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Information and documentation — Bibliographic data element directory —

Part 2 : Acquisitions applications

*Information — et documentation — Répertoire des éléments de données
bibliographiques*

Partie 2 : Applications aux acquisitions



Reference number
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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

International Standard ISO 8459-2 was prepared by Technical Committee ISO/TC 46, *Information and documentation*, Sub-Committee SC 4, *Computer applications in information and documentation*.

ISO 8459 at present consists of the following parts, under the general title *Information and documentation — Bibliographic data element directory*:

- *Part 1: Interloan applications*
- *Part 2: Acquisitions applications*

Annex A forms an integral part of this part of ISO 8459. Annexes B to D are for information only.

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Introduction

Data are interchanged primarily for the purpose of starting or supporting a process. In order to transmit information required to support a process, the various elements of data in the interchanged messages must be fully understandable to the partners concerned. This part of ISO 8459 describes, in the form of a directory, data elements used to support bibliographic processes or applications.

The data elements that may occur in an acquisition transaction are presented as follows:

- a) A data element directory (clause 4) with annexes containing code values and description for message types (A.1), date types (A.2) and acquisition types (A.3) (see annex A).
- b) An index (clause 5) consisting of names, keywords and synonyms for data elements, data element groups and data element values including names assigned to specific messages, data types and acquisitions type.
- c) A structured order (clause 6) which relates similar elements in an hierarchical fashion.
- d) A matrix (clause 7) showing the data elements pertaining to specific acquisitions messages.

This part of ISO 8459 is the second part of a series which, taken as a whole, will comprise a complete data element directory for bibliographic use. This part is primarily intended for new acquisitions systems.

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Information and documentation — Bibliographic data element directory —

Part 2 : Acquisitions applications

Scope

This part of ISO 8459 specifies and describes data elements required in the interchange of data between institutions involved in the acquisition of bibliographic materials. It also identifies messages and their data elements which are used in the acquisitions process.

It is intended both for messages communicated by preprinted forms having the specified data element names as headings and by automated interchange processes.

The structuring of the data elements into messages falls outside the scope of this part of ISO 8459.

2 Normative references

The following standards contain provisions which, through reference in this text, constitute provisions of this part of ISO 8459. At the time of publication, the editions indicated were valid. All standards are subject to revision, and parties to agreements based on this part of ISO 8459 are to investigate the possibility of applying the most recent editions of the standards indicated below. Members of IEC and ISO maintain registers of currently valid International Standards.

ISO 9 : 1986, *Documentation — Transliteration of Slavic Cyrillic characters into Latin characters*.

ISO 233 : 1984, *Documentation — Transliteration of Arabic characters into Latin characters*.

ISO 259 : 1984, *Documentation — Transliteration of Hebrew characters into Latin characters*.

ISO 639 : 1988, *Code for the representation of names of languages*.

ISO/R 843 : 1968, *International system for the transliteration of Greek characters into Latin characters*.

ISO 2108 : 1992, *Information and documentation — International standard book numbering (ISBN)*.

ISO 3166 : 1988, *Codes for the representation of names of countries*.

ISO 3297 : 1986, *Documentation — International standard serial numbering (ISSN)*.

ISO 3602 : 1989, *Documentation — Romanization of Japanese (kana script)*.

ISO 3901 : 1986, *Documentation — International Standard Recording Code (ISRC)*.

ISO 4217 : 1990, *Codes for the representation of currencies and funds*.

ISO 5127/3a : 1981, *Information and documentation — Vocabulary — Section 3a: Acquisitions identification, and analysis of documents and data*.

ISO 6438 : 1983, *Documentation — African coded character set for bibliographic information interchange*.

ISO 7098 : 1991, *Documentation — Romanization of Chinese*.

ISO 9115 : 1987, *Documentation — Bibliographic identification (biblid) of contributions in serials and books*.

3 Definitions

For the purposes of this part of this ISO 8459, the following definitions apply.

3.1 acquisition: The work of increasing and bringing up to date the stock of a library or of a documentation centre or service according to their aims (ISO 5127/3a).

3.2 data element: A basic unit of identifiable and definable data. It has a data element name represented by a tag as identifier and one or more values for expressing a particular fact.

3.3 data element concept: An element of information defined so as to permit its use in a certain application area and having one or more associated values which together express a particular fact, event or occurrence in a way agreed upon by interchanging partners.

3.4 data element directory: A listing of data elements with specifications of representative data element values as appropriate.

3.5 data element group: A set of related data elements.

3.6 data element group name: One or more words in a natural language identifying a specific data element group.

3.7 data element name: One or more words in natural language identifying a data element.

3.8 data element value: A fact expressed by codes, digits or natural language corresponding to a data element description and representation.

3.9 message: A structured combination of data elements used in an acquisitions transaction.

3.10 representation: The way in which a particular data element value is expressed using one or more number(s), letter(s) or symbol(s).

3.11 tag: An identifier allocated for use in place of a data element name or data element group name.

3.12 transaction: The creation or modification of a message required to support the acquisition of an item.

4 Directory

The directory names and defines data elements and data element groups used to support acquisitions transactions. The information pertaining to each data element or data element group is presented in four separate columns, labelled tag, name, description and representation. A "tag" is used to identify a data element as well as a data element group. "Name" is a short form for "data element name or data element group name". Data element group names are printed in bold letters to differentiate them from data element names. "Description" includes a definition for each data element or data element group followed by a list of corresponding tags for data elements that comprise the group. "Representation and remarks" includes explanatory text about conventions and/or standards used to represent values applicable to a data element or a data element group as well as sample values, if applicable. Unless otherwise specified, each data element value is represented by a variable length alphanumeric string and its equivalent in coded or abbreviated form is not listed.

Tag	Name	Description	Representation and remarks
001	Message identification	Data elements used to identify a particular message. Group identifier for data elements 002-005.	
002	Message type	Phrase or code identifying the function of a message.	Can be communicated as text or as a code (see A.1).
003	Date	Year, month and day on which a transaction is performed.	Used in conjunction with date qualifier (751). See A.2 for the various dates that can be specified.
004	Time stamp	Time at which a message was sent or received.	Used by automated systems to indicate the precise hour, minute and second that a message was communicated. Used in conjunction with date (003).
005	Transaction number	Code or number assigned to a document or message exchanged in the acquisition process (i.e. order, invoice, claim, etc.).	This number is assigned by the institution responsible for creating the specific type of document or message (i.e. order, invoice, claim, etc.). Whenever a single document or message identifies multiple items, each item may also be identified by an acquisitions number (006) or an item number (007).
006	Acquisitions number	Number which identifies an item in all documents or messages associated with the acquisition of that item.	This number is created by the source of an acquisition transaction. See also ISBN (313), and ISSN (314) which are item numbers that appear on the item itself and which could be used as an acquisitions number.
007	Item number	Sequential number pertaining to an item in a multi-item document or message.	This data element is used in multi-item documents or messages (i.e. purchase orders, invoices, etc.).
010	Multi-item indicator	Word or code used to indicate that the acquisitions transaction (i.e. order, invoice, claim, etc.) applies to more than one item.	

Tag	Name	Description	Representation and remarks
015	Correspondence reference	Codes or numbers used to identify correspondence relating to a transaction.	This data element is used to identify the following functions or roles: 0 purchaser 1 supplier 2 claimant 3 payer 4 editorial office 5 exchange centre For requester or originator identification, see 802. This data element is used in conjunction with data elements for an institution's or individual's address and name, if necessary. The following values are used: 0 ship to 1 bill to 2 write to 3 return to 4 inquire of This data element is used to identify the following functions or roles: 0 sender 1 recipient 2 intermediary This element may be used in conjunction with the name of institution (111) or originator's name (803). For telenetwork addresses, see 120. May be used in conjunction with the name of institution (111) or originator's name (803).
050	Transaction participant	Data which identifies each party associated with an acquisition transaction and the role performed by that party.	
		Group identifier for data elements 080 to 125.	
080	Participant's function	Word or code which specifies the function or role performed by a party to an acquisition transaction.	
090	Address instruction	Word or code which indicates the address to which the item(s), invoice(s), status report(s), etc. are to be sent if different from the address for the source of the message.	
100	Communicator's function	Word or code which identifies a party to an acquisition transaction as either the sender, intermediary or the recipient of a message relating to the transaction.	
110	Institution identification	Data elements intended to identify an institution. Group identifier for data elements 111 to 117 and 910.	
111	Name of institution	Word, phrase or initialism intended to identify an institution or corporation.	
112	Address	Code or phrase which gives the geographic location or place associated with an individual or an institution. Group identifier for data elements 113 to 116 and 140.	
113	Street and number	Number and phrase used to identify a location of a building within a town, a city or rural area.	
114	City	Phrase used to identify a town or city, including suburb or postal area.	
115	Country	Phrase used to identify a country.	
116	Postal code	Code assigned by the postal authorities of a country that uniquely identifies an address or group of addresses.	
117	Abbreviated name	Short form for the name of institution (111).	
119	Post Office box	Box number assigned by the post office.	
120	Telenetwork address	Unique number or code used to identify a device within a communications network. Group identifier for data elements 121 to 127.	
121	Telephone number	Unique number assigned to a telephone line.	

Tag	Name	Description	Representation and remarks
122	Telex number	Unique number assigned to a telex connection.	
123	Answer back code	Unique code which identifies the sender of a telex communication.	
124	Electronic mail number	Unique number assigned to an electronic mail box or service connection.	
125	System user identification	Unique number or code assigned to a participant in a communications network.	
126	Teletex number	Unique number assigned to a teletex connection within a teletex communications system.	
127	Telefacsimile number	Telecommunications number used for sending and receiving telefacsimiles.	
130	Institution code	Unique identification for the name and address of an institution.	
131	Institution code type	Code or phrase identifying the scheme used to assign a value for the institution code (130).	
140	Region	Word or phrase identifying an area within a country, e.g. state, province, county, etc.	
300	Item description	Data elements used to identify an item, usually consisting of descriptive information and headings. Group identifier for data elements 301 to 334.	
301	Author	Name of person or corporate body responsible for the intellectual or artistic content of an item, including composers, creators or originators of an item.	Possible values are 0 customer number 1 membership number 2 standard address number (SAN) 3 other An item may be a component part within a host publication or an independent document. In the former case, information about each item must be provided. Data element 303 is used to differentiate the descriptions for the component part and the host publications. This concept includes composers, creators or originators, editors, illustrators, translators, etc. of an item. Certain national practices stipulate that the author's name should be in a structured form. Structuring the name is a practical consideration for file access; however, this part of ISO 8459 makes no specifications in this regard.
302	Title	Name of the item, consisting of a word or group of words intended to identify it.	Various kinds of titles, including key title, uniform title, etc. constitute this data element.
303	Bibliographic level	Word or code used to characterize the bibliographic form in which the item appears.	Possible values include 0 monograph 1 serial 2 component part 3 collection
304	Physical medium	Word or code identifying the medium in which the item has been produced.	Possible values include 0 printed material 1 roll microfilm 2 microfiche 3 sound recording 4 moving projected recording 5 video recording 6 machine-readable 7 three-dimensional object 8 tactile (braille, etc.) 9 manuscript 10 multi-media 11 graphic material (pictures, posters, etc.) 12 still projected material (slide, filmstrip, etc.) 13 other

Tag	Name	Description	Representation and remarks
305	Edition	All the copies of an item produced from one master copy or substantially the same type image, having the same content, and, in the case of non-book materials, issued by a particular publishing agency or group of such agencies.	This data element may also be used for distributor or producer, if applicable.
306	Publisher	Person or organization responsible for the publication of an item.	
307	Place of publication	Geographical location of the publisher, or, failing this, of manufacturer.	
308	Publication date	Year and, if applicable, the month and day of publication of an item.	
309	Volume designation	Identifier of a unit of a serial or multi-volume monograph.	
310	Issue designation	Number, letter or word identifying a unit of an item which is published in parts.	
311	Pagination	Numbering of the pages of an item.	
312	Item identification number	Alphanumeric codes used to identify an item. Group identifier for data elements 313 to 319.	
313	ISBN	International standard book number assigned to a monograph.	
314	ISSN	International standard serial number assigned to a serial title.	
315	Biblid	Code composed of alphanumeric and special characters designed to provide a unique identification for articles/contributions in serials and contributions in books containing separate works by various authors.	
316	Type of number	Word or code used to identify the item number scheme.	Possible numbering schemes include 0 patent number 1 CODEN 2 catalogue number 3 SISAC number 4 ADONIS number 5 other
317	Bibliographic record identifier	Unique identifier assigned to a bibliographic record for an item.	
318	Other item number	Any item identifier other than ISBN (313), ISSN (314) or biblid (315).	
319	International Standard Recording Code (ISRC)	Standard code (ISRC) for the unique identification of recordings or parts of a recording in audio, video and audiovisual recordings.	
321	Series	Name given to a number of separate publications related to one another by the fact that each bears a collective title applying to the group or subgroup as a whole as well as its own title.	
322	Binding type	Type of cover specified for the item ordered.	Possible values include 0 paperback 1 cloth 2 library 3 other

Tag	Name	Description	Representation and remarks
323	Document type	Characterization of the item ordered based on the circumstances of its publication.	Possible values include 0 dissertation 1 conference paper 2 technical report 3 patent 4 working paper 5 government publication 6 other
324	Frequency	Intervals at which a serial is published.	Possible values include 0 daily 1 weekly 2 monthly 3 bi-monthly 4 quarterly 5 annually 6 semi-monthly 7 semi-annually 8 irregularly 9 biennially 10 other
325	Special supplements	Extra section or number accompanying a normal issue of a newspaper or periodical.	
326	Accompanying material	Description of other material associated with an item.	
327	Number of volumes	Number of physical volumes, including fiche, reels, records, boxes, kits, etc., comprising an item.	
328	Size of item	Physical dimensions of an item.	The format of music publication (e.g., score, parts) is found here. Also, could be used to record "run time" and other details pertinent to audiovisual materials.
329	Form of item (technical specifications)	Technical specifications constraining the use of the item; e.g. gauge of film or reduction ratio of microfilm, microcomputer software version, size of computer disk or computer cassette, diskette format, acid-free paper, etc.	
334	Language	Word or code identifying the language in which the item has been written.	See ISO 639.
335	Transliteration/transcription	Code or phrase used to identify the scheme for representing the characters of an entirely alphabetical system of writing by the characters of the conversion alphabet, or representing the characters of a language, whatever the original system of writing, by the phonetic system of letters or signs of the conversion language.	Possible values include 0 ISO 9 1 ISO 233 2 ISO 259 3 ISO/R 843 4 ISO 3602 5 ISO 7098 6 others
340	Acquisitions priority	Word or code indicating the degree of urgency applying to the order of a single item.	Possible values include 0 rush 1 routine 2 other
400	Acquisition details	Data elements which provide acquisitions control information other than delivery conditions (401), claim descriptors (514) and invoice details (415). Group identifier for data elements 007, 322, 445, 450, 460-461, 470, 500, 570-571, 600-601, 816-817, 824-825, 826, 828, 834, 858, 880, 885, 886 and 905.	
401	Delivery conditions	Data elements which describe the delivery conditions pertaining to a specific shipment. Group identifier for data elements 402 to 409.	

Tag	Name	Description	Representation and remarks
402	Combined shipment	Number of orders represented in a single shipment or on a single invoice.	Possible values include n number of orders 0 unspecified number of orders
404	Free on board (FOB)	Location from which shipping charges are computed.	Possible locations include 0 customer 1 vendor 2 distributor 3 manufacturer/printer
406	Transportation mode	Means of transporting the item(s).	Possible values include 0 book rate 1 express prepaid 2 air mail 3 parcel post 4 ship best method 5 hold for pick-up 6 air cargo 7 other
407	Transportation payment	Terms for payment of the shipping charges.	Possible values include 0 prepaid by vendor 1 collected from customer on delivery 2 shipping and invoice charges paid by customer on delivery 3 shipping and invoice charges billed to customer
408	Total weight	Total weight of a single shipment.	
409	Number of cartons	Total number of cartons used in a single shipment.	
415	Invoice details	Group identifier for data elements 420 to 505.	
420	Item charge	Nature of charge associated with an item(s). Group identifier for data elements 421 to 433 and 441.	
421	Currency code	Code for the currency in which the price of the item is expressed.	See ISO 4217. This code may be used to identify item charges defined by data element 422 to 443 whenever such charges must also be represented in one or more currency equivalents.
422	List price	Basic price of an item as published in a catalogue, price list or advertisement which may be subject to trade, quantity and other discounts.	
423	Extended price	Cost of a multiple-copy order.	
424	Unit price	Price of one copy of the item ordered.	
425	Net price	Unit price of one copy of the item ordered less any discount.	
426	Price qualifier	Word or code which denotes special factors determining the price of an item.	Possible values include 0 bid price 1 remainder price 2 library price 3 educational institution price 4 prepaid price 5 firm price 6 other
427	Special charges and taxes	Charges and taxes not accommodated by other data elements in 421 to 443.	
429	Unit cataloguing service price	Cost of the cataloguing services provided for one unit of the item ordered.	
430	Net cataloguing service price	Unit cataloguing service price (429) less any discount.	
431	Transportation charge	Cost of transporting the item(s).	The amount should be preceded by a currency code (421) if the currency being used is not apparent.

Tag	Name	Description	Representation and remarks
432	Tax	Tax charges pertaining to an item or all the items on a single invoice.	
433	Appraised value	Value of an item as determined by a professional appraiser or by an authority recognized as competent to make such judgements.	Applies typically to items which have been donated or which are rare or valuable.
434	Invoice total	Total amount to be paid for the items and any other charges on a specific invoice.	
435	Invoice copies	Number of copies of an invoice pertaining to a particular shipment.	
436	Invoice location	Indication of where an invoice slip(s) can be found with a shipment.	Possible values are 0 outside of package 1 enclosed 2 mailed under separate cover
437	Value-added tax (VAT)	Multistage sales tax levied at each point where goods or services are exchanged.	
439	Payment enclosures	Information required by the supplier to accompany a payment in order to facilitate matching the payment to the corresponding invoice(s).	Possible values are 0 no enclosure 1 invoice number(s) on cheque stub 2 copy of invoice returned 3 other
440	Terms of payment	Terms according to which a specific invoice is to be paid.	Possible values are 0 cash on delivery 1 30 days net 2 other
441	Discount	Rate or value by which the supplier reduces the price of an item.	
442	Credit amount	Monetary value credited to the customer's account.	
443	Small invoice fee	Code or phrase which indicates whether an additional fee for small invoices will be charged.	Possible values are 0 cancel additional fee 1 additional fee applied
445	Fund identifier	Reference to a fund or account used to pay for the item(s) ordered.	
450	Account number	Number of an account to which a credit or debit is made.	
460	Not-to-exceed action	Action to be taken by the supplier when the customer sets a maximum monetary value on an order.	Possible values include 0 no action 1 cancel balance of order exceeding amount at 461 2 cancel entire order
461	Not-to-exceed amount	Maximum monetary value that is authorized to be spent to acquire an item or total order.	
470	Number of copies	Quantity, or the number of duplicates, of an item.	
500	Acquisitions type	Word or code describing the conditions under which an item is being acquired.	See A.3.
505	Invoice type	Type of invoice applying to a shipment of ordered items.	Possible values include 0 regular 1 supplementary 2 membership 3 subscription renewal 4 price change 5 service charge 6 pre-publication offer 7 other
514	Claim descriptors	Group name for data elements pertinent to a claim notice (515 to 545).	

Tag	Name	Description	Representation and remarks
515	Claim type	Word or code that specifies why a claim is being made.	Possible values include 0 order overdue 1 invoice not received 2 invoice received but item(s) missing 3 item(s) received but invoice missing 4 other
525	Claim history	Ordinal number of the claim (first, second, etc.).	Possible values include 1 first claim 2 second claim 3 third claim 4 other
535	Reason(s) for claim	Identifies the problem(s) giving rise to the claim.	Possible values include 0 issue(s) not received 1 no issues received this order 2 damaged in transit 3 imperfect copy 4 no response to previous claim 5 shipment incomplete 6 wrong title/edition 7 other Additional examples which apply mainly to serials are given in B.1.
545	Response(s) to claim	Specifies the supplier's response to a claim.	Possible values include 0 replacement sent 1 order entered starting with 2 delay in publication/date expected 3 issue combined with 4 frequency changed/new frequency 5 title changed/new title 6 never published 7 discontinued publication/last issue published 8 mailed when published/reorder at X amount 9 out of print/subscription extended to 10 out of print/will reprint or supply 11 out of print/no further action 12 error in claim information 13 too early to claim 14 too late to claim/reorder at X amount 15 claim partially filled 16 other Additional examples which apply mainly to serials are given in B.2.
550	Credit confirmation	Code or phrase which confirms that a credit adjustment has been made to the customer's account.	
555	Credit justification	Reason(s) a credit is given.	Possible values include 0 credit 1 title not ordered 2 cancelled order 3 shipment refused 4 short shipment 5 lost in transit 6 defective merchandise 7 adjustment to previous credit memo 8 error on invoice 9 tax credit 10 other
570	Cataloguing service	Cataloguing products requested from the vendor for a particular item.	Possible values include 0 none 1 full processing 2 partial processing 3 other

Tag	Name	Description	Representation and remarks
571	Cataloguing quantity	Number of a cataloguing product (i.e. cards, kits, etc.) requested by the customer.	The required number must be specified.
600	Total titles	Total number of distinct bibliographic items relating to an acquisitions transaction, (i.e. invoice, purchase order, shipment, etc.).	
601	Total units	Total number of physical units relating to an acquisitions transaction (i.e. invoice, purchase order, shipment, etc.).	
751	Date qualifier	Word or code which identifies an activity or condition that will happen or that has happened on a given day.	See A.2.
755	Accession number	Number assigned to an item according to the order of its entry into a collection.	Includes accession number and copy statement used as a shelf-location device. Possible values include 0 Dewey Decimal Classification 1 Universal Decimal Classification 2 other
756	Call number	Notation assigned to an item indicating its physical location in the owner institution.	
757	Classification scheme	System for the arrangement of books and other material in a logical sequence according to subject or form.	
758	Classification number	Number assigned to an item from a classification scheme.	
759	Edition of classification scheme	Identification of the edition of the classification scheme from which the classification number was taken.	
760	Copy number	Number(s) and/or letter(s) added to the call number of an item to distinguish different copies of the same item.	
800	Local processing	Various details concerning local handling of transaction. Group identifier for data elements 802 to 815.	
802	Originator's identification	Identification of the person suggesting the acquisition of an item. Group identifier for data elements 803 to 812.	
803	Originator's name	Name of the person suggesting the acquisition.	
804	Originator's identifier	Number or code used to identify the originator uniquely.	
811	Originator's affiliation	Name of the institution with which the originator is associated.	Possible values include 0 yes 1 no 2 unknown
812	Originator's status	Professional level or position of the originator.	
813	Item available in system	Indication as to whether an item suggested for acquisition is already available within a library system to which the institution receiving the request belongs.	
814	Catalogues searched	Specific catalogues of an institution's collection which have been searched to determine that an item suggested for acquisition does not already reside there.	
815	Reference source	Any source used to identify or locate an item.	
816	Originator's signature	Name, written in the person's own hand, of the person suggesting the acquisition.	

Tag	Name	Description	Representation and remarks
817	Substitute option	Indication that another item may or may not be substituted for the identified item.	Possible values include 0 specific item required 1 earlier printing or edition 2 later printing or edition 3 any printing or edition 4 other language edition 5 same subject coverage 6 same author 7 microform positive 8 microform negative 9 photocopy 10 other
818	Binding substitution	Indication of the type of binding that is an acceptable substitute, if any.	Possible values include 0 no substitution 1 any substitution 2 paper substitute 3 other
824	Authorizing officer	Name or identifier of the person who authorizes a transaction.	
825	Authorizing officer's signature	Name, written with his own hand, of the person handling a transaction.	The signature may be in full or initialled form.
826	Purchase authorization	Statement or other indication that the purchase has been validated.	
827	Cancellation extent	Word or code used to indicate whether the cancellation applies to the entire contents of a requested purchase, claim, etc.	Possible values include 0 entire contents 1 partial contents If a portion of a previous request is being cancelled then the individual items subject to cancellation must be identified (see also 460).
828	Confirm cancellation request	Customer's request that the supplier confirms the cancellation of a specific purchase order.	Possible values include 0 no 1 yes This value is set in a cancel request message (A.1 code 10); if customer requires a cancel response message.
829	Reason(s) for cancel	Customer's reasons for wanting to cancel an item.	
834	Item identification instruction	Customer's instruction to the supplier to identify purchase orders in correspondence or invoices by specific data elements, such as item number, author and title.	
858	Reason(s) for return	Customer's reasons for wanting to return an item.	Possible values include 0 wrong title ordered 1 order was cancelled 2 damaged 3 overstock 4 order duplicated 5 wrong title sent 6 arrived too late 7 ordered paperback 8 ordered hard cover 9 other
876	Invoice cleared	Phrase or code which indicates that an invoice has been approved by the customer.	
878	Invoice paid	Phrase or code which indicates that an invoice has been paid.	

Tag	Name	Description	Representation and remarks
880	Status codes	Listing of possible status reports by either the customer or the vendor.	Possible values include 0 bindery 1 due recorded 2 expedited to publisher 3 to follow shortly 4 new edition in preparation 5 not known 6 not yet published 7 expected date 8 on order from publisher 9 out of print 10 temporarily out of print 11 cloth edition out of print, paperback available 12 out of stock 13 sold, will search and quote 14 sold, order cancelled 15 publisher's address required 16 reprinting 17 reprinting under consideration 18 paperback out of print, cloth edition available 19 other
886	Back order code	Instruction as to whether an unfilled order is to be retained by the supplier for future delivery.	Possible values are 0 do not back order 1 back order if out of stock 2 back order if not yet published 3 other
905	Notes/Remarks	Any pertinent information that is not covered or amplified by a specific data element.	This data element may appear more than once in an acquisition transaction and may enlarge upon or qualify any number of different data elements, as well as convey information not covered by particular data elements.
910	Official seal of institution	Design, initial or other device placed on an acquisitions document and serving to identify an institution in an official manner.	
915	Sponsoring body	Corporate body or organization that issued the item or that is associated with its authorship.	
920	Representation code	Code used to identify the way a given data element is expressed.	Possible specifications include 0 text 1 coded 2 pictorial This code is used to identify the form in which a given data element is recorded, if needed, and when the form is not explicit in the data element tag or name. This coded data may be identified alternatively using a different tag or a qualifier, indicator or subfield code depending on the record structure used for a message.
925	Data modification code	Code used to indicate a modification in the way a given data element is expressed.	Possible specifications include 0 translated 1 transliterated
930	Verifier	Name or identification of the person who verifies the information identifying the item.	

5 Index

The index entries include names, keywords and synonyms for data elements, data element groups and data element values (i.e. codes) listed in the directory and names, keywords and synonyms for specific messages, date types and acquisition types listed in annexes A and B. The entries are arranged in alphabetical order. The right-hand column labelled "Reference", gives the tag or annex and code (if applicable) for the indexed entity.

Entry	Reference	Entry	Reference
abbreviated name	117	biennially	324 code 9
accession number	755, 756	bill of lading	A.1 code 24
accompanying material	326	bill of lading number	005
account number	450	bill to	090 code 1
acid-free paper	329	bi-monthly	324 code 3
acknowledgement of deposit	A.1 code 18	bindery	880 code 0
acquisition for exchange	A.3 code 6	binding substitution	818
acquisitions confirmation	A.1 code 04	binding type	322
acquisition details (group identifier)	400	book rate	406 code 0
acquisitions function	080	braille	304 code 6
acquisitions number	006	British National Bibliography number	317 code 0
acquisitions priority	340		
acquisitions proposal	A.1 code 01	call number	756
acquisitions type	500, A.3	cancel additional fee	443 code 0
additional fee applied	443 code 1	cancel balance of order exceeding amount at 461	460 code 1, 461
additional missing issue(s)	B.1.6	cancel entire order	460 code 2
address (group identifier)	112	cancel request	A.1 code 10
address instruction	090	cancel response	A.1 code 11
address of institution	112	cancellation extent	827
address of publisher required	880 code 15	cancellation request	A.1 code 10
adjustment to previous credit memo	555 code 7	cancellation response	A.1 code 11
ADONIS number	316 code 4	cancelled order	555 code 2
air cargo	406 code 6		858 code 1
air mail (transportation mode)	406 code 2	cartons, number of	409
annually	324 code 5	cash on delivery	440 code 0
answer back code	123	catalogue number	316 code 3
antiquarian	A.3 code 7	catalogues searched	814
any printing or edition	817 code 3	cataloguing quantity	571
any substitution (binding)	818 code 1	cataloguing service	570
appraised value	433	cataloguing service price	429
approval order	A.3 code 0	charges, item	420
arrival notice	A.1 code 07	city	114
arrived too late	858 code 6	claim date	A.2 code 10
as requested, this subscription was cancelled on date	B.2.15	claim descriptors (group identifier)	514
author	301	claim error	545 code 12
authorizing officer	824	claim history	525
authorizing officer's signature	825	claim number	005
availability of publication	880	claim partially filled	545 code 15
available in system	813 code 0	claim reasons	535
		claim request	A.1 code 22
back issues out of print, expiration adjusted	B.2.27	claim response	A.1 code 23
back order code	886	claim responses	545
back order if not yet published	886 code 2	claim too early	545 code 13
back order if out of stock	886 code 1	claim too late	545 code 14
biblid	315	claim type	515
bibliographic level	303	claimant	080 code 2
bibliographic record identifier	317	classification number	758
bid price	426 code 0	classification scheme	757
		client	802
		cloth (binding)	322 code 1
		cloth edition out of print, paperback available	880 code 11
		C.O.D.	440 code 0
		coded (representation code)	920 code 1
		CODEN	316 code 1
		collected from customer on delivery	407 code 1
		collection	303 code 3
		combined issue	545 code 3
		combined shipment	402
		communicator's function	100
		component part	303 code 2
		composers	301

Entry	Reference	Entry	Reference
computer cassette	329	due date	A.2 code 12
computer disk	329	due recorded	880 code 1
conditional sale	A.1 code 03	duplicates	858 code 4
conference paper	323 code 1		
confirm cancellation request	828	earlier printing or edition	817 code 1
contents, entire	827 code 0	edition	305
contents, partial	827 code 1	edition in preparation	880 code 4
copies, number of	470	edition of classification scheme	759
copy number	760	editorial office	080 code 4
copy of invoice returned	439 code 2	editors	301
correspondence reference	015	educational institution price	426 code 3
country (institution)	115	electronic mail number	124
country (originator)	115	enclosed (invoice)	436 code 1
county	140	entered late	B.2.26
creators	301	entire contents	827 code 0
credit	555 code 0	error in claim information	545 code 12
credit amount	442	error on invoice	555 code 8
credit confirmation	550	exchange	A.3 code 4
credit justification	555	exchange centre	080 code 5
credit memo adjustment	555 code 7	expected date	880 code 7
credit memo date	A.2 code 02	expected shipping date	B.2.6
credit memo number	005	expedited to publisher	880 code 2
credit request	A.1 code 14	expiry date, authorization of return	A.2 code 05
credit request, reasons for	555	express prepaid	406 code 1
credit response	A.1 code 15	extended price	423
credit type	555	extra copies now discontinued	B.2.23
currency code	421		
customer	080 code 0, 404 code 0	fax number	127
customer number	131 code 0	fee cancellation code	443
		fewer missing issue(s)	B.1.8
daily	324 code 0	film	304 code 4
damaged	858 code 2	financial code	440
damaged in transit	535 code 2	firm price	426 code 5
data modification code	925	first claim	525 code 1
date	A.2, 003	FOB	404
date item(s) available	A.2 code 08	form of item (technical specifications)	329
date last issue received	A.2 code 09	free on board (FOB)	404
date of payment	A.2 code 06	frequency	324
date of publication	308	frequency changed/new frequency	545 code 4
date ordered	A.2 code 11	full processing	570 code 1
date qualifier	A.2, 751	fund identifier	445
date replacement sent	A.2 code 07		
date shipment received	A.2 code 4	gift	A.3 code 5
date subscription renewal effective	A.2 code 15	gift request	A.1 code 19
defective merchandise	555 code 6	gift response	A.1 code 20
delay in publication/date expected	545 code 2	government publication	323 code 5
delayed billing date	A.2 code 14	graphic material	304 code 11
delivery conditions (group identifier)	401		
delivery type	406	hard cover	322 code 2
deposit acknowledgement	A.1 code 18	hard cover ordered	858 code 8
deposit request	A.1 code 16	hold for pick-up	406 code 5
deposit response	A.1 code 17	host publication	303 code 3
Dewey Decimal Classification	757 code 0		
discontinued publication/last issue published	545 code 7	if out of stock, back order	886 code 1
discount	441	if not yet published, back order	886 code 2
diskette format	329	imperfect copy	535 code 3
dissertation	323 code 0	incorrect quantity received	B.1.4
distributor	404 code 2	incorrect title supplied	B.1.2
do not back order	886 code 0	incorrect volume/number/date supplied	B.1.3
do not ship before date	A.2 code 13	index included in an issue listed	B.2.25
document type	323	informant	802

Entry	Reference	Entry	Reference
information request	A.1 code 8	Library of Congress card number	317 code 1
information response	A.1 code 9	library price	426 code 2
information source	815	line item number	007
information supplied for this claim was insufficient, more information is needed	B.2.18	list price	422
inquire of	090 code 4	local processing (group identifier)	800
institution code	130	lost in transit	555 code 5
institution code type	131		
institution identification (group identifier)	110	machine-readable	304 code 6
intermediary	100 code 2	mailed when published/reorder at X amount	545 code 8
International Standard Recording Code (ISRC)	319	mailed under separate cover	436 code 2
invoice	A.1 code 21	manufacturer	404 code 3
invoice, small	443	manuscript	304 code 9
invoice cleared	876	membership	A.3 code 8
invoice copies	435	membership (invoice)	505 code 2
invoice date	A.2 code 01	membership number	130 code 1
invoice details (group identifier)	415	merchandise defective	555 code 6
invoice enclosed	436 code 1	message identification (group identifier)	001
invoice error	555 code 8	message number	005
invoice line item number	007	message type	002
invoice location	436	messages	A.1
invoice missing	515 code 3	microcomputer software version	329
invoice not received	515 code 1	microfiche	304 code 2
invoice number	005	microfilm	304 code 1
invoice number(s) on cheque stub	439 code 1	microform	304 codes 1, 2
invoice paid	878	microform acceptable	817 codes 7, 8
invoice outside package	436 code 0	microform negative acceptable	817 code 8
invoice received but items missing	515 code 2	microform positive acceptable	817 code 7
invoice total	434	monograph	303 code 0
invoice type	505	monthly	324 code 2
irregularly	324 code 8	more than one order	402 code 1
ISBN	313	moving projected recording	304 code 4
ISRC	319	multi-item indicator	010
ISSN	314	multi-media	304 code 10
issue can be purchased separately	B.2.11		
issue cannot be purchased separately	B.2.12	name, abbreviated	117
issue combined with	545 code 3	name of institution	111
issue designation	310	national bibliography number	316 code 2
issue never published due to frequency change	B.2.13	net cataloguing service price	430
issue not included in subscription period on original order	B.2.14	net price	425
issue number	310	never published	545 code 6
issue(s) not received	535 code 0	new edition in preparation	880 code 4
issue(s) not received, not wanted, extend subscription	B.1.5	no action	460 code 0
issue(s) not received this order	535 code 1	no enclosure	439
item available in system	813	no issues received this order	535 code 1
item charge (group identifier)	420	no following issue(s) received	B.1.1
item description (group identifier)	300	no longer published	545 code 7
item identification instruction	834	no record of an order, supply ordering information	B.2.17
item identification number (group identifier)	312	no record of payment, supply order number and payment information	B.2.16
item number	007	no response to previous claim	535 code 4
item(s) available date	A.2 code 08	no substitution (binding)	818 code 0
item(s) missing	515 code 2	no substitution (item)	817 code 0
item(s) received but invoice missing	515 code 3	none (cataloguing service)	570 code 0
		not available in system	813 code 1
language	334	not included in membership/subscription	B.2.24
last issue received date	A.2 code 09	not known	880 code 5
later printing or edition	817 code 2	not known (item available in system)	813 code 2
legal deposit	A.3 code 3	not known (status codes)	880 code 5
legal deposit number	005	not published	545 code 6
library (binding)	312 code 2		

Entry	Reference	Entry	Reference
not-to-exceed action	460	per your authority, publisher paid and bill sent	B.2.29
not-to-exceed amount	461	photocopy	817 code 9
not yet published	880 code 6	physical medium	304
notes/remarks	905	pictorial (representation code)	920 code 2
number of cartons	409	place of publication	307
number of copies	470	Post Office box (institution)	119
number of orders	402 code <i>n</i>	Post Office box (originator)	119
number of volumes	327	postal code (institution)	116
		postal code (originator)	116
official seal of institution	910	prepaid by vendor	407 code 0
on approval	A.3 code 0	prepaid price	426 code 4
on order from publisher	880 code 8	pre-publication offer	505 code 6
one order only	402 code 0	price change	505 code 4
order date	A.2 code 11	price qualifier	426
order duplicated	858 code 4	prices	422 to 430
order entered starting with	545 code 1	printed material	304 code 0
order number	005	printer	404 code 3
order overdue	515 code 0	province	140
order status	880	publication date	308
order was cancelled	858 code 1	publication delay	545 code 2
ordered hard cover	858 code 8	publication suspended, resumption date	
ordered paperback	858 code 7	unknown	B.2.20
orders, number of	402	publisher	306
originator's address	112	publisher's address required	880 code 15
originator's affiliation	811	purchase (acquisition type)	A.3 code 9
originator's identification (group identifier)	802	purchase authorization	826
originator's identifier	804	purchase line item number	007
originator's name	803	purchase order number	005
originator's signature	816	purchase request	A.1 code 02
originator's status	812	purchaser	080 code 0
originator's telephone number	121		404 code 0
originators (authorship)	301		
other item number	318	quantity	600, 601
other language edition	817 code 4	quantity on order does not match	
out of print	880 code 9	quantity claimed	B.2.19
out of print, cannot be replaced or reorder	B.2.8	quarterly	324 code 4
out of print/no further action	545 code 11		
out of print/subscription extended to	545 code 9	reason(s) for cancel	829
out of print temporarily	880 code 10	reason(s) for claim	535
out of print/will reprint or supply	545 code 10	reason(s) for credit request	555
out of stock	880 code 12	reason(s) for return	858
outside of package (invoice)	436 code 0	reason(s) not supplied	880
overdue order	515 code 0	recipient	100 code 1
overstock	858 code 3	reference source	815
		region	140
pagination	311	regular (invoice)	505 code 0
paper substitute	818 code 2	remainder price	426 code 1
paperback	322 code 0	remarks	905
paperback available	880 code 11	renewal subscription entered incorrectly	B.2.21
paperback ordered	858 code 7	reorder at X amount	545 code 8, 545 code 14
paperback out of print, cloth edition available	880 code 18	replacement sent	545 code 0
parcel post	406 code 3	replacement sent date	A.2 code 07
partial contents	827 code 1	report codes	888
partial processing	570 code 2	representation code	920
participant's function	080	reprinting	888 code 16
patent	323 code 3	reprinting under consideration	888 code 17
patent number	316 code 0	request cancellation	A.1 code 10
payer	080 code 3	requester	802
payment date	A.2 code 06	response(s) to claim	545
payment enclosures	439	return authorization expiry date	A.2 code 05
payment terms	440	return made	555 code 0
per your authority, publisher not paid	B.2.28		

Entry	Reference	Entry	Reference
return reasons	858	subscription	A.3 code 2
return request	A.1 code 12	subscription entered with new expiration date ..	B.2.22
return response	A.1 code 13	subscription renewal	505 code 3
return to	090 code 3	subscription renewal effective date	A.2 code 15
roll microfilm	304 code 1	subscription renewal request	A.1 code 25
routine (order)	340 code 1	subscription renewal response	A.1 code 26
rush (order)	340 code 0	substitute acceptable	817
same author	817 code 6	substitute (binding)	818
same missing issue(s)	B.1.7	substitute option	817
same subject coverage	817 code 5	supplementary (invoice)	505 code 1
SAN	131 code 2	supplements	325
second claim	525 code 2	supplier	080 code 1
semi-annually	324 code 7	system user identification	125
semi-monthly	324 code 6		
sender	100 code 0	tactile (braille, etc.)	304 code 8
sent to publisher	880 code 2	tax	432
serial	303 code 1	tax credit	555 code 9
series	321	technical specifications	329
service charge	505 code 5	technical report	323 code 2
ship best method	406 code 4	telenetwork address (group identifier)	120
shipment incomplete	535 code 5	telephone number (institution)	121
shipment refused	555 code 3	telephone number (originator)	121
shipped date, allow more time	B.2.4	telefacsimile number	127
shipped date, please recheck	B.2.3	teletex number	126
shipped when published	B.2.5	telex number	122
shipped when published, allow more time	B.2.1	temporarily out of print	880 code 10
shipped when published, please recheck	B.2.2	temporarily out of stock, on back-order, out of print, complete volume must be purchased	B.2.7
shipping and invoices charges billed to customer	407 code 3	terms of payment	440
shipping and invoice charges paid by customer on delivery	407 code 2	text (representation code)	920 code 0
shipping charge	431	thesis	323 code 0
shipping date	A.2 code 03	third claim	525 code 3
ship to	090 code 0	thirty days net	440 code 1
short shipment	555 code 4	three-dimensional object	304 code 7
signature, authorizing officer	825	time stamp	004
SISAC number	316 code 3	title	302
size of item	328	title, new	545 code 5
small invoice fee	443	title changed/new title	545 code 5
software version, microcomputer	329	title not ordered	555 code 1
sold, order cancelled	880 code 14	titles, total	600
sold out	880 code 12	to follow shortly	880 code 3
sold, will search and quote	880 code 13	too early to claim	545 code 13
sound recording	304 code 3	too early to claim, issue will be shipped when available	B.2.9
source of information	815	too late to claim	B.2.10
source of item	080 code 1	too late to claim/reorder at X amount	545 code 14
special charges and taxes	427	total titles	600
special price	426	total units	601
special supplements	325	total weight	408
specific item required	817 code 0	transaction identifiers	005
sponsoring body	915	transaction number	005
staff identification	802	transaction participant (group identifier)	050
standard address number (SAN)	130 code 2	transcription	335
standing order	A.3 code 1	translated	925 code 0
state	140	transliterated	925 code 1
status codes	880	transliteration	335
status query	A.1 code 05	transportation charge	431
status response	A.1 code 06	transportation mode	406
still projected material	304 code 12	transportation payment	407
street and number (institution)	113	type of number	316
street and number (originator)	113		

Entry	Reference	Entry	Reference
unit cataloguing service price	429	video recording	304 code 5
unit price	424	volume designation	309
units, total	601	volume number	309
Universal Decimal Classification	757 code 1	volumes, number of	327
unknown	880 code 5		
unknown (item available in system)	813 code 2	weekly	323 code 1
unspecified number of orders	402 code 0	weight, total	408
		will be published on	880 code 7
value-added tax (VAT)	437	will be shipped when published	B.2.5
VAT	437	working paper	323 code 4
vendor	080 code 1, 404 code 1	write to	090 code 2
vendor text message	905	wrong title/edition	535 code 6
verifier	930	wrong title ordered	858 code 0
		wrong title sent	858 code 5

6 Structured order of data elements

This clause provides a **structured presentation of the data elements and data element groups** listed in clause 4.

Data elements which identify information in textual form are given in preference to data elements which identify that same information in another form, for example, coded, pictorial, etc. The various forms for representing a given data value have been noted in clause 4 and are not repeated here.

The logical relationship is presented in a table consisting of three columns: ordering number, name and tag. Name and tag refer to the name and tag of a data element or a data element group as given in columns 2 and 1 of clause 4 respectively. An order number identifies a level within an hierarchical arrangement.

A dash separates each level of a multi-level ordering number as illustrated in figure 1.

01 Level one
01-01 Level two
01-01-01 Level three

NOTE — The number of levels is not limited.

Figure 1 — Ordering number convention

The structured order gives users a better overall understanding of the data elements listed in the directory (clause 4). The structured order is illustrative of relationships between data elements in this directory. It is not prescriptive.

Ordering no.	Name	Tag
01	Message identification	001
01-01	Message type	002
01-02	Date	003
01-03	Time stamp	004
01-04	Transaction number	005
01-05	Multi-item indicator	010
01-06	Correspondence reference	015
02	Transaction participant	050
02-01	Participant's function	080
02-01-01	Institution identification	110
02-01-01-01	Name of institution	111
02-01-01-02	Address of institution	112
02-01-01-02-01	Street and number	113
02-01-01-02-02	City	114
02-01-01-02-03	Country	115
02-01-01-02-04	Postal code	116
02-01-01-03	Address instruction	090
02-02	Communicator's function	100
02-02-01	Institution identification	110
02-02-01-01	Name of institution	111
02-02-01-02	Address of institution	112
02-02-02	Telenetwork address	120

Ordering no.	Name	Tag
02-02-02-01	Telephone number	121
02-02-02-01	System user identification	125
02-02-02-02	Telefacsimile number	127
02-02-03	Institution code	130
02-02-03-01	Institution code type	131
03	Item description	300
03-01	Bibliographic level	303
03-02	Physical medium	304
03-03	Author	301
03-04	Title	302
03-05	Edition	305
03-06	Volume designation	309
03-07	Issue designation	310
03-08	Frequency	324
03-09	Place of publication	307
03-10	Publisher	306
03-11	Publication date	308
03-12	Item identifier number	312
03-12-01	ISBN	313
03-12-02	ISSN	314
03-12-03	Biblid	315
03-12-04	International Standard Recording Code (ISRC)	319
03-12-05	Bibliographic record identifier	317
03-13	Acquisitions number	006
03-14	Series	321
03-15	Number of volumes	327
03-16	Pagination	311
03-17	Size of item	328
03-18	Special supplements	325
03-19	Form of item (technical specifications)	329
03-20	Language	334
03-21	Transliteration/transcription	335
03-22	Call number	756
03-23	Classification scheme	757
03-23-01	Classification number	758
03-24	Accession number	755
03-25	Accompanying material	326
03-26	Document type	323
03-27	Representation code	920
03-28	Data modification code	925
04	Local processing	800
04-01	Originator's identification	802
04-01-01	Originator's name	803
04-01-02	Originator's identifier	804
04-01-03	Originator's address	112
04-01-03-01	Street and number	113
04-01-03-02	City	114
04-01-03-03	Country	115
04-01-03-04	Region	140
04-01-03-05	Postal code	116
04-01-04	Originator's telephone number	121
04-01-05	Originator's affiliation	811
04-01-06	Originator's status	812
04-02	Item available in system	813
04-03	Catalogues searched	814
04-04	Information source	815
04-05	Verifier	930
05	Acquisition details	400
05-01	Number of copies	470
05-02	Binding type	322
05-03	Fund identifier	445
05-04	Item number	007
05-05	Item identification instruction	834
05-06	Cataloguing service	570
05-07	Cataloguing quantity	571
05-08	Acquisitions type	500

Ordering no.	Name	Tag
05-09	Authorizing officer	824
05-09-01	Authorizing officer's signature	825
05-10	Remarks	905
05-11	Total units	601
05-12	Total titles	600
05-14	Substitute acceptable	817
05-15	Purchase authorization	826
05-16	Cancellation extent	827
05-17	Confirm cancellation request	828
05-18	Reason(s) for return	858
05-19	Reason(s) to cancel	829
05-20	Status codes	880
05-21	Account number	450
05-22	Not to exceed action	460
05-23	Not to exceed amount	461
05-24	Acquisitions priority	340
06	Delivery conditions	401
06-01	Combined shipment	402
06-02	Free on board	404
06-03	Transportation mode	406
06-04	Transportation payment	407
06-05	Total weight	408
06-06	Number of cartons	409
06-07	Remarks	905
07	Claim descriptors	514
07-01	Claim type	515
07-02	Claim history	525
07-03	Reason for claim	535
07-04	Response to claim	545
07-05	Correspondence reference	015
07-06	Date	003
07-07	Date type	751
07-08	Remarks	905
08	Invoice details	415
08-01	Item charge	420
08-01-01	List price	422
08-01-02	Extended price	423
08-01-03	Unit price	424
08-01-04	Discount	441
08-01-05	Net price	425
08-01-06	Price qualifier	426
08-01-07	Special charges and taxes	427
08-01-08	Appraised value	433
08-02	Transportation charge	431
08-03	Unit cataloguing service price	429
08-04	Net cataloguing service price	430
08-05	Tax	432
08-06	Value-added tax (VAT)	437
08-07	Invoice total	434
08-08	Currency code	421
08-09	Invoice type	505
08-10	Total titles	600
08-11	Total units	601
08-12	Invoice copies	435
08-13	Invoice location	436
08-14	Payment enclosures	439
08-15	Invoice cleared	876
08-16	Invoice paid	878
08-17	Account number	450
08-18	Terms of payment	440
08-19	Small invoice fee	443
08-20	Credit amount	442
08-21	Credit information	550
08-22	Credit justification	555
08-23	Correspondence reference	015
08-24	Date	003
08-25	Date qualifier	751
08-26	Remarks	905

7 Acquisitions message matrix

Acquisition messages, comprising specific data elements, are interchanged by participants to support the acquisitions process or application. Each message has a name and a tag by which it can be identified (see A.1).

The following matrix identifies the data elements that are essential in each message to ensure that all the information required to support a given transaction is available. The individual messages are listed across the top of the matrix. The numbers 01 through 26 correspond to the code values in A.1.

Data elements that may be used for each message are listed in the left-hand column. They correspond to the data elements in clause 4 but the list is not exhaustive, merely indicative.

It is recognized that a given item of information can be transmitted by specifying a data element group or alternatively the individual data elements comprising that group. The preferred level of precision to be used for identifying data comprising the message will be specified in other International Standards which take cognizance of medium of communication (i.e. manual or mechanized) and operational requirements of the systems (i.e. paper forms, forms-filling devices, communicating word processors, on-line computer-based systems, etc.) used by institutions interchanging these messages.

The following symbols, grouped below into four categories, are used to indicate the need to provide each of the data elements within specific messages. Based on operational experience, participants in the acquisitions process will possibly find it

necessary to modify the recommended provision of data elements given in the matrix.

a) Mandatory under all conditions:

m = mandatory.

b) Mandatory under certain conditions:

C1 = mandatory if the message is mailed.

C2 = mandatory if the message is teletransmitted.

C3 = mandatory if applicable.

C4 = mandatory depending on type of item.

c) Optional:

s = local system data.

z = optional, subject to agreement, or if known.

d) 00-99 = number which identifies a specific data element value applicable to the particular data element or data element group.

All data elements from the directory have not been included in the message matrix since their inclusion would not contribute substantially to the understanding of the messages. Also, a subset is possible for use by smaller libraries.

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
001 Message identification	Acquisitions proposal	Purchase request	Conditional sale	Acquisitions confirmation	Status query	Status response	Arrival notice	Information request	Information response	Cancellation request	Cancellation response	Return request	Return response	Credit request	Credit response	Deposit request	Deposit response	Deposit acknowledgement	Gift request	Gift response	Invoice	Claim request	Claim response	Bill of lading	Subscription renewal request	Subscription renewal response
002 Message type	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
003 Date	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2
004 Timestamp	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2
005 Transaction number	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
010 Multi-item identification	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
050 Transaction participant ¹⁾	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
080 Participant's function	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
110 Institution identification	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
090 Address instruction	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
112 Address	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
100 Communication function	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
120 Telenetwork address	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2	C2
125 System user identification	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
300 Item description	m	m	m	m	m	m	m	m	m	m	m	m	m	C3	C3	m	m	m	m	m	m	m	m	m	m	m
006 Acquisitions number	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
007 Item number	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
015 Correspondence reference	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
303 Bibliographic level	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
304 Physical medium	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
301 Author	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
302 Title	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
305 Edition	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m	m
309 Volume designation	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
310 Issue designation	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
307 Place of publication	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
306 Publisher	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
308 Publication date	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
311 Pagination	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
321 Series	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
323 Document type	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
324 Frequency	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
325 Special supplements	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
326 Accompanying material	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
327 Number of volumes	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
328 Size of item	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
329 Form of item	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
334 Language	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
312 Item identification number	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4
920 Representation code	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3
925 Data modification code	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3

1) This data element group will identify at least the sender and recipient of an acquisitions transaction. The communication role may be executed by the purchaser and vendor only, in which case all transactions concerning the acquisition can be handled by two parties. However, it is possible that more than two parties need to be identified as is the case when centralized purchasing is performed on behalf of a multi-branch public library system or a regional library purchasing authority. The use of different purchasing and billing centres within a single institution will also require that this data element be repeated.

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
	Acquisitions proposal	Purchase request	Conditional sale	Acquisitions confirmation	Status query	Status response	Arrival notice	Information request	Information response	Cancellation request	Cancellation response	Return request	Return response	Credit request	Credit response	Deposit request	Deposit response	Deposit acknowledgement	Gift request	Gift response	Invoice	Claim request	Claim response	Bill of lading	Subscription renewal request	Subscription renewal response
400 Acquisition details	m	m	C3		C3	C3		C3	C3			C3	C3	C3	C3	m			C3	C3	m	m	m			
470 Number of copies		C4	C4							C3	C3	m	m	C3	C3	m					m	m	m			
322 Binding type		S	S									C4	C4								C3	C4	C4			
445 Fund identification				C3						C3		C3	C3								C3	C3	C3			
007 Item number		C3										C3	C3								C3	C3	C3			
570 Cataloguing service		C3										C3	C3								C3	C3	C3			
571 Cataloguing quantity		C3										C3	C3								C3	C3	C3			
756 Call number							C3																			
757 Classification scheme		C3																								
758 Classification number		C3																								
500 Acquisitions type	m	m	7							C3		C3	C3			3	3				C3	C3	C3			
905 Notes/Remarks	C3	C3	m				C3			C3	C3	C3	C3	C3	C3				C3		C3	C3	C3			
601 Total units		C3	C3																		C3	C3	C3			
600 Total titles		C3	C3																		C3	C3	C3			
817 Substitute acceptable	C3	C3																	C3			C3				
826 Purchase authority		S	m							C3	C3											C3				
828 Confirm cancellation		C3																								
834 Item identification instruction		C3																								
880 Status code						m																				
401 Delivery condition	S	C3	C3		C3	C3							C3								C3					
402 Combined shipment		C3	C3																							
404 Free on board (FOB)		C3																								
406 Transportation mode		C3	C3																							
407 Transportation payment		C3																								
408 Total weight																										
409 Number of cartons																										
514 Claim descriptions					C3	C3																				
003 Date			m	m	m				m	m										m						
751 Date type																										
515 Claim type																										
525 Claim history																										
535 Reason for claim																										
545 Response to claim																										
550 Credit confirmation																										
555 Credit justification																										
858 Reason(s) for return																										
829 Reason(s) to cancel																										

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
	Acquisitions proposal	Purchase request	Conditional sale	Acquisitions confirmation	Status query	Status response	Arrival notice	Information request	Information response	Cancellation request	Cancellation response	Return request	Return response	Credit request	Credit response	Deposit request	Deposit response	Deposit acknowledgement	Gift request	Gift response	Invoice	Claim request	Claim response	Bill of lading	Subscription renewal request	Subscription renewal response
415 Invoice details					C3	C3				C3	C3	C3	C3	C3	C3		C3				C3	C3	C3			
421 Currency code		C3	C3					C3	C3	C3	C3	C3	C3	C3	C3		C3				C3	C3	C3			
422 List price		C3	m	C3																	C3	C3	C3			
423 Extended price																					m	m	m			
424 Unit price																					m	m	m			
425 Net price																					m	m	m			
426 Price qualifier																					C3	C3	C3			
427 Special charges																					C3	C3	C3			
429 Unit catalogue price																					C3	C3	C3			
430 Net catalogue charge										C3		C3									C3	C3	C3			
431 Shipping			C3	C3						C3	C3	C3		C3	C3		C3				C3	C3	C3			
432 Tax														C3	C3						C3	C3	C3			
441 Discount		C3												C3	C3						C3	C3	C3			
442 Credit amount										m	m				m	m										
443 Small invoice fee																					C3					
445 Fund identification		C3	C3				C3																			
460 Exceed amount		C3	C3																							
461 Exceed action		C3																								
505 Invoice type																					m	m	m			
434 Invoice total												C3						C3			m	m	m			
435 Invoice copies		C3																			C3	C3	C3			
450 Account number		C3																			C3	C3	C3			
440 Terms of payment																					C3	C3	C3			
876 Invoice cleared																					m	m	m			
878 Invoice paid																										
800 Local processing	S	S					S																			
802 Originator's identification																										
813 Item available	C3						S																			
756 Call number							C3																			
755 Accession number							C3																			
814 Catalogues searched	S	S																								
815 Information source	S	C3	S	C3																						
824 Authorizing officer		S	m																							
825 Authorizing officer's signature		C3	C3																							
905 Remarks	C3						C3																			
930 Verifier	C3	C3	C3																							

Annex A (normative)

Selected data element values

This annex provides sample values, in coded and textual form, for a limited number of data elements identified in this part of ISO 8459. These values illustrate the information that is conveyed by particular data elements within the acquisitions application.

Descriptions or definitions are given to clarify the meaning of certain values, if necessary.

A.1 Message type (002)

Code	Name	Description
01	Acquisitions proposal	Suggestion to acquire an item(s).
02	Purchase request	Offer to purchase one or more specified item(s).
03	Conditional sale	Response to purchase request stating conditions of sale.
04	Acquisitions confirmation	Confirmation by a participant that the item acquisition conditions are accepted.
05	Status query	Request concerning the status of an acquisitions transaction.
06	Status response	Response to a status query.
07	Arrival notice	Notice sent to a client that an item suggested for acquisition has arrived.
08	Information request	Request for additional details to facilitate completion of an acquisitions transaction. Sample information queries include: issue availability, frequency of publication, continuation of a publication, first and/or last issue of a serial, acquisition type.
09	Information response	Response to an information request.
10	Cancellation request	Cancellation of an earlier request for invoice, purchase, return, credit, etc.
11	Cancellation response	Response to a cancellation request.
12	Return request	Customer's request to return an item(s).
13	Return response	Response to a return request.
14	Credit request	Request for credit to be applied to a specific item(s).
15	Credit response	Response to a credit request.
16	Deposit request	Request by a national agency for an item(s) to be supplied as required by national legal deposit regulations.
17	Deposit response	Response to a deposit request.
18	Deposit acknowledgement	Acknowledgement by a national agency of item(s) sent on legal deposit.
19	Gift request	Request by a bibliographic agency that an item or set of items be donated to its collection.
20	Gift response	Response to a gift request.
21	Invoice	Listing, sent by the supplier, of items supplied together with the prices charged for each.
22	Claim request	Customer's request for the delivery of overdue material.
23	Claim response	Response to a claim request.
24	Bill of lading	Listing, attested to by the carrier, giving full particulars of goods shipped.
25	Subscription renewal request	Request for renewal of periodical subscription.
26	Subscription renewal response	Response to a periodical subscription request.

A.2 Date qualifier (751)

Code	Name	Description
01	Invoice date	Date on which an invoice was prepared. Used to indicate the date from which late payment of invoice will be calculated, if applicable.
02	Credit memo date	Date on which a credit memo was issued.
03	Shipping date	Date on which a shipment was sent.
04	Date shipment received	Date on which the item was received.
05	Expiry date	Date after which an acquisitions transaction expires (i.e., date after which an order is invalid, an item may not be returned, or a credit requested, etc.).
06	Date of payment	Date on which payment is made for an item(s).
07	Date replacement sent	Date on which replacement for a missing or damaged item is sent.
08	Date item(s) available	Date when an item will be available for acquisition.
09	Date last issue received	Date on which the last issue of a serial publication was received.
10	Claim date	Date on which a claim for overdue material is sent.
11	Date ordered	Date on which an order is sent.
12	Due date	Date by which an invoice may be paid without penalty.
13	Do not ship before date	Date before which a shipment should not be sent.
14	Delayed billing date	An invoice date which post-dates shipment.
15	Date subscription renewal effective	Date when the renewal of a periodical subscription becomes effective.
16	Cancel date	Date on which a request for purchase, return, credit, etc. is cancelled.
17	Date returned	Date on which a customer returns an item(s).
18	Date to claim	Date on which a pre-set claim is sent.
19	Date selected	Date on which an item(s) is selected.
20	Date of status response	Date on which a status response is sent.

A.3 Acquisitions type (500)

Code	Name	Description
0	On approval	An acquisitions procedure which permits the customer to peruse item(s) before either approving their purchase or returning them to the supplier.
1	Standing order	An acquisitions procedure that authorizes a supplier for a specific period to search for and to obtain item(s) systematically for the customer.
2	Subscription	The acquisition of a serial item on a regular basis for a specified period generally for the payment in advance of a fixed sum.
3	Legal deposit	The acquisition of an item through deposit with an institution, typically a national bibliographic agency, in accordance with a nation's legal deposit laws.
4	Exchange	The acquisition of an item based on an agreement between institutions to supply item(s) to each other.
5	Gift	The presentation to an institution of an item or a set of items, often according to certain obligations, the beneficiary having the right to refuse acceptance.
6	Acquisition for exchange	The acquisition of an item with a view to its forming part, or the whole, of an exchange rather than part of the customer's collection.
7	Antiquarian	An order for delivery of an old, rare and/or valuable item when available.
8	Membership	The acquisition of an item by virtue of membership in an association.
9	Purchase	A normal purchase.

Annex B (informative)

Additional values

This annex lists additional values for two data elements which may be used in the acquisitions of serial publications. It is possible that specific dates, issue numbers, etc. have to be specified in conjunction with values for "reason(s) for claim" and "response(s) to claim".

B.1 Reason(s) for claim (535)

- B.1.1 No following issue(s) received
- B.1.2 Incorrect title supplied
- B.1.3 Incorrect volume/number/date supplied
- B.1.4 Incorrect quantity received
- B.1.5 Issue(s) not received, not wanted, extend subscription
- B.1.6 Additional missing issue(s)
- B.1.7 Same missing issue(s)
- B.1.8 Fewer missing issue(s)

B.2 Response(s) to claim (545)

- B.2.1 Shipped when published, allow more time
- B.2.2 Shipped when published, please recheck
- B.2.3 Shipped **date**, please recheck
- B.2.4 Shipped **date**, allow more time
- B.2.5 Will be shipped when published
- B.2.6 Expected shipping **date**
- B.2.7 Temporarily out of stock, on back-order, out of print, complete volume must be purchased
- B.2.8 Out of print, cannot be replaced or reorder
- B.2.9 Too early to claim, issue will be shipped when available
- B.2.10 Too late to claim
- B.2.11 Issue can be purchased separately
- B.2.12 Issue cannot be purchased separately
- B.2.13 Issue never published due to frequency change
- B.2.14 Issue not included in subscription period on original order

- B.2.15** As requested, this subscription was cancelled on **date**
- B.2.16** No record of payment, supply order number and payment information
- B.2.17** No record of an order, supply ordering information
- B.2.18** Information supplied for this claim was insufficient, more information is needed
- B.2.19** Quantity on order does not match quantity claimed
- B.2.20** Publication suspended, resumption date unknown
- B.2.21** Renewal subscription entered incorrectly
- B.2.22** Subscription entered with new expiration date
- B.2.23** Extra copies now discontinued
- B.2.24** Not included in membership/subscription
- B.2.25** Index included in an **issue** listed
- B.2.26** Entered late
- B.2.27** Back issues out of print, expiration adjusted
- B.2.28** Per your authority, publisher not paid
- B.2.29** Per your authority, publisher paid and bill sent

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