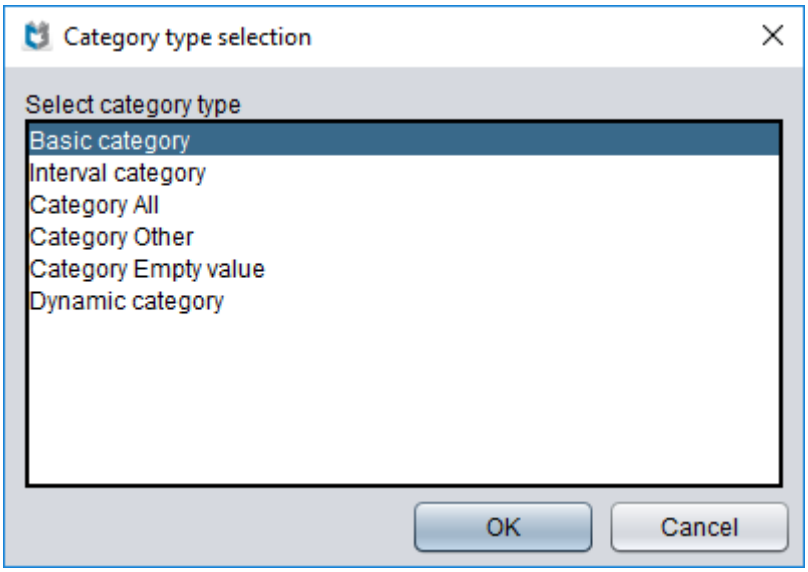

Figure 11: Selecting the category

3. After you select the category, the <*category_type*> window will open.

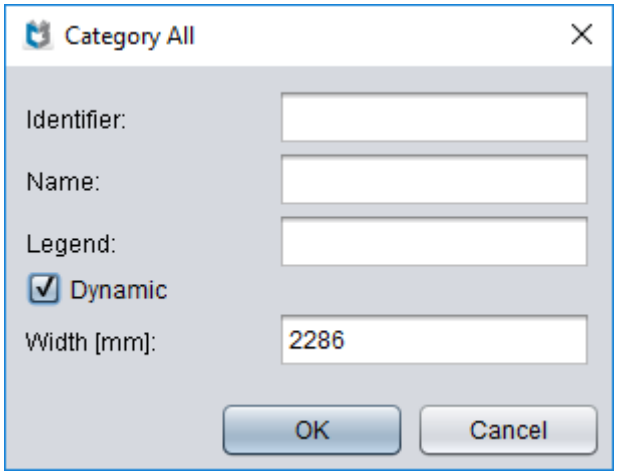

Figure 12: Data on classification category

The look of the window depends on the selected category type.

4. Edit the category properties (see chapter *2.4.2.1*).

Types of categories:

- *Basic category*: you select this category if you want to create custom categories that include various codes from the code list.

  Example: select this type if you are going to add Romanic languages category in the language classification, where you will include codes for Italian, French and Spanish.

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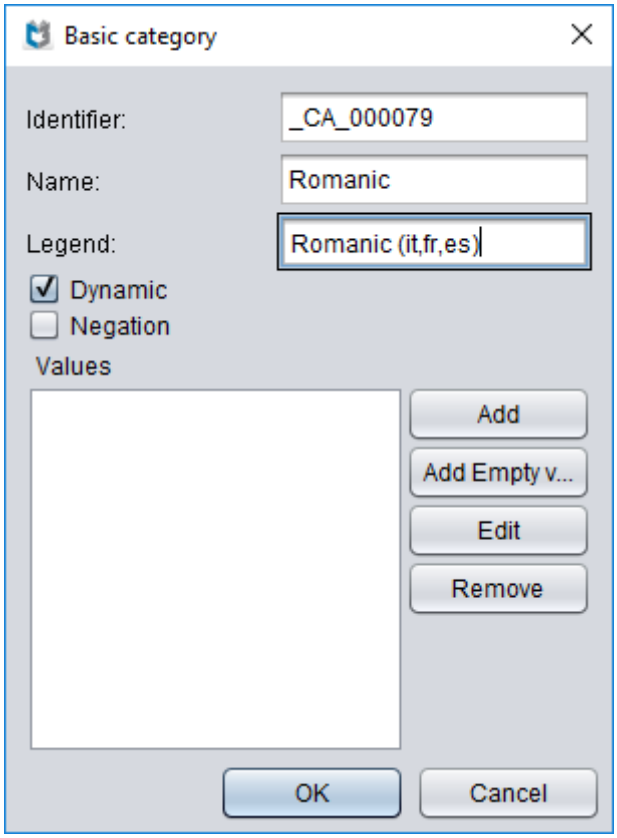

Figure 13: Basic category

Under "Name" enter the classification category name (e.g. *Romanic*) that will be shown on the report and under "Legend" enter the description in the legend (e.g. Romanic language (*it, fr, es*)). If you want this category to be shown in the statistical report only if the value is not 0, leave the checkmark in the "Dynamic" checkbox. If you want this category to always be shown in the report, remove the checkmark from the "Dynamic" checkbox. If you want to include all categories in the selected category except the ones you selected, add a checkmark to the option "Negation".

By clicking the **Add** button, you add the values that are taken into account when sorting into this category. If there is a code list available for entering data of the selected classification attribute, a code list of values will open when you click the **Add** button:

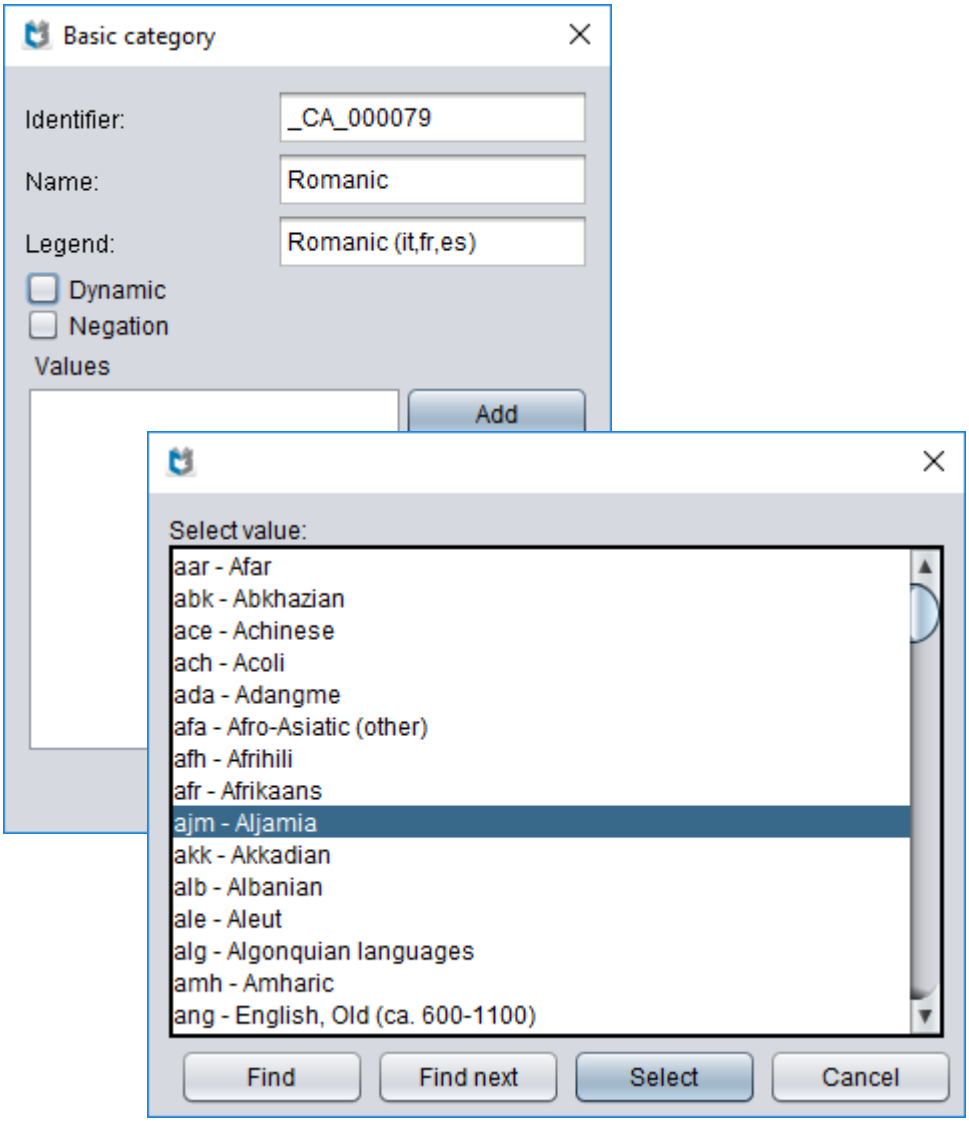

Figure 14: Selecting values in the basic classification category

Enter the values you want to include in the category or select them from the code list. By clicking the **Select** button, the value is added to the category. These are displayed in the **Basic category** window under "Values":

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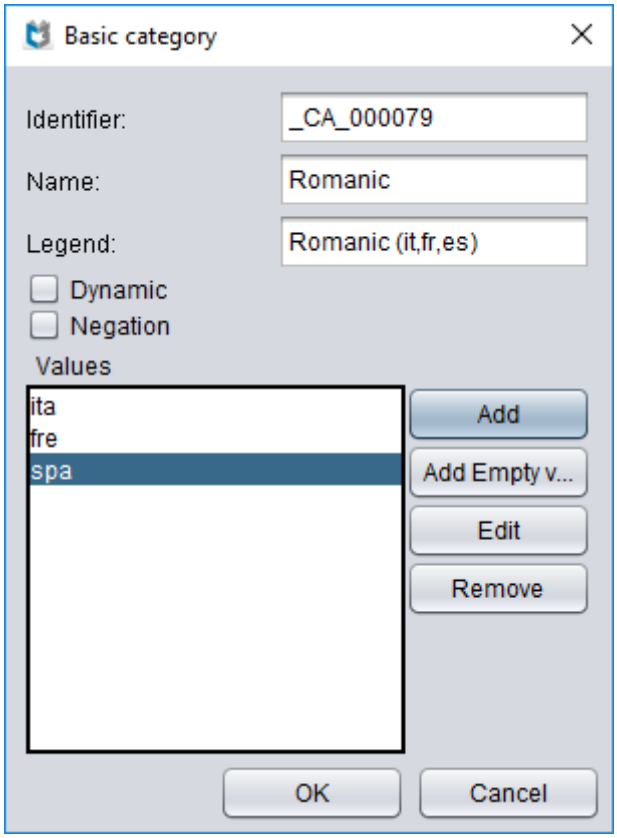

Figure 15: The values of the basic classification category

By clicking the **OK** button, the new classification category with the values you specified is added:

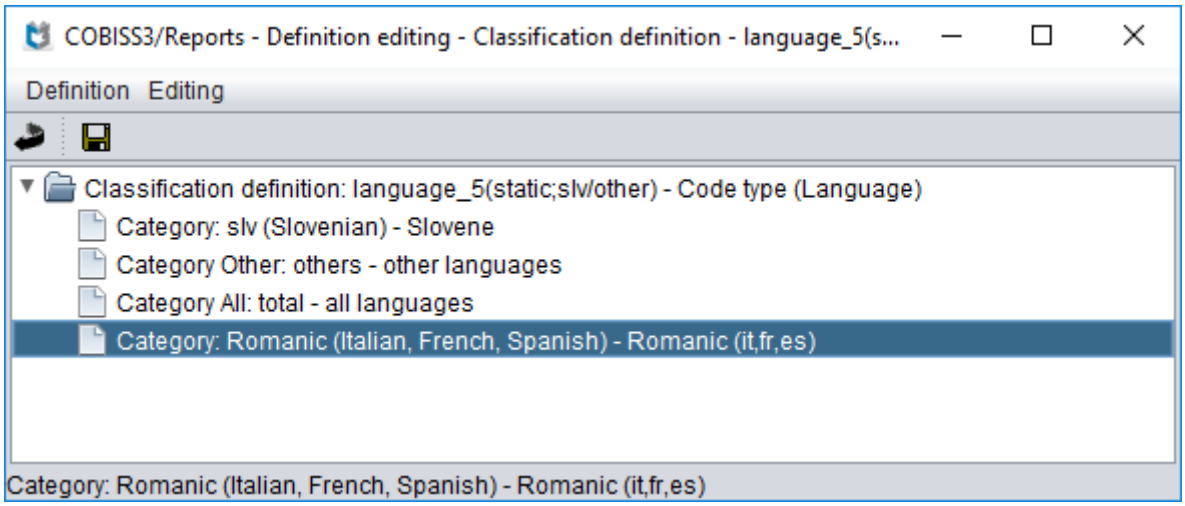

Figure 16: Classification definition with the new added basic classification category

If you want to add a new classification category, repeat the process.

If you want empty values to also be included in the new classification category, you can do this by clicking the **Add Empty value** button. If you want to remove any of the added

values, highlight it and click the **Remove** button. By clicking the **Edit** button, you can edit the value (replace it with another, change the value, etc.).

- *Interval category*: it is determined by the upper and the lower interval value (range from–to). In classifications created by users this category is not an appropriate for selection.
- *Category All:* select it if you want to include and show the number of values occurrences that are taken into account in all categories of the classification in the report. The category *All* is shown in the statistics as the column and the line *total*.

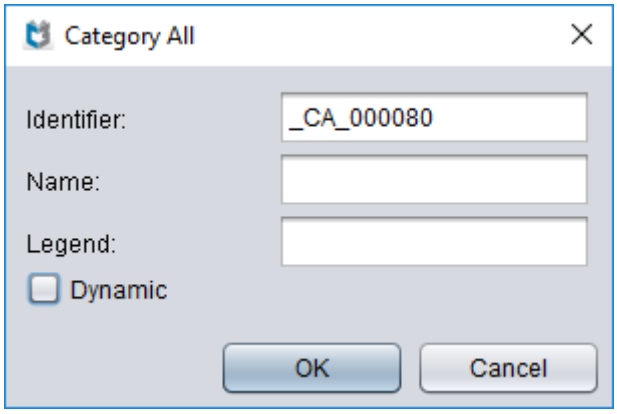

Figure 17: Properties of the category All

Specify the category name as it will be shown in the name of the column/line in the statistical report and in the legend. Also specify if this category should be displayed dynamically.

- *Category Other*: select it if you want to also include and show the number of values occurrences that are not taken into account in other classification categories in the report. The category *Other* that includes this data is shown in statistics as the column and line *other*.

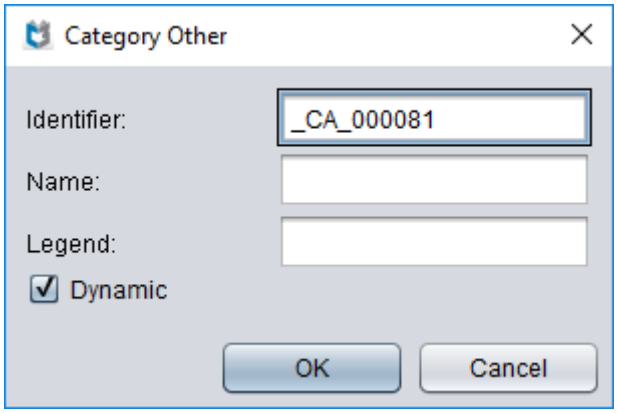

Figure 18: Properties of the category Other

Specify the category name as it will be shown in the name of the column/line in the statistical report and in the legend. Also specify if this category should be displayed dynamically.

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- *Category Empty value*: select if you want the report to take into account and show the number of empty value occurrences. The category *Empty value* that includes this data is shown in the statistics as the column and line *empty value*.

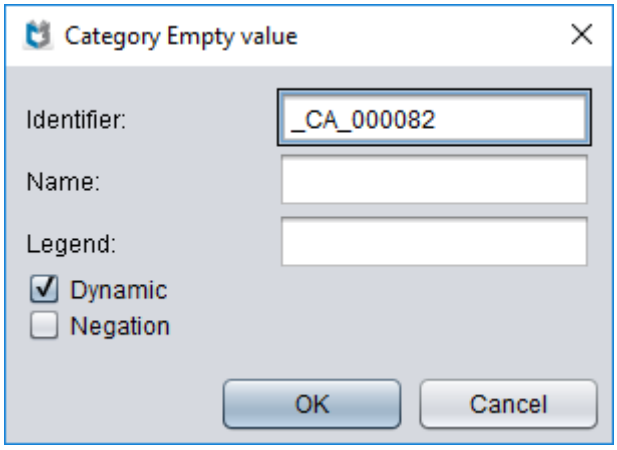

Figure 19: Properties of the category Empty value

Specify the category name as it will be shown in the name of the column/line in the statistical report and in the legend. Also specify if this category should be displayed dynamically. Check the "Negation" checkbox if you want the report to include and show only the values that are the same as those specified in the basic category.

- *Dynamic category:* select it if you want the report to include and show only the number of occurrences of the values, which are in the database.

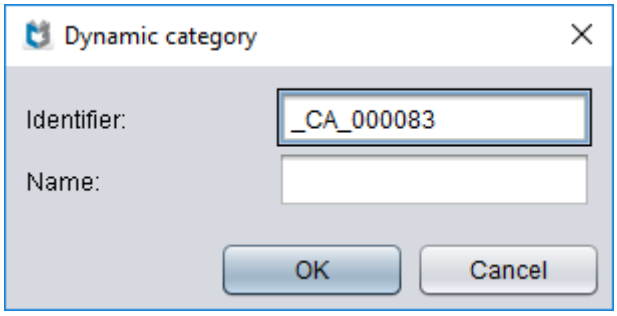

Figure 20: Dynamic category

Specify only the name of the category; value names shown in the columns, lines and legend are created automatically.

2.4.2 Editing individual categories in the classification

The options for editing individual categories in the classifications are:

- "Properties" (editing category properties)
- "Cut" (cutting the selected category)
- "Paste" (pasting the cut category one space after the selected category)
- "Delete" (deleting the category)
- "Move up"/"Move down" (moving the category)

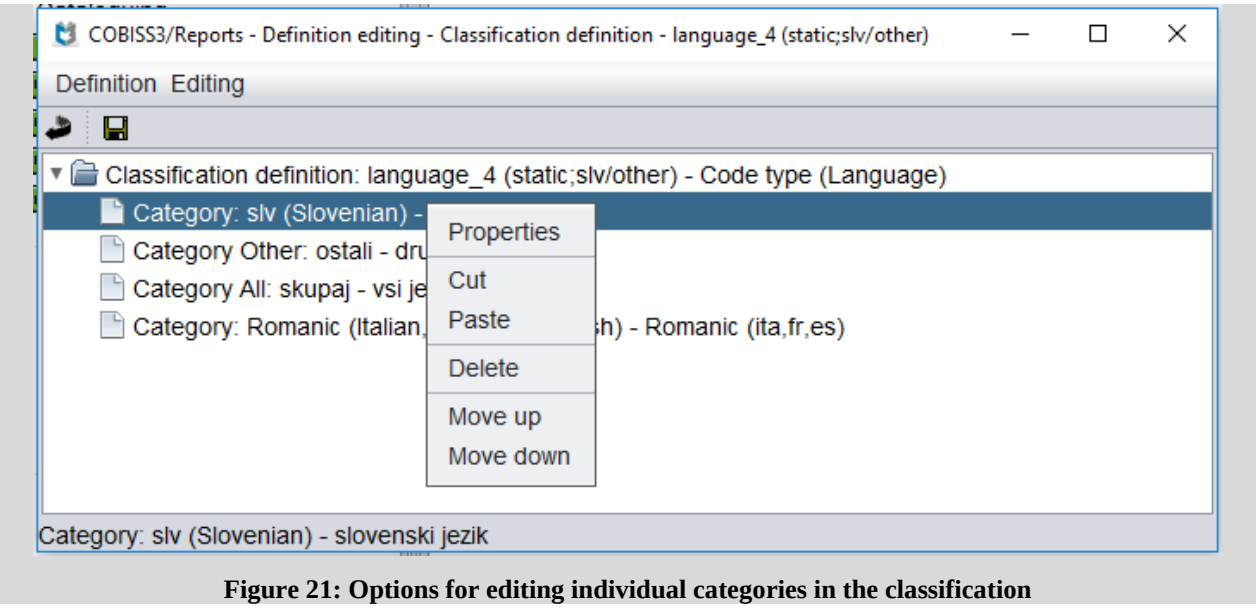

Figure 21: Options for editing individual categories in the classification

2.4.2.1 Editing category properties

Highlight the category in the **Definition editing – Classification definition – <classification_name>** window and select the **Definition / Properties** method.

Only use this option if you edited the values of the category with the option *Manually editing categories* (see chapter *2.3.1.2*) or if you want to edit the category subsequently.

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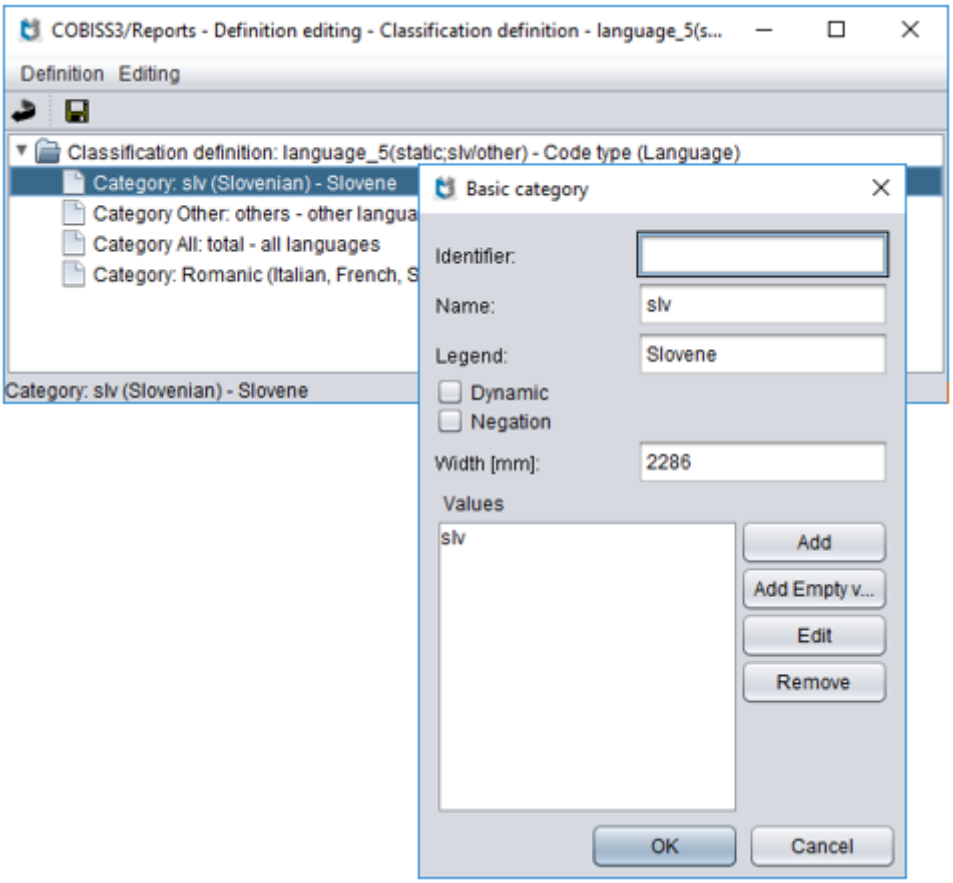

Figure 22: Editing classification category properties

The **<category_type>** window will open. The contents of the window depend on the selected category type.

You can edit the following attributes:

- "Identifier": the identifier is assigned to the category automatically; usually, you do not change it.
- "Name": edit the category name; this name is shown in statistical tables as the name of the column or the line.
- "Legend": edit the category description that should be shown in the report legend.
- The "Dynamic" checkbox: if you check the box, the report will include and show only values in the database. The report will not show codes from the code list if they do not have values in the database. If you want the report to show all codes from the code list, leave the checkbox empty.
- The "Negation" checkbox: if you check the box, the report will include and show only values that are the same as the values set in the basic category.
- "Width [mm]": specifies the width of the column in statistical tables. It is specified automatically and is generally not changed.
- "Values": edit the values by specifying various codes from the code list that you want to include in this category. You add the code from the code list by clicking the **Add** button.

The code list will open. Highlight and select the code. You can add multiple codes from the code list. If you want this category to also include empty values, you can add it by clicking the **Add Empty value** button. You can change the code from the code list by clicking the **Edit** button. A window will open, where you can enter the code or select it from the code list. The selected code can be deleted by clicking the **Remove** button.

Save the category properties by clicking the **OK** button.

2.4.2.2 Deleting a category

If you do not want to use a certain category in the classification, you can delete it:

1. Highlight the category you want to delete in the **Definition editing – Classification definition – <classification_name>** window.
2. Select the **Editing / Delete** method.

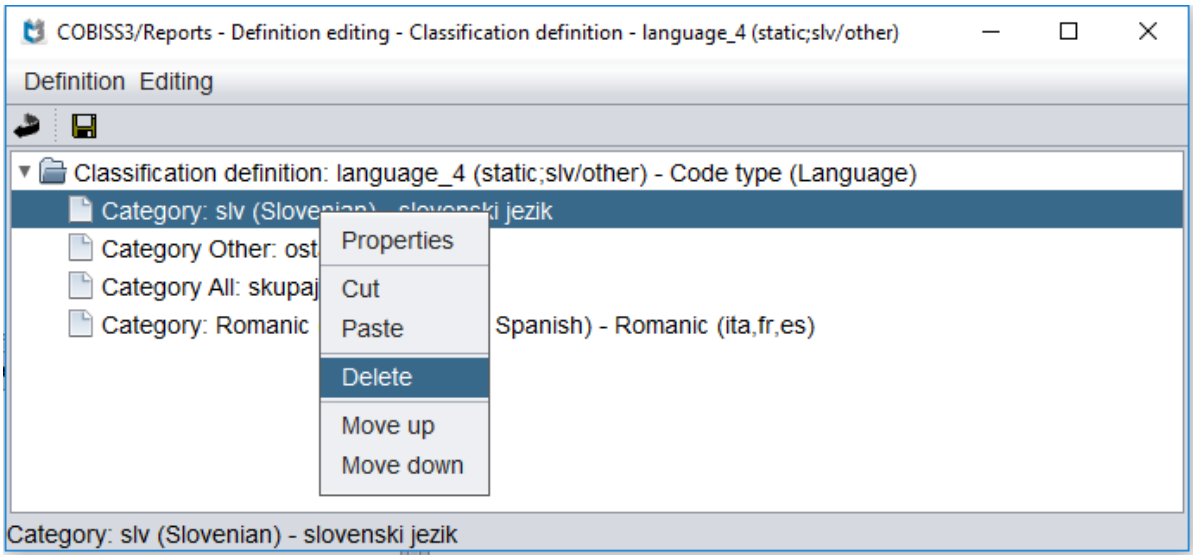

Figure 23: Deleting a classification category

A window with the question "Are you sure you want to delete?" will open.

3. Click the **Yes** or **No** button.

2.4.2.3 Moving a category

The order of the categories in the classification can be changed as needed:

1. Highlight the category you want to move up or down in the **Definition editing – Classification definition – <classification_name>** window.

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2. To move the selected category for one spot upwards, select the **Editing / Move up** method, to move the category one spot downwards, select the **Editing / Move down** method.

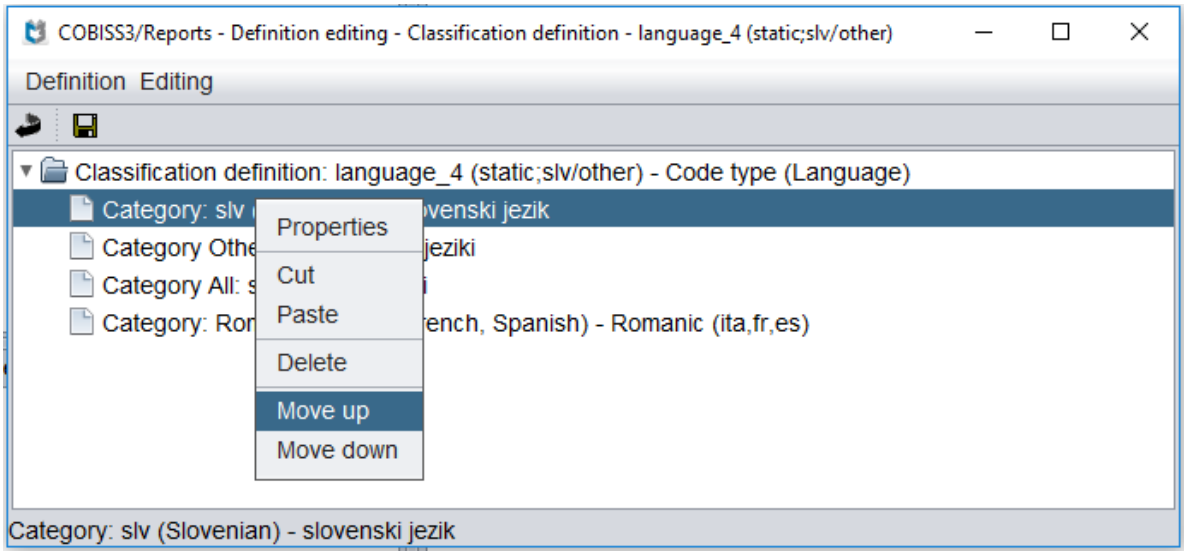

Figure 24: Moving the classification category

Note:

You can only change the order of the classifications definitions that are saved in the user definitions group.

2.4.3 Manually editing categories

Notes:

*You **only** use these options if you want to transfer the categories from COBISS2 with the copy/paste method!*

The properties of individual categories must then be edited manually (see chapter 2.4.2.1 Editing category properties).

Procedure:

1. Highlight the classification definition name in the **Definition editing – Classification definition –<classification_name>** window and select the **Definition / Manually editing categories** method.
2. The **Categories editor** window will open:

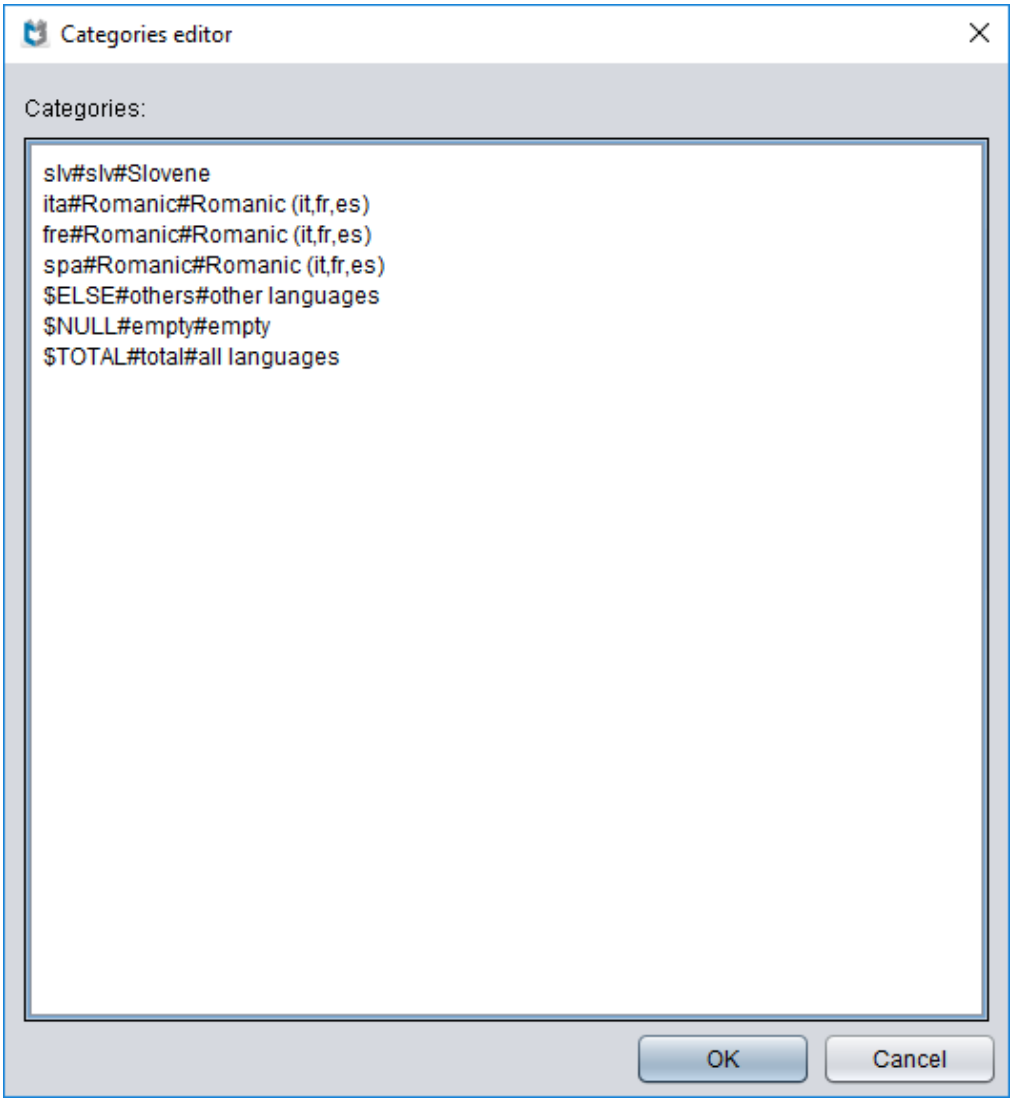

Figure 25: Editing categories with the Definition / Manually editing categories method

3. You transfer the content by pasting (e.g. from the XSTA01.TBL file) or by manually adding/changing a new category. The structure is the same as in the tables in the XSTA01.TBL file (see manual COBISS2/Reports, chapter *11.3 Predefined statistics tables*). Labels for the table name (e.g. $101A_1/Language) as well as the labels for the beginning and the end of a table (BEGIN, END) are not necessary.

   Meaning of other labels:

   - $ELSE – means that all values that are not specifically set as values in the category are classified under the value *other*.
   - $NULL – means that the number of occurrences of empty values will also be taken into account; they are classified under the value *empty value*.
   - $TOTAL – means the total amount of all values.

4. Save the category definition by clicking the **OK** button.
5. Edit the properties of individual categories (see chapter *2.4.2.1*).

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3 Selecting the classification when creating the statistical report

When creating a statistical report you can specify different types of parameters that affect the form and contents of the report:

- query parameters,
- report parameters,
- classifications parameters.

With the query and report parameters you specify, which data will be included in the report. You can also specify additional text shown in the report with the report parameters (e.g. explanation of the title). And with classifications parameters you can change the classification taken into account in the report.

As a default, the system classification definition is taken into account. If the library adapted the system definition to its needs with the definition of a user classification, the user definition is taken into account. And if you want to select a different classification when creating the report (of course by the same attribute!), select the classification you want to use in the creation of the statistical report by clicking the **Connection to the classification** button in the **Statistical parameters** option.

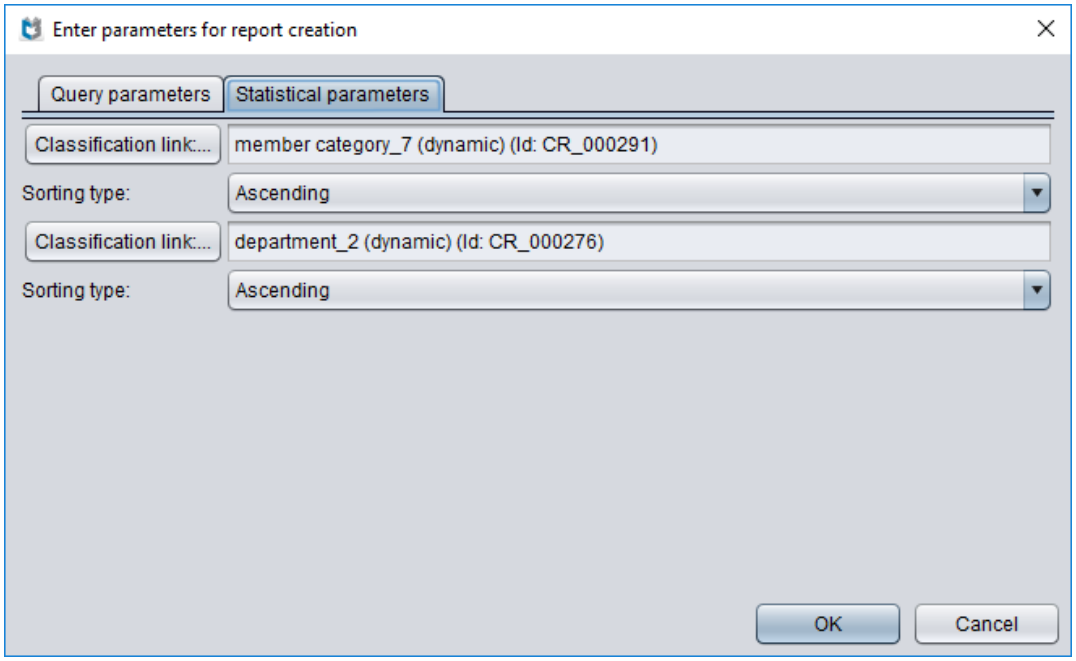

Figure 26: Classifications parameters for report creation

The **Select classification definition** window will open and there you can choose between standard or user defined classifications:

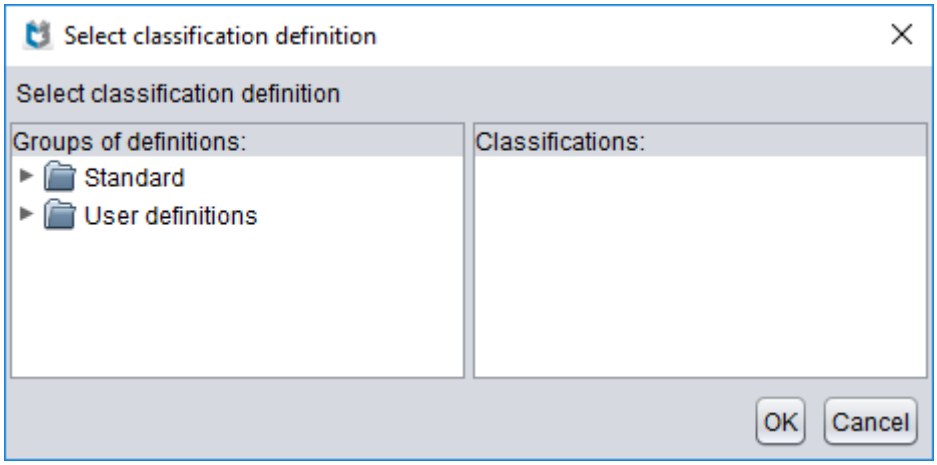

Figure 27: Selecting a classification when creating a report – selecting the definition group

Select the classification you want to use for report creation (e.g. you want to use department classification for the municipality of Maribor – *department_municipality_Maribor*).

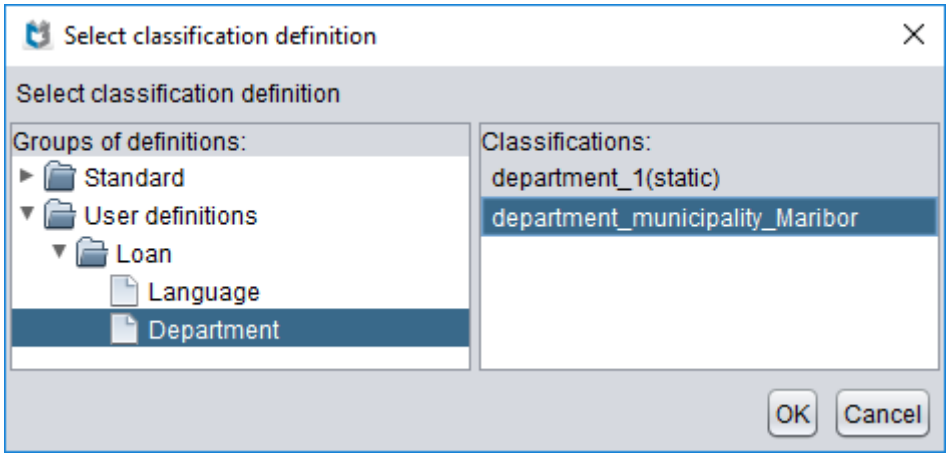

Figure 28: Selecting a classification when creating a report

You can review the classification before you choose it. You do this by highlighting the classification and right clicking the mouse. The **Show** option appears.

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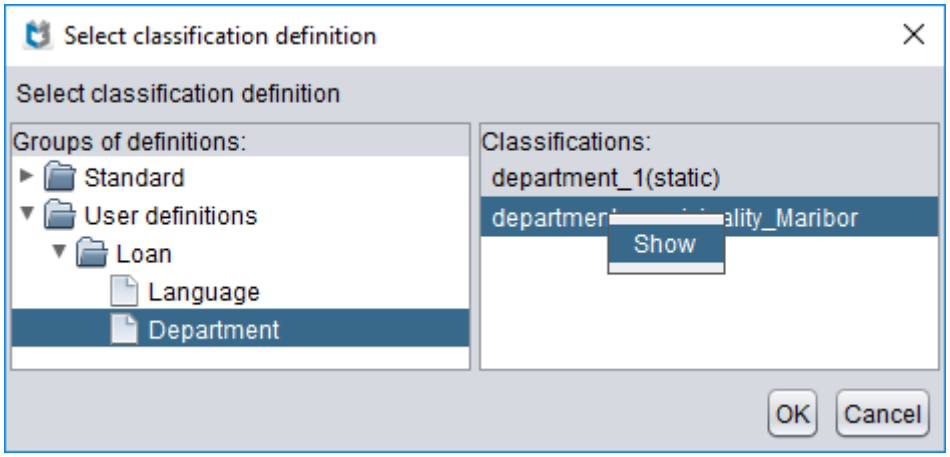

Figure 29: Reviewing the classification

The contents of the classification appear in the **Classification display** window:

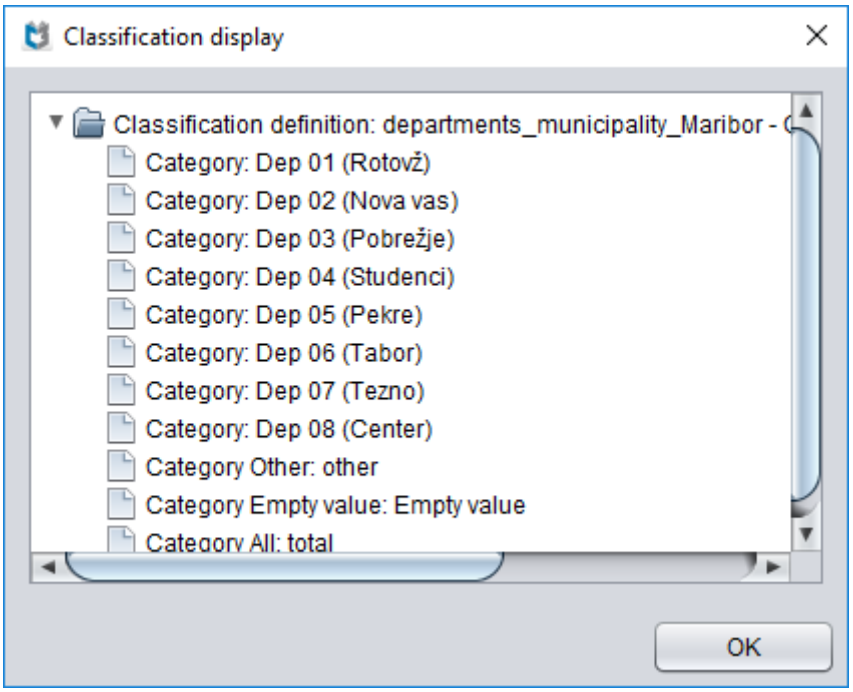

Figure 30: Classification display

After you confirm the classification selection (the **OK** button**)**, the connection to the selected classification is defined:

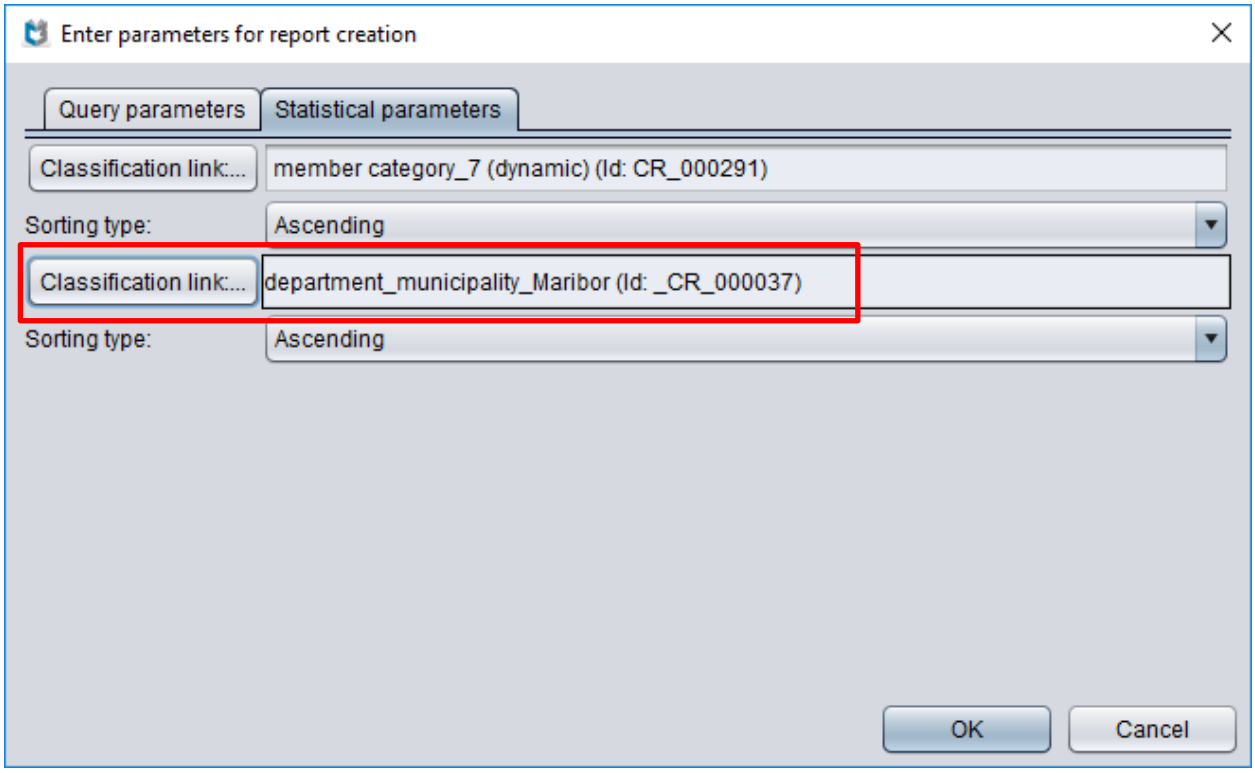

Figure 31: Considering the selected classification when creating a report

You can also specify ascending or descending sorting of data for each classification. You can select the appropriate type of sorting from the drop-down list in the **Sorting type** option.

After you confirm with the **OK** button, the statistical report is created.

Note:

*The classification selected in the **Statistical parameters** option when creating the report is considered only when creating the report. The next time you create a report, the default classification will be the one defined in the report.*

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