Aleph Library – Cataloging and Data Questionnaire

Library Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Contact: Secondary Contact:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Technical Contact (the person who will create the extract): Cataloger Contact:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of in-scope monographs (bib records): \_\_\_\_\_\_\_\_\_\_\_\_\_\_

OCLC Holdings Symbol(s): \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

How many years of circulation data is available? \_\_\_\_\_\_\_\_\_

Is any in-house usage logged separately from standard ILS charges? \_\_\_\_\_\_ If yes, please explain.

Are there any other usage tallies that we should combine with standard ILS charges? \_\_\_\_\_\_ If yes, please explain.

In which MARC field is the system assigned bib record number stored? \_\_\_\_\_\_\_\_\_\_\_\_

In which MARC field is the OCLC record number stored? \_\_\_\_\_\_\_\_\_\_\_\_

**OPAC URL**

SCS creates a hot link from each title to the library’s catalog record for that title. These links appear in GreenGlass and in Excel item lists. Please offer advice about establishing the best URL and give us an active sample. Consider whether the link should be to the traditional catalog or the discovery layer, etc.

**Location Codes**

In GreenGlass, there is just one representation (one field) for location code and it has a limited number of characters. It can be used to control the scope of your queries and lists. Regardless of how location information is managed in your library’s ILS, we will work with you to ensure that it performs well GreenGlass.

How many in-scope location codes do you have? \_\_\_\_\_\_\_\_\_

Do you have more than one field which describes the location and/or collection of an item? \_\_\_\_\_\_\_\_\_\_\_

If yes, should they be combined into a concatenated location in GreenGlass? \_\_\_\_\_\_\_\_\_\_\_ Please explain.

**Classification and Call Numbers**

It is critical that SCS identify the call number that appears on the spine label of each piece. When lists of items are generated from GreenGlass, they are in (your library’s) shelf-list order. We also use your call number to derive the LC class and sub-class for each title so that subject-level parsing in GreenGlass is effective and accurate. For these reasons, it is very important for you to help us know which call number to use.

What is the primary classification scheme in your library? LC / Dewey / Other?

Is there a secondary classification scheme? LC / Dewey / Other?

*If there is a non-LC scheme in use, what part of the collection is it used for? Are non-LC materials identifiable via location code?*

If the library uses more than one cataloging scheme, is it possible to transmit with each item record, the type of call number in the item record?

Where are local (item level) call numbers stored?

If there is no call number in this location, where should we look next for the call number on the spine label?

Please establish a hierarchy of call numbers, with the best one first.

Example: *1) Item record call number; 2) 090; 3)050.*

Please describe any local data or cataloging anomalies that you are aware of.

Here are some examples:

1. *During the 2007 calendar year, the library received brief records from our vendor. Many have not been upgraded.*
2. *In 2012, when we migrated to our current ILS, a charge was added to every item.*
3. *Until about a year ago, we appended the call number with volume details.*

**DATA EXTRACT INSTRUCTIONS**

Please supply full MARC records for all monographs that will be included in the analysis – ensure that the unique bib record number is included. The project will focus on circulating print monographs, but may also include reference books, scores, special collections, etc. Check with the project manager about your project’s scope.

**Item and Usage Data**

In addition to standard bibliographic data for in-scope titles, we also need all associated item level details. The Aleph libraries we have worked with to date, have sent it via a separate delimited text file.

If you choose to send it in a delimited text file, please include the bib record number for each item - and include column labels that are easy for us to interpret.

Here is the item-level data we are looking for.  If you have any doubt about whether or not to send a particular data element, err on the side of inclusion:

* Bib Record Number (We use this to link item records to bib records.  We also use it to create permalinks to your library's OPAC.  For anyone sending item and transaction data in a separate file, please ensure that the format is the same as that found in the bib record itself.)
* Item Record Number
* Item Create Date
* Barcode
* Item Call Number
* Volume Number
* Copy Number
* Number of Pieces
* Enumeration
* Item Type Code
* Item Status Code
* Collection Code – as distinct from Location Code
* Location Code
* Location Name
* Total Charges *(all circulations)*
* In-House Uses
* Last Checkout Date
* Last Checkin Date
* Year-to-Date Charges
* Reserve Circulations

**Code Keys**

In addition to the data itself, SCS will need a list (and key to) your item location, item type, and item status codes.   For each of these code lists, let us know which ones are in-scope and out-of-scope for the project.

Are there local data anomalies or unusual cataloging practices that you think we should be aware of? If yes, please describe them.

Is there anyone in the library who has experience pulling a catalog extract like the one we need? \_\_\_\_\_\_\_\_\_\_ Should SCS seek to provide contact information for someone who can help? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thanks for the time you’ve spent on this! Once we have received this completed questionnaire, your export table map, and your item code key, we will send credentials to the SCS FTP server, for delivery of the extract.