

# INTERNATIONAL STANDARD

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## Information and documentation — Bibliographic data element directory —

### Part 2 : Acquisitions applications

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

ISO 8459-2:1992

*Partie 2 : Applications aux acquisitions*

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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*.

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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.

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Tag	Name	Description	Representation and remarks
001	<b>Message identification</b>	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.	
050	<b>Transaction participant</b>	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.	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.
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.	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
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.	This data element is used to identify the following functions or roles:  0 sender 1 recipient 2 intermediary
110	<b>Institution identification</b>	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	<b>Address</b>	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.	This element may be used in conjunction with the name of institution (111) or originator's name (803).  For telenetwork addresses, see 120.
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.	May be used in conjunction with the name of institution (111) or originator's name (803).
120	<b>Telenetwork address</b>	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).	<p>Possible values are</p> <ul style="list-style-type: none"> <li>0 customer number</li> <li>1 membership number</li> <li>2 standard address number (SAN)</li> <li>3 other</li> </ul>
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.	<p>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.</p>
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. <a href="http://standards.iteh.ai/catalog/standards/sist/6a589fc8-32c4-4d29-92b2-a749aa091ac4/iso-8459-2-1992">http://standards.iteh.ai/catalog/standards/sist/6a589fc8-32c4-4d29-92b2-a749aa091ac4/iso-8459-2-1992</a>	<p>This concept includes composers, creators or originators, editors, illustrators, translators, etc. of an item.</p> <p>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.</p>
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.	<p>Possible values include</p> <ul style="list-style-type: none"> <li>0 monograph</li> <li>1 serial</li> <li>2 component part</li> <li>3 collection</li> </ul>
304	Physical medium	Word or code identifying the medium in which the item has been produced.	<p>Possible values include</p> <ul style="list-style-type: none"> <li>0 printed material</li> <li>1 roll microfilm</li> <li>2 microfiche</li> <li>3 sound recording</li> <li>4 moving projected recording</li> <li>5 video recording</li> <li>6 machine-readable</li> <li>7 three-dimensional object</li> <li>8 tactile (braille, etc.)</li> <li>9 manuscript</li> <li>10 multi-media</li> <li>11 graphic material (pictures, posters, etc.)</li> <li>12 still projected material (slide, filmstrip, etc.)</li> <li>13 other</li> </ul>



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.	
306	Publisher	Person or organization responsible for the publication of an item.	This data element may also be used for distributor or producer, if applicable.
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	<b>Item identification number</b>	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.	See ISO 2108.
314	ISSN	International standard serial number assigned to a serial title.	An ISSN may also be assigned to a monographic series. See ISO 3297.
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.	See ISO 9115.
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.	Possible values include numbers assigned by national bibliographies and other agencies, such as 0 British National Bibliography number 1 Library of Congress card number 2 other
318	Other item number	Any item identifier other than ISBN (313), ISSN (314) or biblid (315).	This data element is used in conjunction with 316 or 317.
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.	See ISO 3901.
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 or 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	<b>Acquisition details</b>	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	<b>Delivery conditions</b>	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	<b>Invoice details</b>	Group identifier for data elements 420 to 505.	
420	<b>Item charge</b>	Nature of charge associated with an item(s).	
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	<b>Claim descriptors</b>	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

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