Millennium/Sierra 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.

Do you want to combine this and/or any other usage tallies with standard ILS charges to get total Recorded Uses? \_\_\_\_\_\_ 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 item location codes do you have? \_\_\_\_\_\_\_\_\_ Please supply a list of these codes.

**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?

Some Millennium libraries have exported something called the ‘c’ tag (separately from the MARC file) which identifies the call number used for local shelf-listing. Is that necessary in this case, or can we establish a hierarchy as described below?

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**

**Item and Usage Data**

SCS expects to receive full MARC records for all monographs that will be included in the analysis. 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.

SCS also expects to receive item level data in 945 subfields of the MARC record. Here is a typical mapping of the item-level data elements exported. Note that the last checkout date (945$k) must often be added to existing export tables. Also note that a different mapping is entirely workable if all these elements are included.

945$0           out date

945$a           item call number – part one

945$b item call number – part two

945$c           volume

945$d           last reserve date

945$g           copy #

945$h           in-house uses

945$i            barcode

945$j            last check-in date

945$k           last check-out date

945$l            location

945$m          message

945$n           note

945$o           icode2

945$q           imessage

945$r            opacmsg

945$s            status

945$t            itype

945$u           total checkouts

945$v           total renewals

945$y           item record number

945$z           item created date

With regard to item data, more is always better. Include as many sub-fields as necessary to transmit all available data elements.

**Configure the Export Table:**

1. Using this or a similar mapping of 945 subfields, update the general *Export Table* (b2mtab).
2. If necessary, open a call with Innovative’s Help Desk to adjust the Export Table.
3. When table changes are completed, create a test file of records and view the results to ensure that all the requested data is present. If desired, SCS will review the test file and report back any questions or necessary adjustments.
4. Here’s how to report out the specific mapping of the export table, in a character-based system.

M > Management information  
I > Information about the system  
C > Codes used  
E > MARC export table  
1 > Default table (b2mtab)  
1 (you will see the whole table displayed)  
P > Print  
4 > E-mail

The librarian can email it to herself and then forward it to SCS.

**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.

**Build Files for Export:**

As we understand it, there are two ways to build it in Millennium: 1) build a list of ITEM records or 2) build a list of BIBLIOGRAPHIC records.  If one builds a list of ITEM records, then the exported file will have multiple instances of the corresponding bibliographic records in cases of multivolume sets/multiple copies – one for each item in the file, with a single 945 field for the specific item.  If one builds a list of BIBLIOGRAPHIC records, then the exported file will have only one copy of each bibliographic record, and those bibliographic records with multiple items attached will correspondingly have multiple 945 fields for all of the attached items (including some that may be outside the scope of the project). Please note that SCS is happy to work with either method.

1. Identify the types of material to be included. Example:
   * print-format materials located in the main and juvenile collections (usually identified via specific bibliographic locations)
   * record not suppressed - meaning that the work is active part of collection (not withdrawn)
2. Use ‘*Create Lists’* to build a list of bibliographic records

* Depending on the capacity of your library’s largest list, it may be necessary to create multiple lists/export files. This is normal, expected.
  + - Remember to begin each file’s search at the\_ next\_ bibliographic\_ record after the previous file’s last record (to avoid duplicate records)

**Transfer the Export files:**

1. Use *Data Exchange’s* “Output MARC Records to another system”
2. Select “Review” for source of records from the database (i.e., a file in Create Lists)
3. Selected one of the files built for the SCS project
4. Name the file uniquely to clearly identify that it’s for the SCS project, including library’s name and date of creation (e.g., SCS/20120711File1)
5. Use “Put FTS” to transfer the file to SCS’ server – else use FileZilla (free software) to transmit files.

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.