WMS 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.

**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.*

**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.