Voyager 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? \_\_\_\_\_\_\_\_\_

**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**

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. 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
* 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.

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. See below for some ideas about how to pull the necessary data from a Voyager system.

**Instructions for Creating the Extract from Voyager**

NOTE: This set of queries will result in you sending some extra information to SCS but that’s OK. There will be:

* Items without MFHDs or BIBs (because we exported Items even if they had been suppressed, but did not send the suppressed BIBs or MFHDs.)
* Circulation transactions with no associated items (because we exported circulation transactions for ALL Items, regardless of whether the Item was sent to SCS.)

**Preparatory Steps**

This query was done in incremental steps because running it as one big select takes too long. When the query runs too long, it gets killed overnight when Voyager and Oracle are shut down for nightly backups.

This set of queries is customized for the criteria Wesleyan wants to use for weeding, and should be modified to reflect local choices.

**1. Make a query that selects only shelving locations you wish to send to SCS. Name this query "\_SCS: Locations to send"**

You should modify this to reflect the locations you want to send.

SELECT LOCATION.LOCATION\_ID, LOCATION.LOCATION\_CODE, LOCATION.LOCATION\_NAME

FROM LOCATION

WHERE (((LOCATION.LOCATION\_NAME) In ("Location 1","Location 2","etc.")))

ORDER BY LOCATION.LOCATION\_NAME;

**2. Select the items you wish to send.**

Here we are selecting based upon the location name (the list defined in step 1 above) and item type. You should modify this to reflect the item type IDs of the item types you want to send. This writes its output to table called \_SCS: Items.

SELECT ITEM.ITEM\_ID, [\_SCS: Locations to send].LOCATION\_CODE, [\_SCS: Locations to send].LOCATION\_NAME, ITEM.PIECES, ITEM.HISTORICAL\_CHARGES, ITEM\_TYPE.ITEM\_TYPE\_NAME INTO [\_SCS: Items]

FROM (ITEM INNER JOIN [\_SCS: Locations to send] ON ITEM.PERM\_LOCATION = [\_SCS: Locations to send].LOCATION\_ID) INNER JOIN ITEM\_TYPE ON ITEM.ITEM\_TYPE\_ID = ITEM\_TYPE.ITEM\_TYPE\_ID

WHERE (((ITEM.ITEM\_TYPE\_ID)="1" Or (ITEM.ITEM\_TYPE\_ID)="2" Or (ITEM.ITEM\_TYPE\_ID)="3"))

ORDER BY ITEM.ITEM\_ID;

**3. Add in the MFHDs**

Here we are selecting unsuppressed holdings for all items selected in step 2 above. This writes its output to table called \_SCS: Items + MFHDs.

SELECT MFHD\_ITEM.MFHD\_ID, [\_SCS: Items].ITEM\_ID, [\_SCS: Items].LOCATION\_CODE, [\_SCS: Items].LOCATION\_NAME, [\_SCS: Items].PIECES, [\_SCS: Items].HISTORICAL\_CHARGES, [\_SCS: Items].ITEM\_TYPE\_NAME, MFHD\_MASTER.NORMALIZED\_CALL\_NO, MFHD\_MASTER.DISPLAY\_CALL\_NO, MFHD\_MASTER.CALL\_NO\_TYPE, MFHD\_ITEM.ITEM\_ENUM INTO [\_SCS: Items + MFHDs]

FROM [\_SCS: Items] INNER JOIN (MFHD\_ITEM INNER JOIN MFHD\_MASTER ON MFHD\_ITEM.MFHD\_ID = MFHD\_MASTER.MFHD\_ID) ON [\_SCS: Items].ITEM\_ID = MFHD\_ITEM.ITEM\_ID

WHERE (((MFHD\_MASTER.SUPPRESS\_IN\_OPAC)<>"Y"))

ORDER BY [\_SCS: Items].ITEM\_ID;

**4. Add in the Bibs**

Here we are selecting bibs for all holdings selected in step 3 above that have bib formats we are interested in weeding. You should modify this to reflect the bib\_formats you want to send. This writes its output to table called \_SCS: Items + MFHDs + BIBs.

SELECT [\_SCS: Items + MFHDs].\* AS \_SCS, BIB\_TEXT.BIB\_ID, BIB\_TEXT.NETWORK\_NUMBER, BIB\_TEXT.BIB\_FORMAT INTO [\_SCS: Items + MFHDs + BIBs]

FROM ([\_SCS: Items + MFHDs] INNER JOIN BIB\_MFHD ON [\_SCS: Items + MFHDs].MFHD\_ID = BIB\_MFHD.MFHD\_ID) INNER JOIN BIB\_TEXT ON BIB\_MFHD.BIB\_ID = BIB\_TEXT.BIB\_ID

WHERE (((BIB\_TEXT.BIB\_FORMAT) In ("aa","am","ca","cm","da","dm","ea","em","ta","tm")));

**5. Add in the Barcodes and Acquisition date**

Here we are retrieving active barcodes and acquisition dates for all items selected in step 2 above. We are doing a left join AND including barcode\_status of “Is Null” because we have some items without barcodes and want to ensure those item records without barcodes still appear in the results list. This writes its output to table called \_SCS: Final List.

SELECT [\_SCS: Items + MFHDs + BIBs].\* AS \_SCS, ITEM\_BARCODE.ITEM\_BARCODE, ITEM\_BARCODE.BARCODE\_STATUS, BIB\_ITEM.ADD\_DATE INTO [\_SCS: Final List]

FROM BIB\_ITEM INNER JOIN ([\_SCS: Items + MFHDs + BIBs] LEFT JOIN ITEM\_BARCODE ON [\_SCS: Items + MFHDs + BIBs].ITEM\_ID = ITEM\_BARCODE.ITEM\_ID) ON (BIB\_ITEM.ITEM\_ID = [\_SCS: Items + MFHDs + BIBs].ITEM\_ID) AND (BIB\_ITEM.BIB\_ID = [\_SCS: Items + MFHDs + BIBs].BIB\_ID)

WHERE (((ITEM\_BARCODE.BARCODE\_STATUS)="1" Or (ITEM\_BARCODE.BARCODE\_STATUS) Is Null));

**Export Items as delimited text file**

After running all of the above queries in the order listed (it will take some time!), export the resulting table called \_SCS: Final List as a comma-delimited text file. ***Send this file to SCS as your item records****.*

**Export MFHDs (holdings) as MARC file**

Using Excel or a favorite text editor, capture only the MFHD\_ID column from the exported Items text file. Save the MFHD\_IDs in a separate text file. Each MFHD\_ID should be on its own line in the file. Make sure there is one blank line at the end of the file.

Ftp the mfhd\_id file to your Voyager server.

Run this at the command line on the Voyager server to remove duplicate MFHD\_IDs:

sort *filename* | uniq > *filename*.uniq

(where *filename* is the name of your mfhd\_id file.)

Run marcexport to create a MARC file of all the listed records:

/m1/voyager/xxxdb/sbin/Pmarcexport –o*<full path to MFHD MARC record outputfile>* -rH -mM –t*<full path to filename.uniq created in previous step>* -i

For example:

/m1/voyager/xxxdb/sbin/Pmarcexport -o/m1/voyager/xxxdb/local/SCS/mfhds.mrc -rH -mM –t /m1/voyager/xxxdb/local/SCS/SCS\_mfhdids.txt.uniq –i

***Send the resulting MARC record output file to SCS as your MFHD (holdings) records. Be sure to ftp the file to SCS in binary mode.***

**Export Bibs as MARC file**

Use Excel or a favorite text editor to capture only the BIB\_ID column from the exported Items text file. Save the BIB\_IDs in a separate text file. Each BIB\_ID should be on its own line in the file. Make sure there is one blank line at the end of the file.

Ftp the bib\_id file to your Voyager server.

Run this at the command line on the Voyager server to remove duplicate BIB\_IDs:

sort *filename* | uniq > *filename*.uniq

(where *filename* is the name of your bib\_id file.)

Run marcexport to create a MARC file of all the listed records.

/m1/voyager/xxxdb/sbin/Pmarcexport -o*<full path to BIB MARC record outputfile>* -rB -mM -t*< full path to filename.uniq created in previous step >* -i

For example:

/m1/voyager/xxxdb/sbin/Pmarcexport -o/m1/voyager/xxxdb/local/SCS/bibs.mrc -rB -mM –t /m1/voyager/xxxdb/local/SCS/SCS\_bibids.txt.uniq –i

***Send the resulting marc record output file to SCS as your Bib records. Be sure to ftp the file to SCS in binary mode.***

### Key to marcexport parameters:

-rB = Bib records
-rH = Holdings records
-mM = based upon marc id input file
-t <filename> = location of marc id input file
-o <filename> = location of export file
-i = ignore suppressed records

Note: By default the records are exported as Unicode/UTF-8 records. Don't tell marcexport to use a character mapping (-a flag), because you want to send Unicode records.

**Export Circulation data as delimited text file**

This query is a modified version of the built-in Voyager Access query called Circulation Transactions (Charges). This is a Union query of currently active (charged out) circ transactions and past (returned) circ transactions. It has been altered to indicate the discharge date or "Still charged" if the item is still charged out to a patron.

It also pulls circulation transactions only for patron groups that reflect actual patron use. For example, we have excluded any patron groups that are for internal charges only, such as the patrons used when sending items out for binding, repair, or new books shelf. We have included *only* patron groups where charges reflect actual use of an item.

You should modify this to reflect the patron groups for whom you want to consider circulation transactions when weeding.

SELECT CIRC\_TRANS\_ARCHIVE.CIRC\_TRANSACTION\_ID, CIRC\_TRANS\_ARCHIVE.ITEM\_ID, CIRC\_TRANS\_ARCHIVE.CHARGE\_DATE, CIRC\_TRANS\_ARCHIVE.DISCHARGE\_DATE

FROM CIRC\_TRANS\_ARCHIVE

WHERE (((CIRC\_TRANS\_ARCHIVE.PATRON\_GROUP\_ID)="13" Or (CIRC\_TRANS\_ARCHIVE.PATRON\_GROUP\_ID)="15" Or (CIRC\_TRANS\_ARCHIVE.PATRON\_GROUP\_ID)="21" Or (CIRC\_TRANS\_ARCHIVE.PATRON\_GROUP\_ID)="22"));

UNION

SELECT CIRC\_TRANSACTIONS.CIRC\_TRANSACTION\_ID, CIRC\_TRANSACTIONS.ITEM\_ID, CIRC\_TRANSACTIONS.CHARGE\_DATE, "Still charged" AS DISCHARGE\_DATE

FROM CIRC\_TRANSACTIONS

WHERE (((CIRC\_TRANSACTIONS.PATRON\_GROUP\_ID)="13" Or (CIRC\_TRANSACTIONS.PATRON\_GROUP\_ID)="15" Or (CIRC\_TRANSACTIONS.PATRON\_GROUP\_ID)="21" Or (CIRC\_TRANSACTIONS.PATRON\_GROUP\_ID)="22"));

***After running the above query, export the results as a comma-delimited text file. Send this file to SCS as your circulation data.***