

Coping with Vendor Supplied Ebook & Streaming Video MARC records

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Welcome to Coping with vendor supplied ebook & streaming video MARC records. I'm Miloche Kottman, Head of Cataloging and Archival Processing at the University of Kansas Libraries.



[click]

Vendors of databases of ebooks or streaming video frequently supply free MARC records for the individual titles within the subscription. How your library obtains these records varies from vendor to vendor. If you're lucky, the vendor will make customized edits for you at no additional cost. But if they don't, you may need to edit these records yourself to improve their quality or to add local information to ensure access. Additionally, you may need to add new titles or delete records for titles you no longer have access too, or you're notified that the URLs have changed because the vendor has a new platform, etc.

I'm going to cover how we handle this workflow using MarcEdit's Task Manager, MS Access and Northwestern's Bibliographic Delete program, your mileage may vary.

Track incoming vendor records

- Database title
- Form of notification of new records
 - Email
 - Check website
- Frequency of new records
 - Complete
 - Cancelled
 - Weekly, quarterly, etc.
- Deletes
 - Included in file
 - Separately issued
 - No deletes

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Due to budget fluctuations, the number of databases we own has changed over time. In addition, vendors have different schedules for when they provide new records and they provide their records in different ways.

We use an Access database to keep track of which databases we own, how often records come in, how/if we are notified about new records and whether we also receive deleted records.

For the vendors that email when records are available, we use a shared email account to avoid cluttering up our personal mailboxes.

Keep information about how to get records

- URL or FTP address for download
- Username/password
- Special download instructions
- Date records were last downloaded
- Notes
 - For any weird things that might come up, e.g. URLs changed, PBS records deleted, name change of database, e.g. Vast = Alexander Street video
 - Serials included in file
 - Instructions for outside the norm edits

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We are using Access to keep track of this information, mainly because we created a form to make inputting data easier. A spreadsheet would work just as well.

Additional information we keep track of in the database are the URLs and FTP addresses where records are retrieved along with the usernames and passwords, special instructions or notes about the records and the status of the subscription, e.g. complete, cancelled, active.

Ebook input form

Database Title	Rand [publications]	law?	<input type="checkbox"/>	YBP	<input type="checkbox"/>
Earlier titles		Serial Solutions	<input type="checkbox"/>	Collection Set	<input type="checkbox"/>
date last load		email notification	yes		
		Access ID	56		
		Status (e.g. active)	active		

Editing Instructions:

notes	Change 856 indicators to 40! // This is not a database but rather individual publications issued by Rand. // Update file for 3-15-2012 has unique identifiers	operator ID	rand (and a few added by mw)
additions	separate files	instructions	do replace all on apostrophe, d broad dash, and {
#added +date		020	print
# records in Vger	3981 (8-29-2014)	035	mostly Sirsi nos (aprefix). OCLC nos. (o prefix) are for print
update date	roughly every 6 months	logon id	
deletes:		password	
MARC file date:	RAND MARC Records update:July to Nov. 2014 (53 records)	URL	http://www.rand.org/publicatiarc.html
noxy prefix needed	<input type="checkbox"/>	Check for MARC records:	twice yearly
		subscription/free	free

Here's a screenshot of the form. Note the special instructions for editing Rand records include replacing non-MARC characters.

Create tickler that will work for you

Check for records to download		Loaded												
ID	database title	Check for MARC records	Jan.	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
MONTHLY														
98	AccessEngineering	monthly												
70	Films on demand	monthly												
106	Kanopy	monthly												
49	OCLC Collection set (Knovel, Springer & MD Consult	monthly (OCLC)												
QUARTERLY			March			June			Sept			Dec		
3	CogNet	quarterly												
44	Credo reference	quarterly												
34	Oxford scholarship online. Philosophy	quarterly												
JANUARY & JULY			January				July							
77	Cambridge companions to music	twice yearly												
56	Rand [publications]	twice yearly												
14	Oxford reference (includes Quick reference)	twice yearly												
NOVEMBER			Month											
63	AccessPharmacy	yearly												
64	Berg fashion library	yearly (in Nov)												
40	ICPSR	yearly												
11	Literature online	yearly												
79	Sixties	yearly												
17	Women and social movements [basic]	yearly												

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For records that don't have email notifications or are so regular that you can route the email to the trash because you already know you have to load them, you can create tasks, reminders or a to-do list. I've created this single page spreadsheet which I've printed and put next to my computer.

Use MarcEdit Task Manager

- <http://marcedit.reeset.net/downloads>
 - Free MARC editing utility
- Use MarcEdit's Task Manager to automate repetitive edits
- Similar to a macro
- Anything that you can do in the MarcEditor, you can automate as a task

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Most of you probably already use MarcEdit to view and edit the records you receive. Rather than reinventing the wheel every time you get a file from a vendor, you can create a series of tasks in MarcEdit's Task Manager to automate repetitive edits. These work similar to macros where you can put several actions on a single keystroke.

Determine common edits you'll need to make to most records

- Deletes
 - Are there entire fields you want deleted?
 - Do you just want the subfield deleted?
- Additions
 - Are there entire fields you want to add?
 - Do you just need to add a subfield?
- Changes
 - Do you need to change the data in a field?
 - Do you need to change values in the Leader or 008 field?

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Before you start creating task lists, you need to determine what edits you want to make. Common actions MarcEdit can perform are Deletes, Additions, and Edits to entire fields or subfields.

Deletes per PCC's Provider-Neutral Guidelines

- 256 Computer file characteristics
- 500/550 field – Do not use for online package/provider names
- 506 Restrictions on access – Use only for records for DLF, Hathi Trust or other preservation projects
- 516 Type of computer files field – Generally do not use
- 530 Additional physical form – Generally do not use
- 533 Reproduction note – Use only for records for DLF, Hathi Trust or other preservation projects
- 534 Original version note
- 538 System details note – Use only for records for DLF, Hathi Trust or other preservation projects
- 540 Terms governing use and reproduction – Use only for digitized archival collections
- 583 Action note – Use only for records for DLF, Hathi Trust or other preservation projects
- 710 field(s) for aggregator(s) except for DLF, Hathi Trust or other preservation projects

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We reviewed the PCC's Provider-Neutral Guidelines and decided to delete the fields listed in this slide. Several of these fields have a note to use only for DLF, Hathi Trust or other preservation projects which means "not us", so we delete these fields.

Deletes per local preferences

- 050/090 call number(s) – KU doesn't put call numbers in holdings
- Subjects
 - Non-LCSH i.e. second indicator ≠ 0 (zero)
 - 655 fields
 - 020\$a ISBN if for print book only (or change to \$z)
 - 035 field if for print book (or change to \$z)
- 773 Host item entry – KU adds a local version of this field
- 300 \$c Dimensions – not relevant for eresources
- 856 \$z Public note – If you add a local version of this note
- 9xx fields – Usually contain vendor notes not needed by the institution

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We also have identified some deletes based on local practice.

For example, to prevent the call number from appearing in the holdings record, we delete the call number fields.

We use the ISBN and System Control Number fields as match points in our bulk load profile, so, we check to see if the 020 or 035 is for the print copy and if they are, we delete the field or change the \$a to \$z.

We delete the 300\$c information since it's not applicable for an electronic resource.

We want the clickable link text used to retrieve the resource to be uniform so we delete the vendor supplied 856\$z and substitute our own.

We also delete any 9xx fields supplied by the vendor. This cuts down on the tag table updates we have to do.

Add fields

- 006 and/or 007 fields
- 336-338 fields
- 59X fields – Local note fields
 - We add license information “Licensed for all KU students, faculty, and staff connecting to the Internet.” to a 599 field
- 773 Host Item Entry – If you add local version
- 655 for Electronic books or Audio or Video
- 9xx field(s) – Used to trigger creation of holdings record in batch load process

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We also use the Task Manager to add fields.

For example, if the 006 additional material characteristics field or the 007 physical description field is missing, we add them.

We also add the 336, 337 and 338 fields if they're missing. Some files will already have these fields supplied in the records while other files may have a mixture of records with the 3xx fields and some without. You can have MarcEdit only add fields if they don't already exist.

We add license information in a 599 field.

And our bulk load profile requires a 948 field with the location code to create the holdings record.

Change fields/subfields

- 300 field to: \$a 1 online resource ([pagination]).
- 856\$u – Add EZproxy prefix to URL
- 856 \$z – Add local link text
 - This note is indexed as “LINK_TEXT” and “LINK_TEXT_NORMAL” in Voyager’s ELINK_INDEX table.
 - Can use the \$z to record vendor/database information to use for easier queries to find “All of the records from xxx vendor” (i.e. instead of trying to use blob queries)
 - Sample KU text: **\$z Connect to electronic text [audio file, video, etc.]. -- (Source: XXXX)** where the source is the vendor/database title

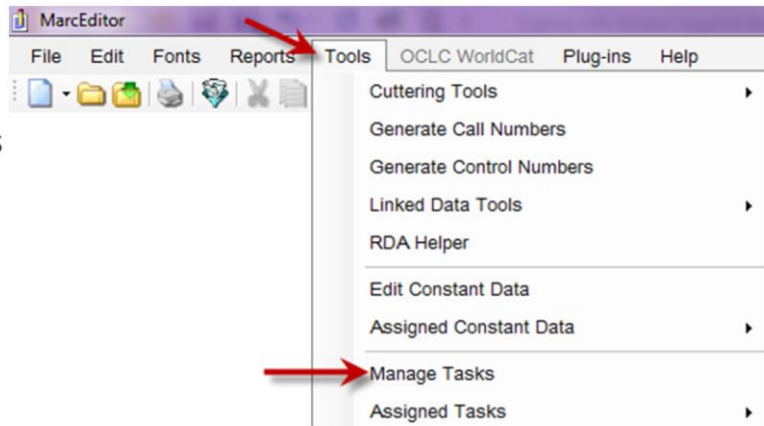
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The subfields we change are the 300 field if it doesn't already start with 1 online resource and we add the EZproxy to the front of the URL in the 856\$u.

We also add our own link text in the 856\$z. In addition to our version of the “click here” message, we include the database name in this field. The 856\$z field is the LINK_TEXT field in the ELINK_INDEX table in Access. Standardizing the \$z, allows us to search by LINK_TEXT in an Access query to find all the records from a particular vendor.

Create task lists

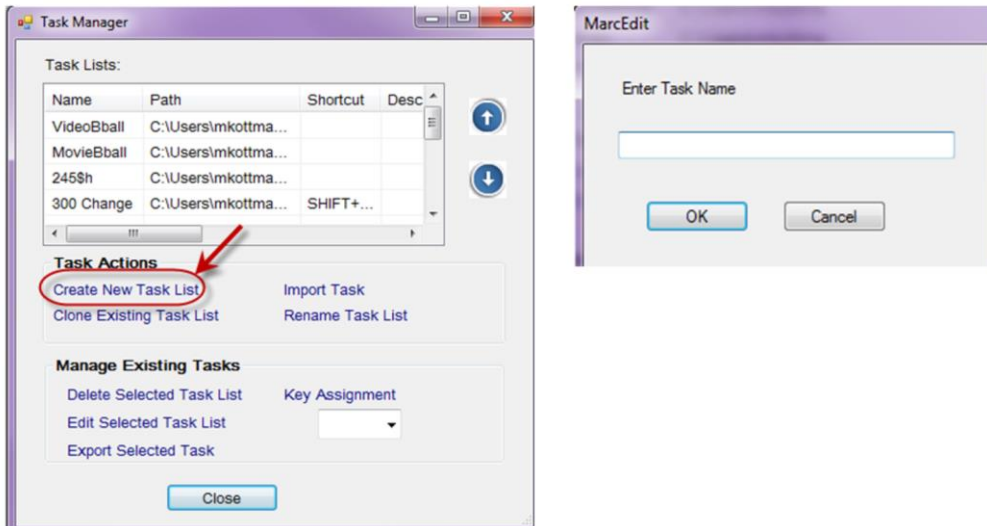
- Open MarcEdit
- Click on Tools
- Click on Manage Tasks



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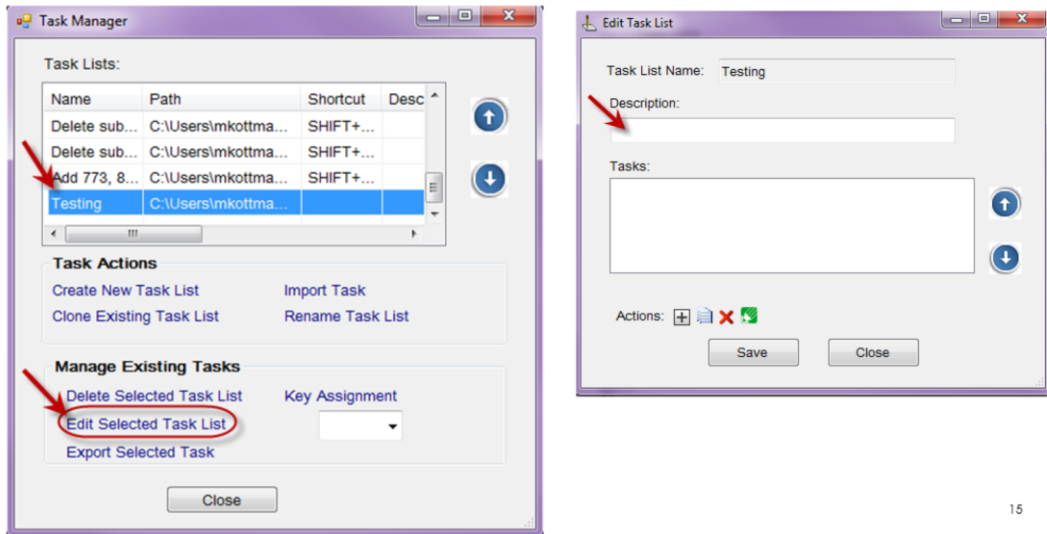
To create tasks in MarcEdit, open the editor. Then click on Tools Manage Tasks

Create New Task List



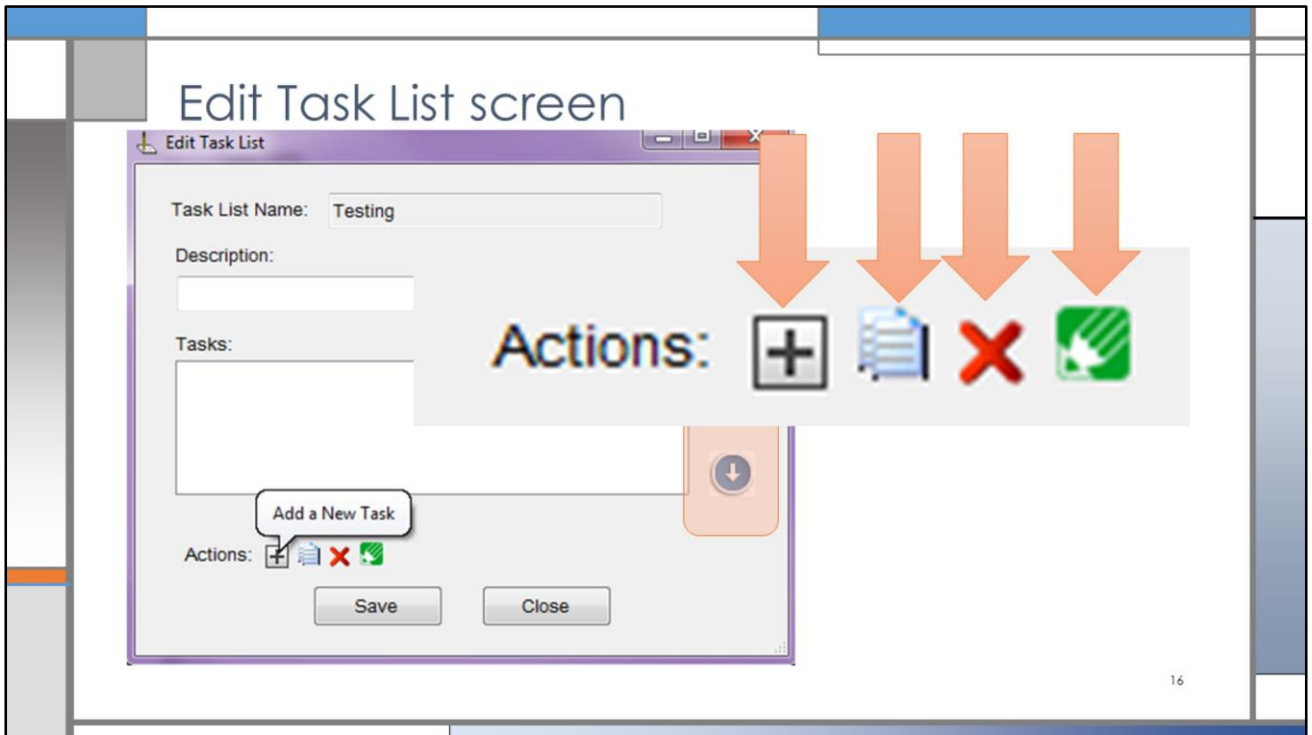
When the Task Manager window opens, click on Create New Task List and enter a descriptive name in the box that pops up. When you click on the OK button after entering the name, you will be returned to the Task Manager window.

Edit Selected Task List



Click on the name of the task list you just created and click on Edit Selected Task List.

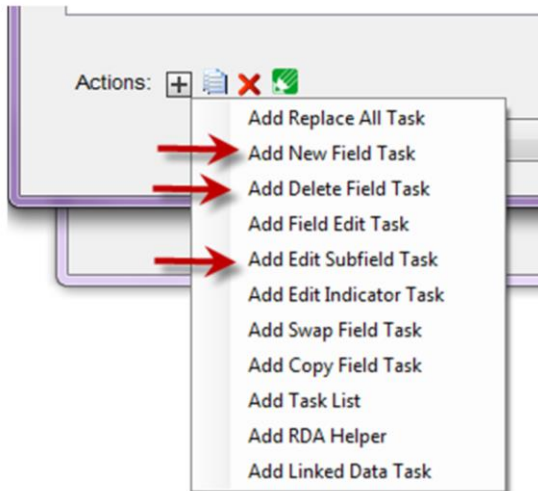
At the Edit Task List box, you can enter a fuller description for the task list is you want which will display in the rightmost column in the Task Manager window.



You will use the Edit Task List screen to create and edit your tasks. The buttons you will use to accomplish this are across the bottom.

- Use the Plus icon to Add a new task
- Use the Paper icon to Copy the selected task
- Use the X to Delete icon the selected task and use the Green thing to Edit the selected task
- You can use the Arrows in the Edit Task List window to Move tasks up or down once you have a list of tasks

Add a new task



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For brand new task lists, you will first click on the plus sign to add the new task. Depending on what you want to do, you will most likely choose Add New Field Task, Add Delete Field Task or the Add Edit Subfield task. For example, to create a task to add the EZproxy to the front of the URL in the 856u, click on Add Edit Subfield Task

Visual clue = Pink

MarcEdit.NET Batch Editing Tools

Edit Subfield

Field: Subfield: Field Data:

Replace with:

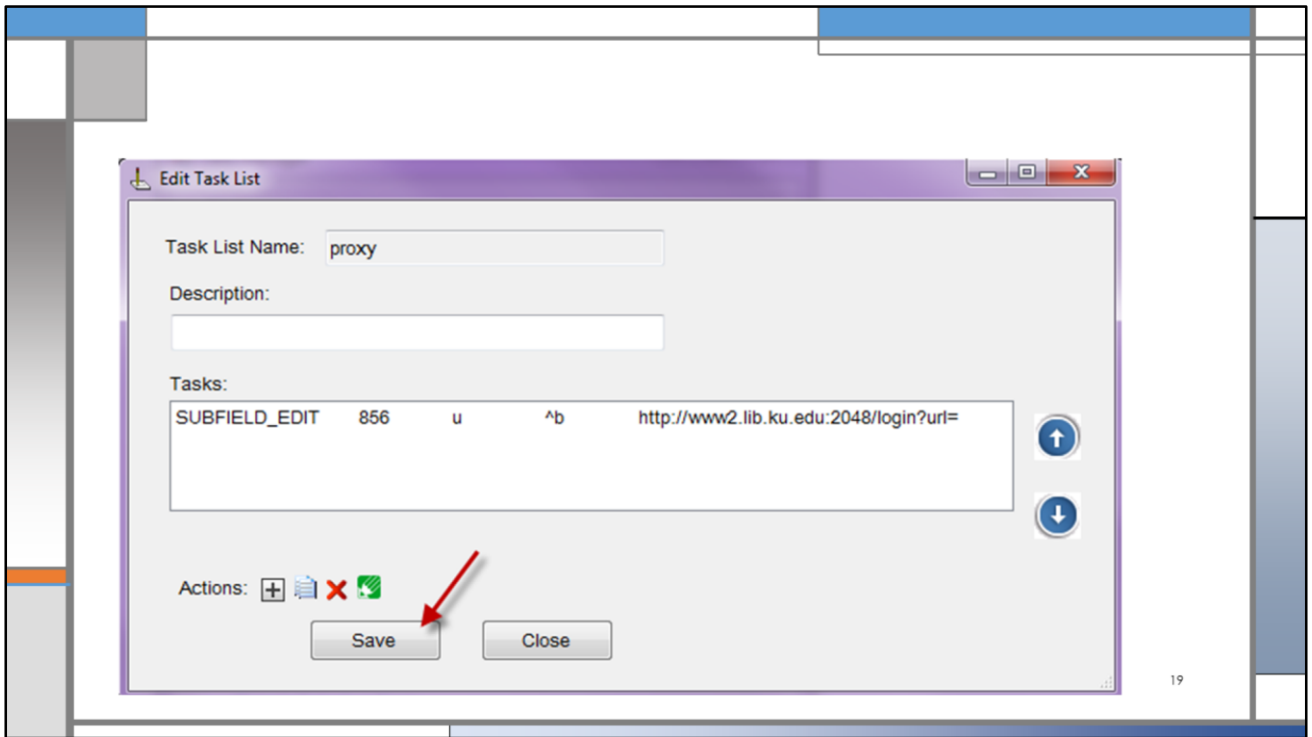
Search Options:

- New subfield only
- Add subfield if not present
- Delete Subfield
- Match case
- Move subfield data
- Use regular expression

Buttons: Replace Text, Remove Text, Close

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The functionality of the editing tools in the Task Manager are the same as in the MarcEditor however, the window is pink. So to add the EZproxy, put 856 in the Field box, u in the subfield box, and ^b in the Field Data box. The ^b tells MarcEdit to insert the text in the Replace with box at the beginning of the indicated subfield. The Replace with box has the EZproxy information that I want to insert. Click on the Replace Text button



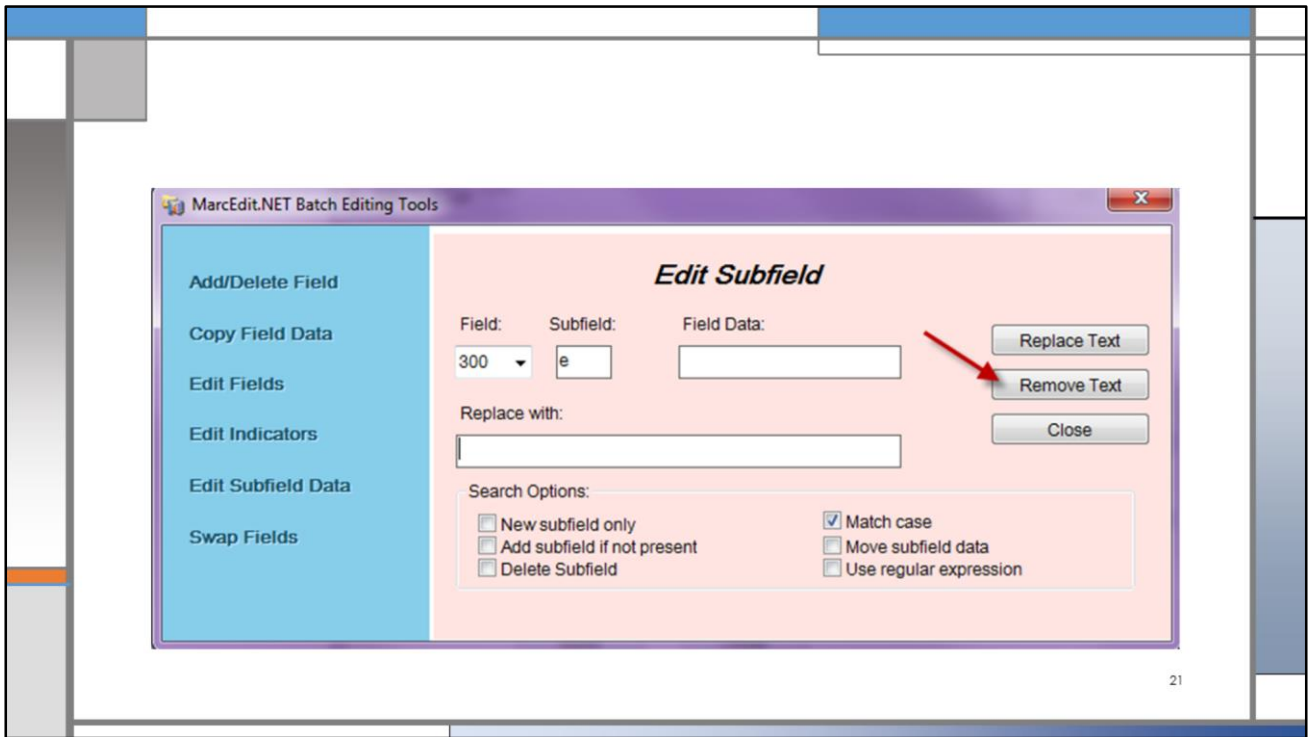
When you are returned to the Edit Task List window, you can add additional tasks or save the task by clicking on the Save button.

Task to change 300 to 1 online resource (pages)

Action	Field	Subfield	Field Data	Replace with
Subfield Remove	300	e		
Subfield Remove	300	c		
Subfield Edit	300	b	; (semicolon)	Blank
Subfield Edit	300	a	; (semicolon)	Blank
Subfield Edit	300	a	^e) (right parenthesis)
Subfield Edit	300	a	:) (colon right parenthesis)): (right parenthesis colon)
Subfield Edit	300	a	^b	1 online resource (

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A more complex example of a task list would be changing the 300\$a to 1 online resource followed by the pagination in parenthesis. I've put the seven tasks needed to accomplish this in this table. In the first task, the Action of "Subfield Remove" means use the Add Edit Subfield task and click on the Remove Text button. In the Field box put "300" and in the subfield box enter "u". Leave the Field Data and Replace with boxes blank.



Here's what it would look like

Task to change 300 to 1 online resource (pages) -- more

Action	Field	Subfield	Field Data	Replace with
Subfield Remove	300	e		
Subfield Remove	300	c		
Subfield Edit	300	b	; (semicolon)	Blank
Subfield Edit	300	a	; (semicolon)	Blank
Subfield Edit	300	a	^e) (right parenthesis)
Subfield Edit	300	a	:) (colon right parenthesis)): (right parenthesis colon)
Subfield Edit	300	a	^b	1 online resource (

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[click] Do the same for subfield c.

The action in the remaining tasks is "Subfield Edit" which means use the "Add Edit Subfield" task and click on the "Replace Text" box. For the third task, put 300 in the "Field" box, "b" in the subfield box and semicolon in the "Field Data" box. Leave the "Replace with" box blank. The next task is the same only it will remove the semicolon from the subfield a.

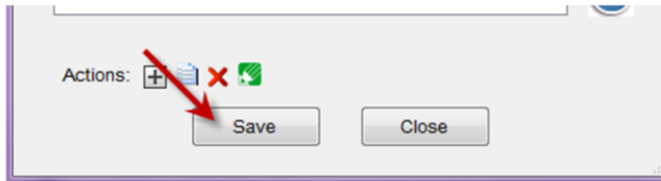
The ^e in the next task tells MarcEdit to add the information in the Replace with box to the end of the subfield, in this case a closing parenthesis at the end of the subfield a.

The next task changes colon closing parenthesis to close parenthesis colon.

The final task inserts "1 online resource opening parenthesis" to the beginning of the subfield a.

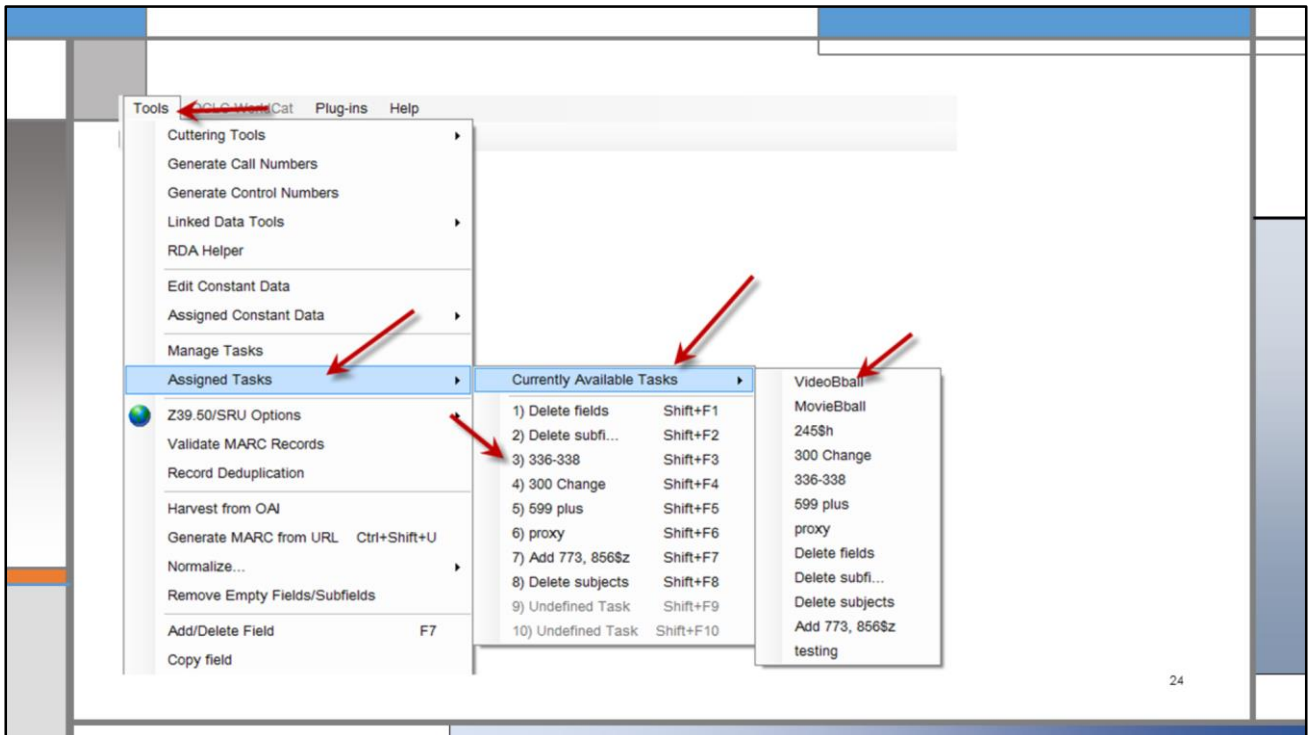
[click] This is what it will look like in the Edit Task List box.

Saving and creating Keyboard Shortcut

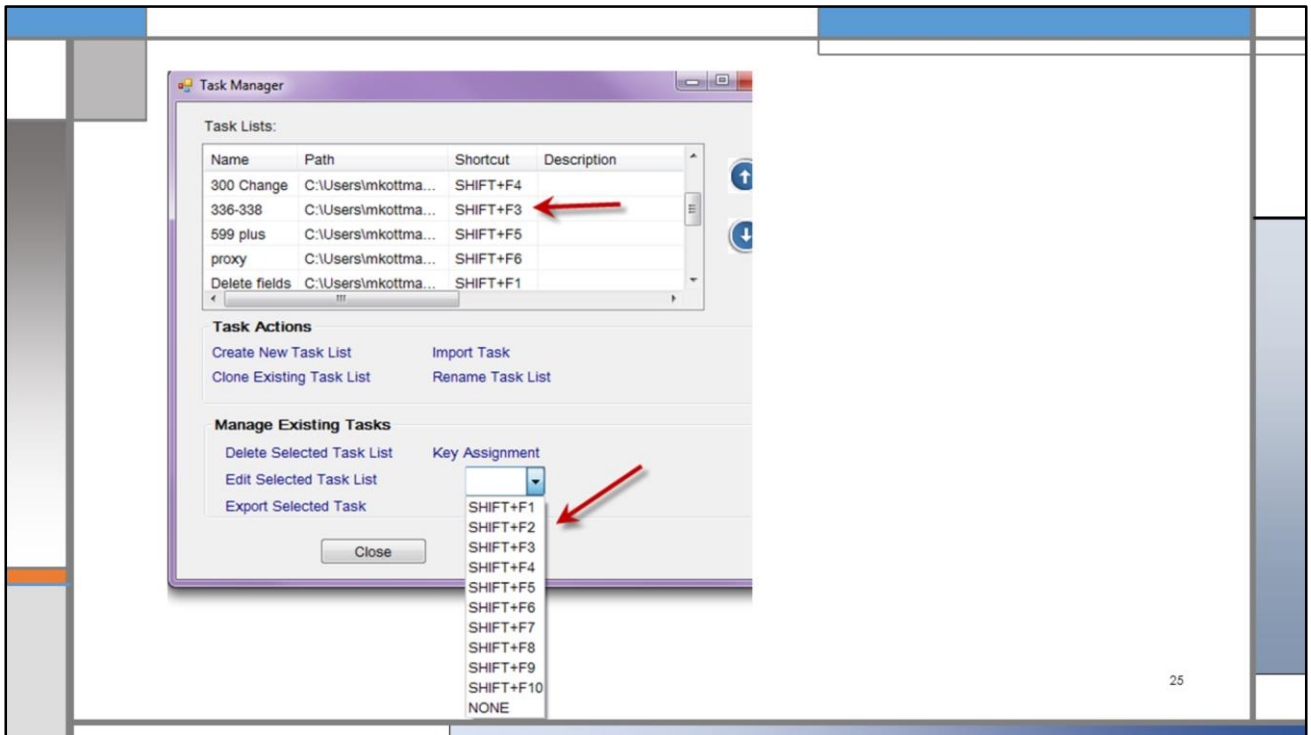


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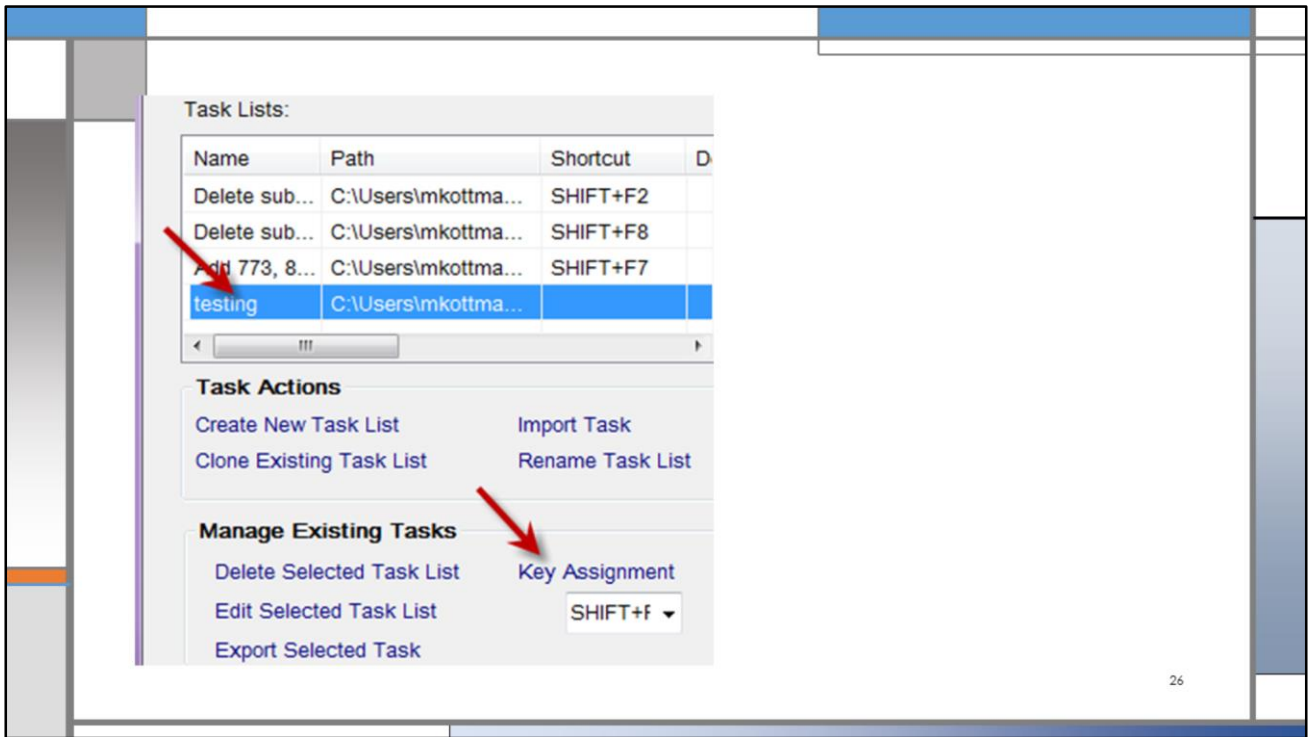
When you've completed creating a list of tasks, click on the Save button. This will return you to the Task Manager window. Now that you've created a task list, how do you launch it?
[click]



In the MarcEditor, click on Tools => Assigned Tasks. If you've assigned any tasks to a keyboard shortcut, they'll display in a numbered list. A list of all your tasks, including those not assigned to a keyboard shortcut, can be accessed by opening the Currently Available Tasks flyout.



To assign a keyboard shortcut to a task, at the Task Manager window, select an unused Key Assignment from the dropdown window.



Then click on the name of the task you want to assign the shortcut to, and click on the words "Key Assignment".

Tips for creating task lists

- It's ok to have a task that deletes a field that doesn't exist in the record.
- Break tasks into multiple Task Lists instead of one huge task
 - Helps with trouble-shooting if you run into problems
 - Not all tasks need to be performed on all records, e.g. vendor may already have added 33x fields
- After a task list is complete, verify it's what you wanted and then save the file.
 - If edits were made that you didn't want, just close MarcEdit and answer NO when asked if you want to save your edits.

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MarcEdit doesn't care if you ask it to delete fields or subfields that don't exist, it'll just report that there weren't any changes made, so it is okay to string all of your delete fields into a single task.

Break tasks into multiple Task Lists instead of one huge task. This helps when troubleshooting your tasks lists and provides a chance to check over the records to see if there are additional things that need to be fixed.

Check over the edits made after each task. If you are satisfied with the edits, save the file. If the edits are incorrect, just close MarcEdit without saving it to revert the file back to your last successful save, i.e. when you open the file back up, the changes you just made will be gone.

You will likely still need to make manual edits

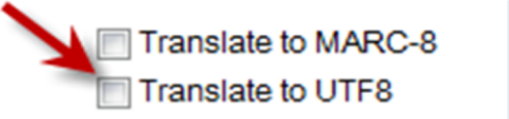
- To edit the “weird” stuff you find when examining the records
- To delete 500/550 for online package/providers
- To delete 710 for aggregator(s)
- You can create a task list that adds an 856 \$z with a word that will likely never appear in the records, e.g. Source: FullMetalAlchemist, and then do a “Replace” to change it to the appropriate vendor/database name

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You’ll still find occasions to use the regular tools in MarcEdit to make edits that may only apply to a particular record set. For example, the Rand records use non-utf8 characters for the apostrophe, dashes, ellipses, etc. I usually use the Find/Replace function in the MarcEditor to fix these errors.

You can also use a combination of a generic task that applies to all records and manual edits to make the change specific for the record set. For example, the task I use to update the 856\$z and add the 773 field uses the word “FullMetalAlchemist” for the database title. After running all the other common tasks to update the record, I then do a find/replace on “FullMetalAlchemist” to update the database title.

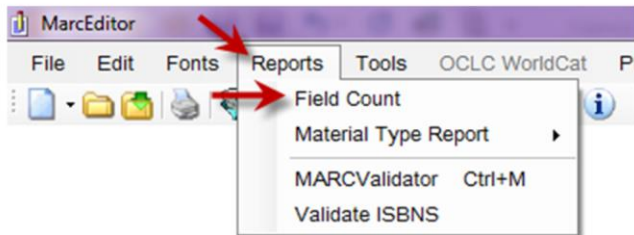
Unicode vs. MarcEdit

- Leader position 09
 - Blank = MARC-8
 - a = Unicode
 - Recommend selecting the breaking the file of records
 - Easier to read – no annoying curly braces in the middle of words
Rene{acute}e
 - MARC-8 occasionally introduces weird diacritics if you are also splitting files
- 

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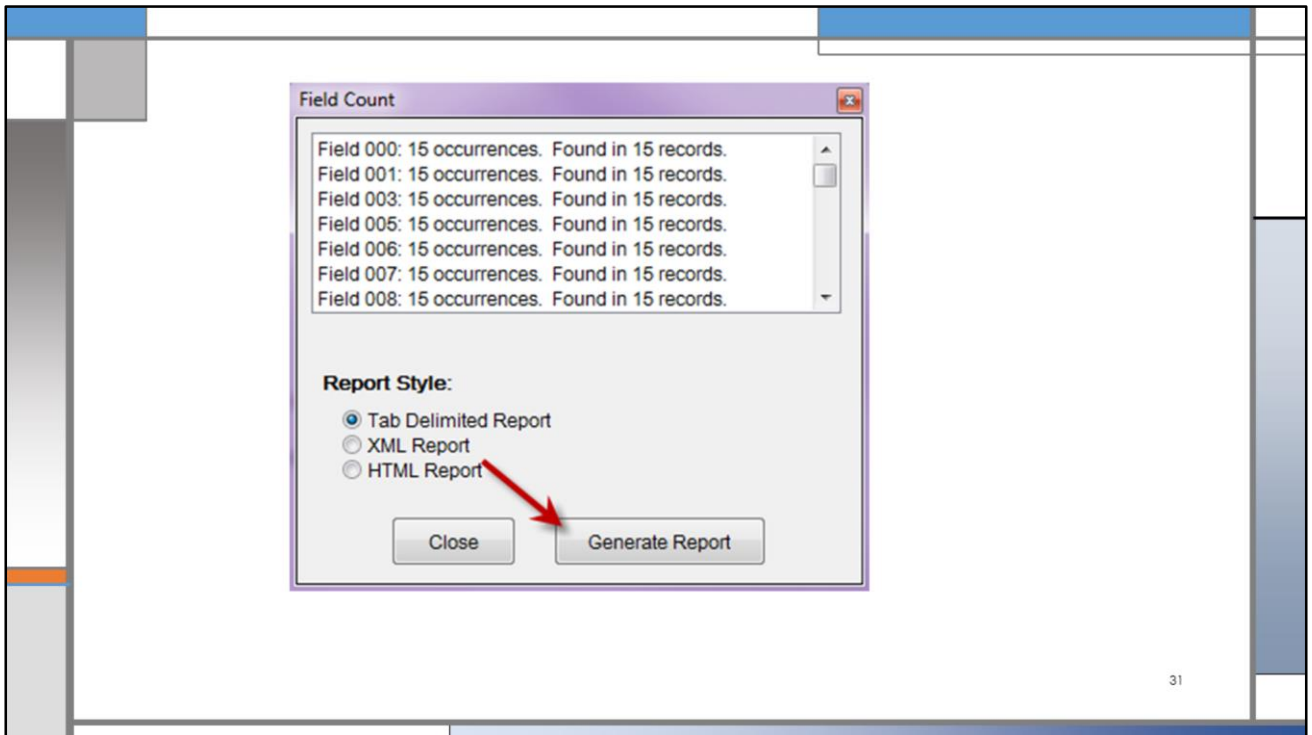
The files you receive may or may not be utf8. I always click the “Translate to UTF8” box when breaking the records for editing because we get a lot of records for non-English titles. Using utf8 makes the records easier to read. Instead of the curly braces around the word for the diacritic, you’ll actually see the diacritic mark. This also allows us to use a single bulk load profile instead of multiple profiles to account for Unicode or not Unicode records. In addition, MarcEdit used to get squirrely if you split and edited files of non-Unicode records. So, better safe than sorry.

Tips for examining records



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No one has the time to do a quality check on every single record but there are a couple of things you can do to improve the quality. Delete unnecessary fields – If the field isn't really necessary for discovery, you can avoid displaying inaccurate information or typos by just deleting the field. For example, we received a Chinese database which had a mixture of a small number of real LC subject headings and a whole bunch of I-have-no-idea-what-they-were headings coded as LC subjects. We decided to get rid of all the subject headings prior to loading the file and will rely on the 505 fields for retrieval instead. Another thing you can do is check for incorrect MARC tagging using MarcEdit's Report function. In the MarcEditor, click on Reports => Field Count.



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This window will tell you how many times a MARC tag is used in the record. To get information about the subfields, click on Generate Report.

Field	Subfield	In Records	Total
000		42	42
001		42	42
003		42	42
005		42	42
006		42	42
007		42	42
008		42	42
010		26	26
016	\$z	19	19
	\$2		19
	\$z		19
020		42	130
	\$q		130
	\$a		42
	\$z		88
035		42	126
	\$a		126
040		42	42
	\$b		42
	\$c		42
	\$a		42
	\$d		42
	\$e		42
043		8	8
	\$a		10
100		15	15
	\$d		6
	\$e		15
	\$a		15
---	--	--	--

This will create a text file that lists all the tags and subfields in the records. You can use this to find obsolete/invalid MARC tags and incorrect subfields. It's a good idea to check the Notes fields for usage of the dollar sign. MarcEdit considers the dollar sign to be a subfield but sometimes it's supposed to be a real dollar sign. So look for things like \$1 being used as a subfield in the 505 field. To fix this, change the dollar sign to the word "dollar" enclosed in curly braces.

Deleted records

- Separate file
- Mixed in with additions
- Spreadsheet of “number” and titles to delete
- “New” file of everything each time, expectation is to delete what you have and re-load
- Cancellation of subscription and you need to delete all records from the package

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Vendors notify you of which records to delete in several different ways. Some send a separate MARC file of the records that should be deleted while others include the deletes in the same file as the adds. From EBL, we receive a spreadsheet of titles to delete. The most time consuming is when a vendor expects you to delete all existing records and just load their new file. And the most fun is when the entire subscription has been cancelled and you get to delete the records forever.

Separate file

=LDR 01250ngm a2200325 i 4500

=001 kan1112921

=003 UtOrBLW

=005 20140324125357.0

Tag	I1	I2	Subfield Data
028	5	2	‡a 1112921 ‡b Kanopy
035			‡a (UtOrBLW)kan1112921
040			‡a UtOrBLW ‡b eng ‡c UtOrBLW ‡e rda

003 field + 001 field = 035 field

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If you receive a separate file of records to delete AND the records contain an 001 and 003 field that when concatenated match the 035 field in your Voyager records,

Use Bibliographic Delete program from Northwestern at:
<http://www.library.northwestern.edu/public>

Bib delete/suppress program
Exit Perform Options

Name of the input file:
C:\Users\mkoltman\Documents_Strawn\BibDelete\DeleteRecords\cognet_20 Browse

What's in the input file?

- Bibliographic record numbers
- Item barcodes
- MARC records: convert 001 and 003 into 035 and match against Voyager records
- MARC records: 001 contains Voyager bib record number

Rather than use a file of record numbers, perform the indicated action for everything in the single owning library listed on the Options panel

Action to perform

- Delete bibs, holdings and items
- Suppress/unsuppress bibs and holdings
- Suppress/unsuppress bib only

Production run

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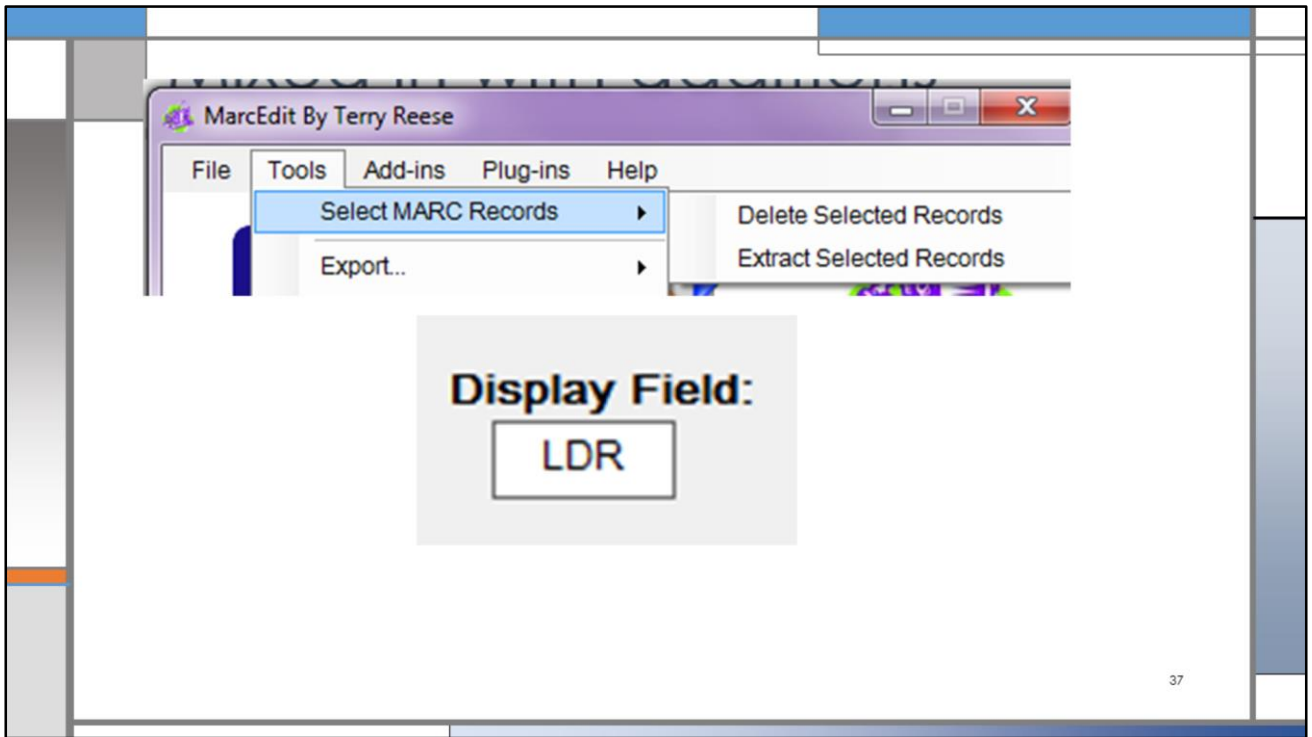
You can use Northwestern's Bibliographic Delete program to delete the records if you use Voyager. In the Bib delete program, select the option that converts the 001 and 003 field into an 035 field and compares it against Voyager records.

Mixed in with additions

- The Leader/05 position should be "d" for Deleted record
- So that you don't waste time editing records that are just going to be deleted, use MarcEdit to separate these records from your file.
 - Tools => Select MARC Records => Extract Selected Records
 - Change Display Field: box to LDR and do a search for "d"

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If your files has a mixture of additions and deletions, you can use the Select MARC Records tool in MarcEdit to create a separate file of the deletes and then use Northwestern's Bib Delete program to delete the records.



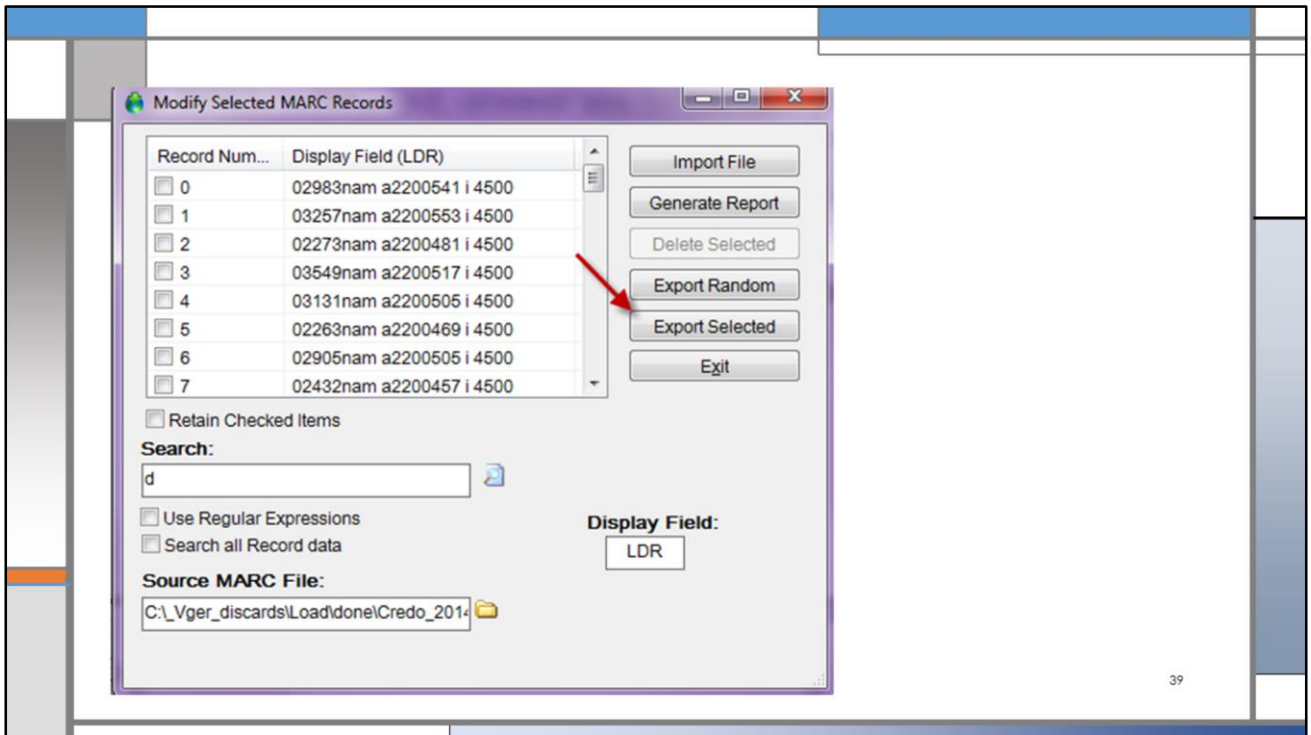
At the main display in MarcEdit, click on Tools => Select MARC Records
=> Extract Selected Records.
In the Modify Selected MARC Records box that pops up, change the
Display Field box to LDR for leader and then import your file of records.

Mixed in - continued

- When prompted, answer yes to the question "Would you like to delete the extracted records from the source file?"
- Edit the source file that no longer has the records that need to be deleted
- Use Northwestern's Bibliographic Delete program to delete the records flagged for deletion

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When the records have been imported, type "d" in the search box and click search. This will select all of the records that are coded as deletes. Click on the Export Selected button.



When prompted answer Yes to the question "would you like to delete the extracted records from the source file?"
You can edit the now "deleted records free" source file and load the additions and then use Northwestern's Bib Delete program to delete the file of deletes

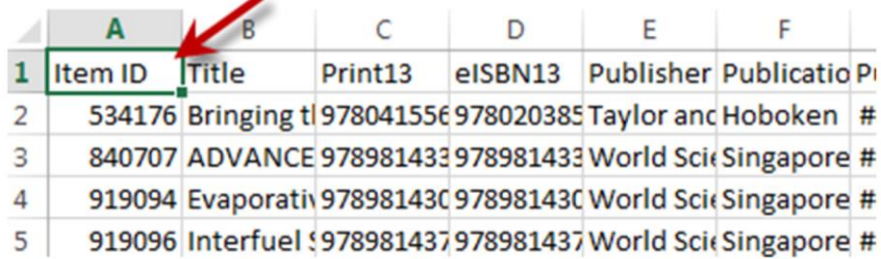
Spreadsheet of numbers and titles

- Vendors are getting much better at supplying unique System Control Numbers (035 field)
 - Voyager creates an 035 field by combining the 001 and 003 fields
- EBL and Ebrary usually send an email with a link to download a zip file that contains a spreadsheet and a file of MARC records of the records to delete
 - The Item ID is equivalent to the 001 field
 - The 003 field for EBL materials is EBL
 - The 003 for Ebrary is ebr
 - Create a new column that concatenates EBL or ebr with the Item ID number: ="EBL"&B2

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EBL and Ebrary send a zip file that contains a spreadsheet and file of records to delete. The spreadsheet includes the unique Item ID for the item, the title, ISBN, and other information. The Item ID is the same as the 001 field that was in the record when it was loaded into the catalog. The 003 field for EBL materials is EBL and the 003 for Ebrary materials is ebr.

Spreadsheet



	A	B	C	D	E	F
1	Item ID	Title	Print13	eISBN13	Publisher	Publicatio Pi
2	534176	Bringing tl	978041556	978020385	Taylor anc	Hoboken #
3	840707	ADVANCE	978981433	978981433	World Sci	Singapore #
4	919094	Evaporati	978981430	978981430	World Sci	Singapore #
5	919096	Interfuel	978981437	978981437	World Sci	Singapore #

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As I mentioned earlier, Voyager concatenates the 001 and 003 fields to create the 035 field when records are loaded into Voyager. You can re-create this field in the spreadsheet

The screenshot shows an Excel spreadsheet with a formula bar at the top displaying the formula `=\"EBL\"&B3`. Below the formula bar is a table with the following data:

A	B	C	D	E
035 field	Item ID	Title	Print13	eISBN
EBL534176	534176	Bringing t	978041556	97804
EBL840707	840707	ADVANCE	978981433	97898
EBL919094	919094	Evaporati	978981430	97898

The formula bar also includes a dropdown menu, a colon separator, and buttons for canceling (X), confirming (checkmark), and entering a formula (fx).

By adding a column and plugging in the formula “EBL”&[ItemID column].

=LDR 00581dam a22001813u 4500

=001 EBL1730178

=003 AU-PeEL

=005 20150402144110.0

=006 m|||||d|||||

=007 cr-n-----

=020 \\\$a9789814579636

=035 \\\$aEBL1730178

=035 \\\$a(OCOLC)883570491

=040 \\\$aAU-PeEL\$beng\$cAU-PeEL\$dAU-PeEL

=245 10\$aAdvances in Digital Handwritten Signature Processing\$h[electronic resource].

=260 \\\$aSingapore{09} :\$bWorld Scientific Publishing Company,

=655 \0\$aElectronic books.

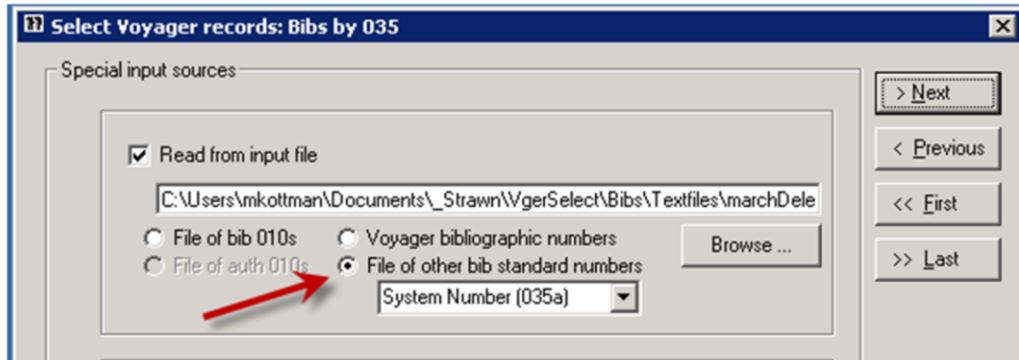
=856 40\$zClick here to view book\$uhttp://KU.ebib.com/patron/FullRecord.aspx?p=1730178

035 field = (AU-PeEL)EBL1730178

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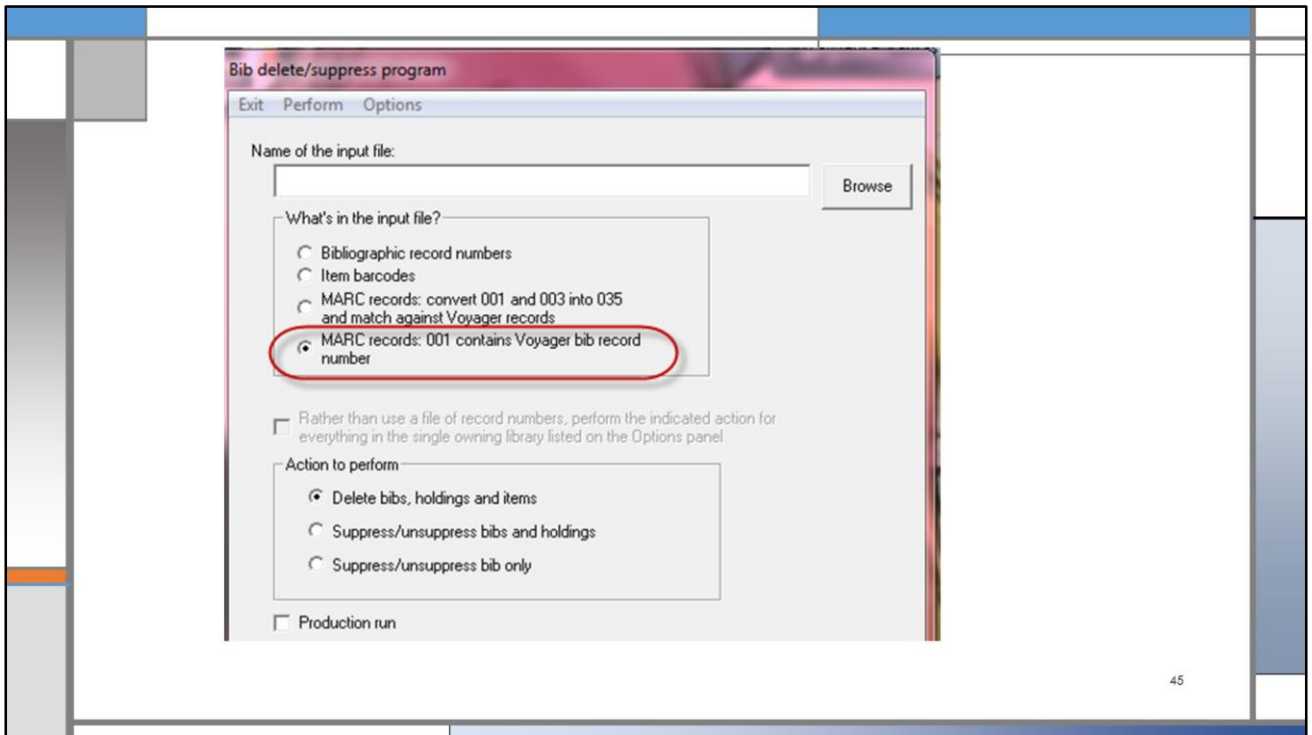
Though it would be great if you could use the MARC file of records EBL sends to delete the records, you can't because the 003 has been changed to AU-PeEL and the 001 field has the EBL already attached. If loaded, these records would have an 035 of (AU-PeEL)EBL1730178

Use VgerSelect



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Copy the 035 column you created from the spreadsheet and paste into a text file. You will need to delete the column header before saving. Use Northwestern's VgerSelect program (or Voyager's GDC) to retrieve a file of MARC records based on the 035 field. In VgerSelect you would click through the screens until you got to the "Special input sources" screen at which you would enter the location of the text file and select "File of other bib standard numbers" and choose System Number (035a).



Your output should be a file of MARC records where the 001 field is the Voyager bib ID. Now you can use BibDelete with "MARC records: 001 contains Voyager bib record number" selected to delete the records.

New file of all records every time

- What a pain!!!
- Check to see if System Control Numbers (035 and/or 001/003) are the same
 - Some vendors give everything a new number
 - Some vendors don't have control numbers at all
- If 035 is not consistent, check to see if the 856u is the same on matching records

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Some vendors can't or won't supply you with the new records since the last time you loaded. Instead they give you an entirely new file every time. If this only happens once a year, it's manageable but if it's more frequent it can be very time consuming.

To determine how you want to handle this type of file load, check to see if the vendor actually uses the system control number correctly. If the vendor uses the same 035 as the print record, you won't want to delete records based on 035 because you may end up deleting the record for your print copy. Another situation I've encountered are vendors who find a system number they like and put it in every single record or they change the numbers every time there's a new file.

If there isn't a usable 035 field, you can use the 856u as a match point if necessary, as long as the URL's haven't been changed too.

Neither the 035 field nor the 856\$u is the same or the subscription has been cancelled

- If there are no matching fields, you'll need to delete all the records for that database and then re-import
- If you put the vendor/database information in the 856\$z you can run an Access query to retrieve the Voyager bib IDs for all records with the vendor name/database name in the link text (856\$z) and then use Northwestern's Bib Delete program to delete all the bib records.

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If there isn't a usable 035 field or 856\$u field, you will have to do as the vendor recommends and delete all that vendor's records in your catalog and add the new file. You can also do this even if you have matching 035 or 856\$u fields. It's mainly a matter of personal preference. We try not to use this method because we've already done authority maintenance on the headings and don't want to have to re-edit all the incorrect/out-of-date headings.

If you included a unique 856\$z for the vendor in each record in the file set, an access query can easily be created to find all of the records that will need to be deleted. We don't rely on operator IDs because some records may have been loaded individually instead of a bulk loaded.

Find existing records in Voyager

KU--Elink text search for databases

ELINK_INDEX

- * ELINK_ID
- RECORD_TYPE
- RECORD_ID
- SEQN
- LINK_
- LINK
- LINK_

Field:	RECORD_ID	LINK	LINK_TEXT	LINK_TEXT_NORMAL
Table:	ELINK_INDEX	ELINK_INDEX	ELINK_INDEX	ELINK_INDEX
Total:	Group By	Group By	Group By	Group By
Sort:				
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:			Like **Oxford referen	
or:				

Use the ELINK_INDEX table. The Record ID is the Voyager bib, authority or holdings record ID. You'll also need to include the LINK_TEXT and/or LINK_TEXT_NORMAL field in your query. The Criteria line will be vendor/database title enclosed in asterisks.

KU--Elink text search for databases

ELINK_INDEX

- ELINK_ID
- RECORD_TYPE
- RECORD_ID
- SEQNUM
- LINK_TYPE
- LINK
- LINK_TEXT

BIB_HISTORY

- BIB_ID
- OPERATOR_ID
- ACTION_DATE
- LOCATION_ID
- ENCODING_LEVEL
- SUPPRESS_IN_OP
- ACTION_TYPE_ID

Field:	RECORD_ID	LINK	LINK_TEXT	LINK_TEXT_NORMAL	OPERATOR_ID	ACTION_TYPE_ID	
Table:	ELINK_INDEX	ELINK_INDEX	ELINK_INDEX	ELINK_INDEX	BIB_HISTORY	BIB_HISTORY	
Total:	Last	Group By	Group By	Group By	Group By	Group By	
Sort:							
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Criteria:			Like "Oxford referen			1"	
or:							

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You can ensure you only retrieve bib records in your query by adding one of the BIB tables. You'll have to manually join the Record_ID to the Bib_ID field. I usually use the BIB_HISTORY table so that I can retrieve the Create operator ID

LastOfRECOI	LINK	LINK_TEXT	LINK_TEXT_NO	OPERATOR_	ACTION_TYP
8071126	http://www2.l	Oxford reference Co	OXFORD REFEREN	oxref	1
8071129	http://www2.l	Oxford reference Co	OXFORD REFEREN	oxref	1
7984903	http://www2.l	Connect to electron	CONNECT TO ELE	oxref	1
7984905	http://www2.l	Connect to electron	CONNECT TO ELE	oxref	1
7984907	http://www2.l	Connect to electron	CONNECT TO ELE	oxref	1
7984909	http://www2.l	Connect to electron	CONNECT TO ELE	oxref	1
7760017	http://www2.l	Connect to electron	CONNECT TO ELE	mwilson	1
7833529	http://www2.l	Connect to electron	CONNECT TO ELE	oxford	1

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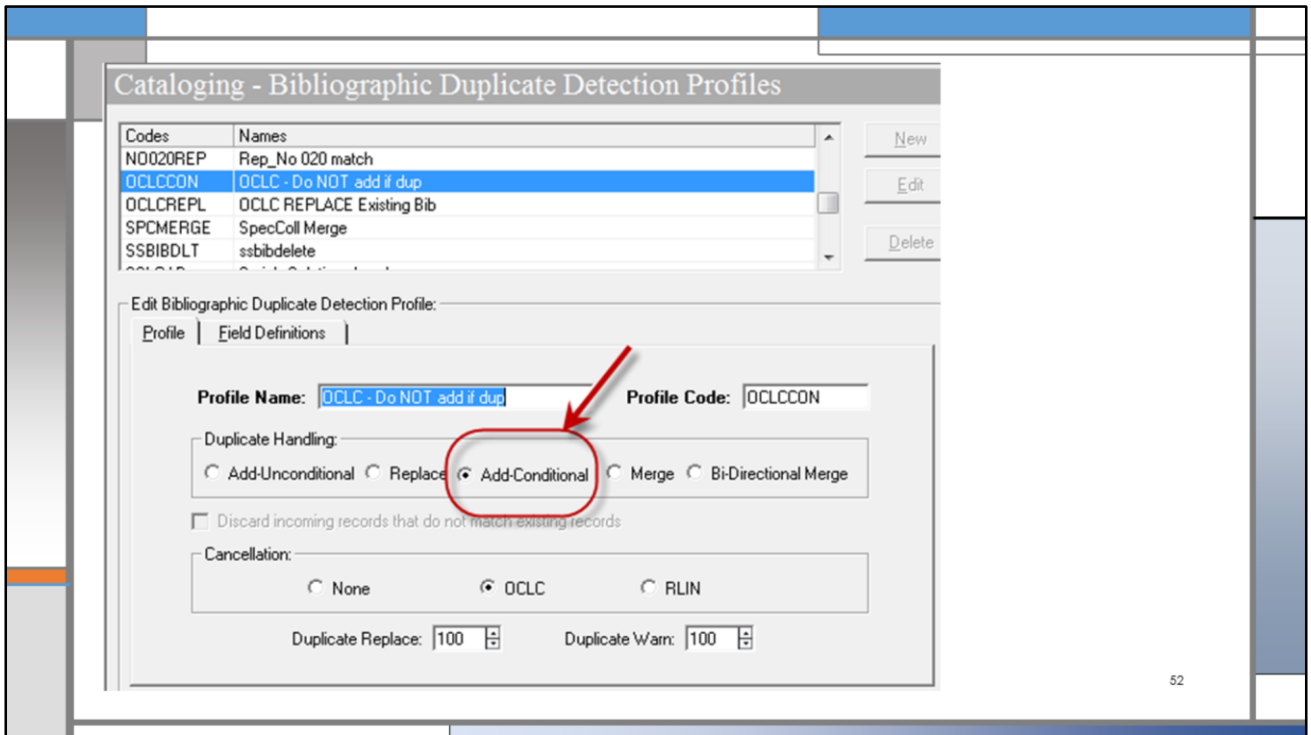
Here's a sample of the results retrieved. Since other workflows may need the LINK field, I include it in the results so that I can use the same query for everything. You can also see the inconsistency in the use of Operator ID which is why I don't use it to retrieve records.

035 field is the same between files

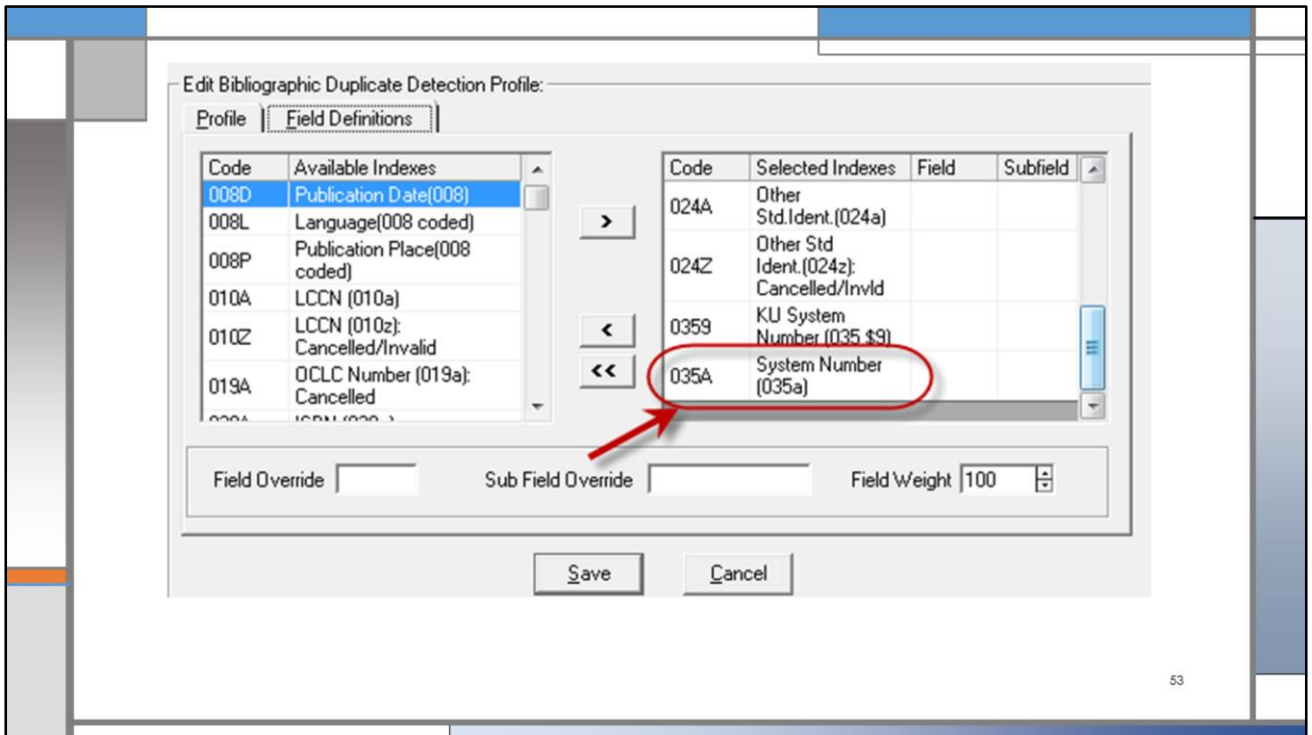
- Create a Bibliographic Duplicate Detection Profile with the Duplicate Handling set to "Add-Conditional"
- The Field Definitions should at the very least include the 035A
- Using this bib duplication profile when you batch load the records will result in only the NEW records being added

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If you're really lucky, the 035 field will be the same between the two files. If this is the case, edit the file of records as usual. Then create/use a bibliographic duplicate detection profile which has the duplicate handling set to Add-Conditional



The field Definitions tab should include the 035A system number as an index.



Using this profile when loading records will result in only the NEW records being loaded into Voyager. The duplicate records will be copied to a discard file on the server.

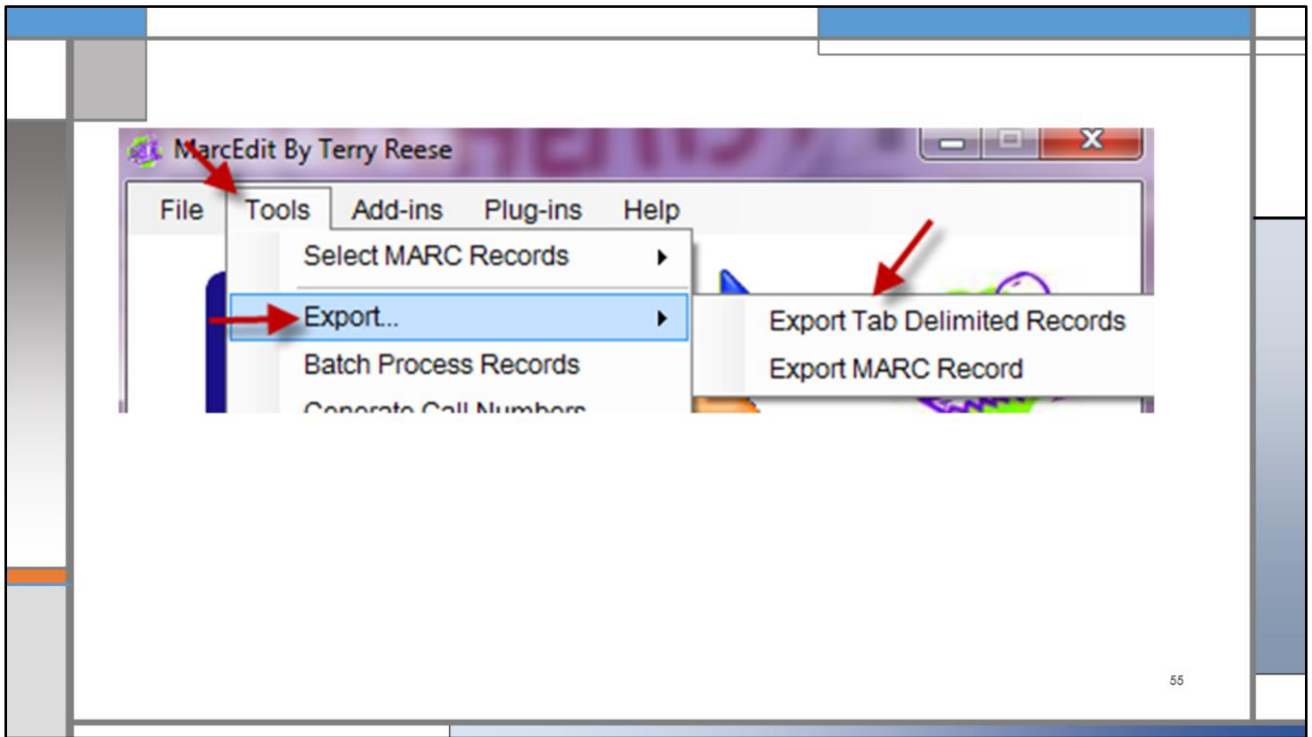
856\$u as matching point

- If the records in Voyager include a proxy that isn't already in the 856\$u of the new record set:
 - add it to the new records or
 - delete it from the file of records we retrieve from Voyager
- Use MarcEdit to export a tab delimited file of the new record set which includes at the very least, the 856 \$u field
- Open the file in Excel. Replace all " (double-quotes) with blank

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If the 035 field isn't an option and you don't want to delete the entire file and re-add the records, you can use the 856\$u to determine which records are new as long as the URLs remained the same.

You will be comparing the 856\$u in the new file with the records already in Voyager so , if the records in Voyager include a proxy that isn't already in the 856\$u of the new record set, you'll need to add it to the new records or delete it from the file of records you will retrieve from Voyager



Use MarcEdit to export a tab delimited file that includes the 856u as one of the fields exported

001 field	URL
001	856\$u
"SSTAR11690415"	"http://www2.lib.ku.edu:2048/login?url=http://www.chinai
"SSTAR10870789"	"http://www2.lib.ku.edu:2048/login?url=http://www.chinai
"SSTAR11397673"	"http://www2.lib.ku.edu:2048/login?url=http://www.chinai
"SSTAR11416440"	"http://www2.lib.ku.edu:2048/login?url=http://www.chinai

Open this exported file in Excel. You'll need to delete all of the quote marks

856\$u - continued

- Use a MS Access query to make a table of all bib record IDs of the vendor/database names
 - Make sure the Link field (the actual URL) is included in your results
- Export resulting table to Excel
- Create a spreadsheet that contains both the new and old 856\$u's in the same column

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Use the MS Access query covered earlier to make a table of all records from that vendor. Be sure to include the Voyager BibID and the LINK field in your results.

Remember, the URL will include the proxy information found in Voyager if you added one. Make sure the links will match by adding the proxy to the new records or deleting the proxy from the table you just created. Export the Access table as an Excel spreadsheet.

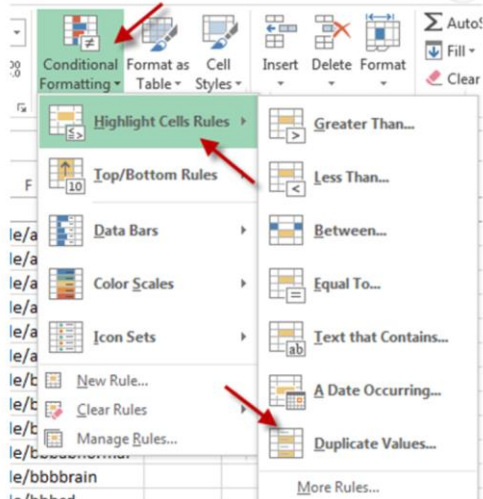
Merge the exported tab delimited file of new records with the exported Excel from Access table of existing Voyager records so that the 856\$u field is in the same column

	A	B	C	D	E	F	G
1	VgerBib ID	LINK					
769	6705926	http://www2.lib.ku.edu:2048/login?url=http://www.credoreference.com/vol/690					
770	6705809	http://www2.lib.ku.edu:2048/login?url=http://www.credoreference.com/vol/85					
771	New record 001 file	New record 856\$u					
772	9781784029784	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/content/title/sageukbody					
773	9781784029777	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/content/title/sageukot					
774	9781784029852	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/content/title/barronscai					

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In this example, records from Voyager are in the top half of the spreadsheet followed by a new header and then the URLs from the new file of records.

Excel Conditional Formatting



Select the 856\$u/LINK column
Click on Conditional
Formatting icon => Highlight
Cell Rules => Duplicate Values

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If using Office 2013, you can select the entire 856\$u/LINK column and then click on Conditional Formatting => Highlight Cell Rules => Duplicate Values. Earlier versions of Excel likely have something similar.

A	B	C	D
VgerBib ID	LINK		
6705924	http://www2.lib.ku.edu:2048/login?url=http://www.credoreference.com/v		
6705926	http://www2.lib.ku.edu:2048/login?url=http://www.credoreference.com/v		
6705809	http://www2.lib.ku.edu:2048/login?url=http://www.credoreference.com/v		
New record 001 fi	New record 856\$u		
9781784029784	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/		
9781784029777	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/		
9781784029852	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/		
9781784029852	http://www2.lib.ku.edu:2048/login?url=http://search.credoreference.com/		

Any field that duplicates another field in the column will be highlighted in the color you selected. Both the duplicate and the original will be highlighted.

Filter results

Pink = Duplicates

No Fill =

In "new" records section => New to Voyager, Add to Vger

In section of exists already in Vger => record no longer available in your package, i.e. Delete

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Next you'll need to filter the results by color

Anything that is highlighted in the new record section duplicates an existing record in Voyager and doesn't need to be loaded again.

Anything in the new record section that is not highlighted is new to Voyager and needs to be added to the catalog

Anything in the "record in Voyager" section that is not highlighted should be deleted from Voyager

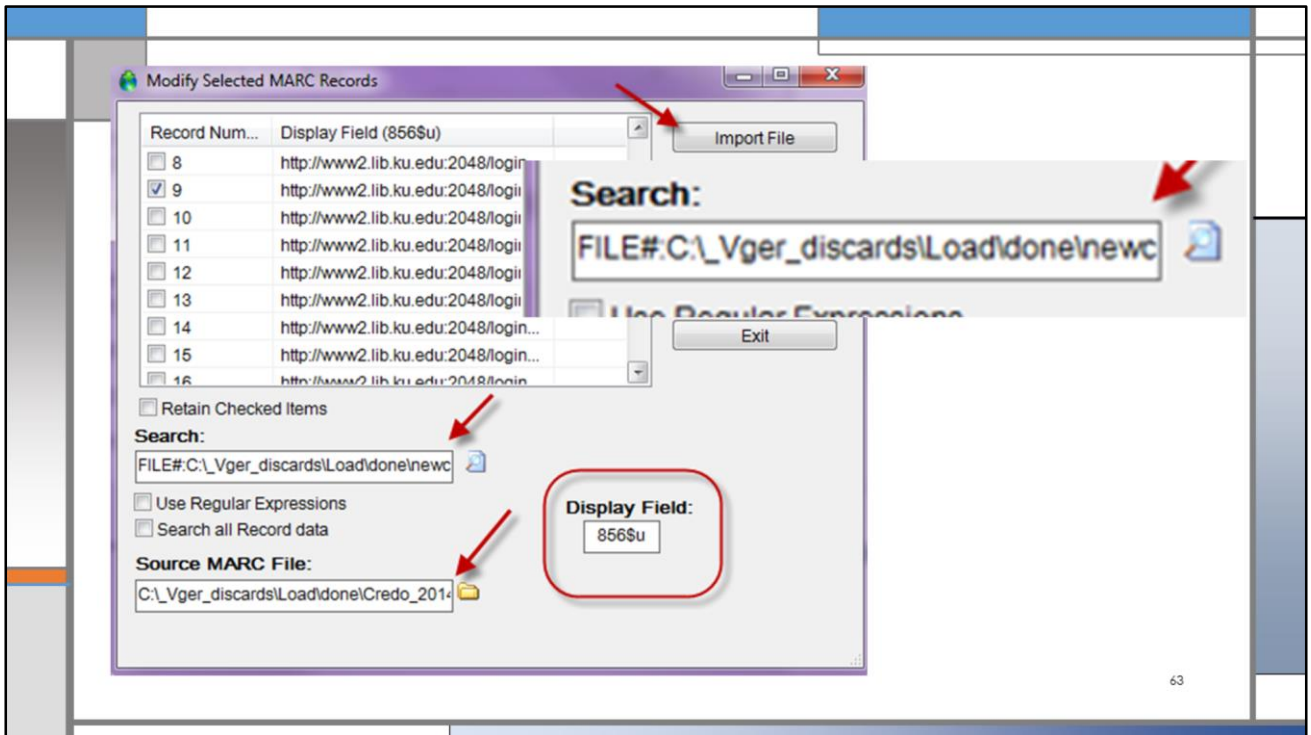
Extract New-to-Voyager records using MarcEdit

- Copy the non-highlighted 856\$u's and paste in a plain text editor, e.g. Notepad
- In MarcEdit click on Tools => Select MARC Records => Extract Selected Records
- Enter the file location of the new file of bib records in the Source MARC File section
- Change the Display Field section to 856\$u
- Import records
- In Search box type: FILE#:file path\file name

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Copy the non-highlighted 856\$u's in the new record section and save into a text document. You can then use this file in combination with MarcEdit to select only the NEW records that need to be added to Voyager.

In MarcEdit click on Tools => Select MARC Records => Extract Selected Records



Open the file of new bib records in the Source MARC File section
 Change the Display Field section to 856\$u
 Click on the Import file button
 In the Search box type: FILE#:file path\file name. The file path and file name is the location and file name of the text file of 856\$u's you created.
 Click on the Search icon
 This will select the matching records which you can save to a separate file when MarcEdit asks.
 Edit the file and load into the catalog.

Deletes

- Any record in the “Records from Voyager” section that isn’t highlighted is likely for a title that is no longer in your collection.
- Verify whether the URL still works and delete the bib if it doesn’t
- Bib Delete setting = Bibliographic record numbers

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Any record in the “Records from Voyager” section that isn’t highlighted is likely a title that is no longer in your collection.

Call up a few of these records and check to see if the URL still works. Sometimes it takes months after a cancellation for the links to stop working, you might as well leave the records in until then.

If/when the links stop working, you can copy the Voyager bib IDs from the spreadsheet into a text file and use the Northwestern’s Bib Delete program set to “Bibliographic record numbers” to delete the records.

Bulk Load profile for edited vendor records

- Same profile is used for all electronic resource record loads
- Duplicate detection profile same as the one used for print resources
- All records loaded as Unicode
- Don't copy 856 to holdings record
 - If URL changes, won't have to update holdings records
- No call numbers
 - Students were seeing the call number and haring off to the stacks without realizing it was an ebook
- Location = internet

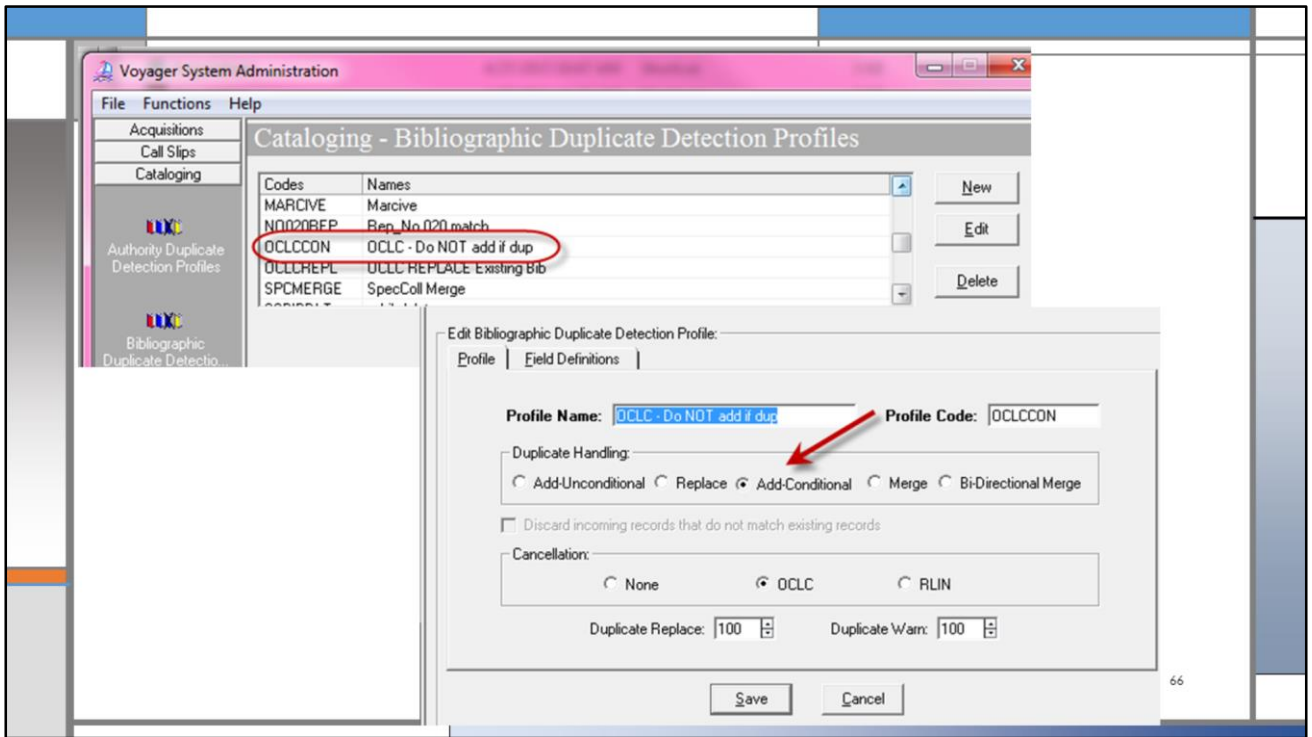
65

We use the same bulk load profile to load all of the vendor records we manually edit and we use the same duplicate detection profile that we use when loading OCLC records for print materials.

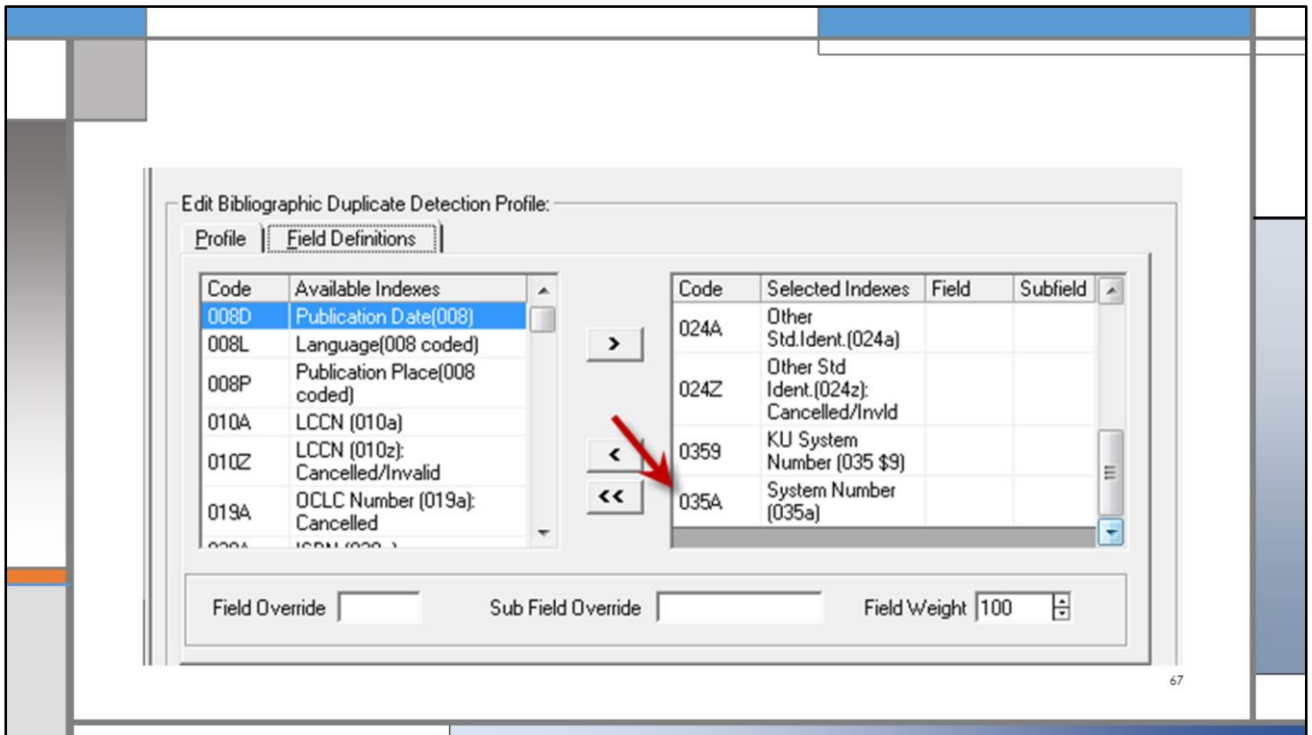
The profile is expecting MARC21 UTF-8 records.

We don't have the 856 field copied into the holdings record. This way we don't have to change the holdings records when the URL changes, we just overlay the bib record or edit the URL in the bib record.

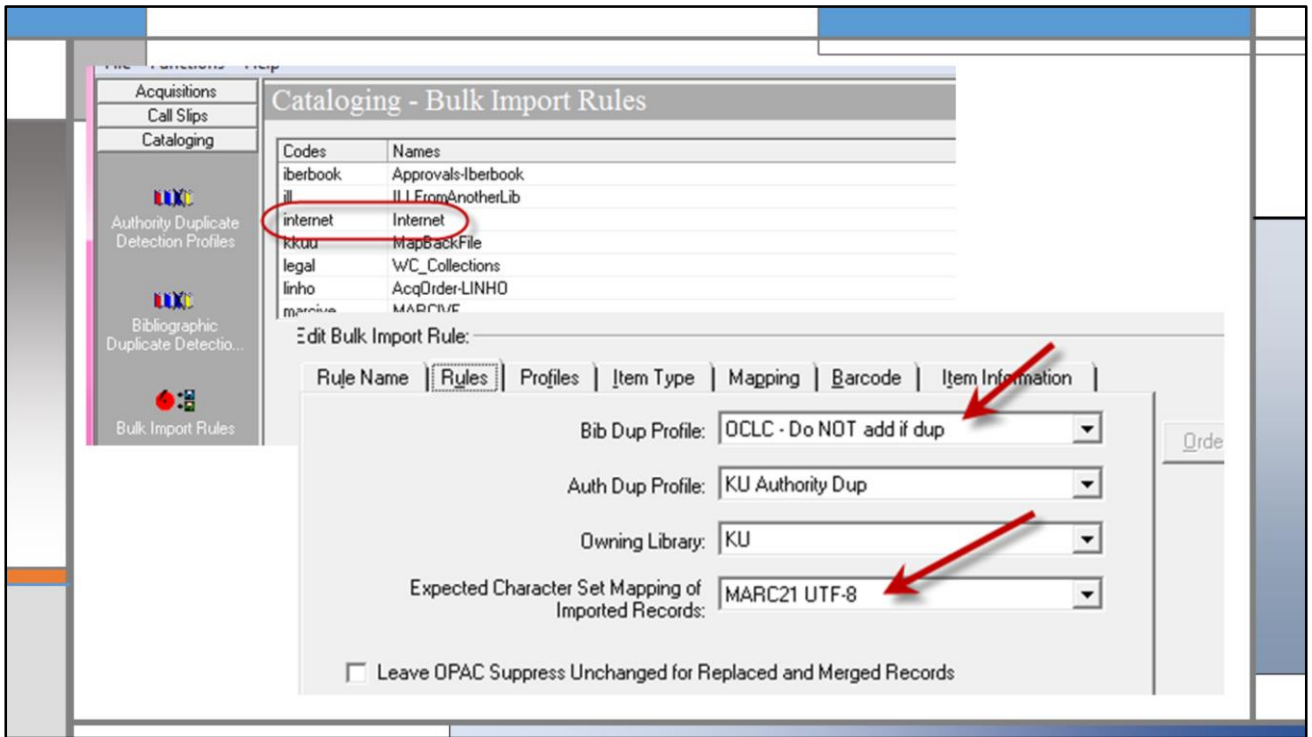
We have a separate location called "internet" for our non-government document electronic resources.



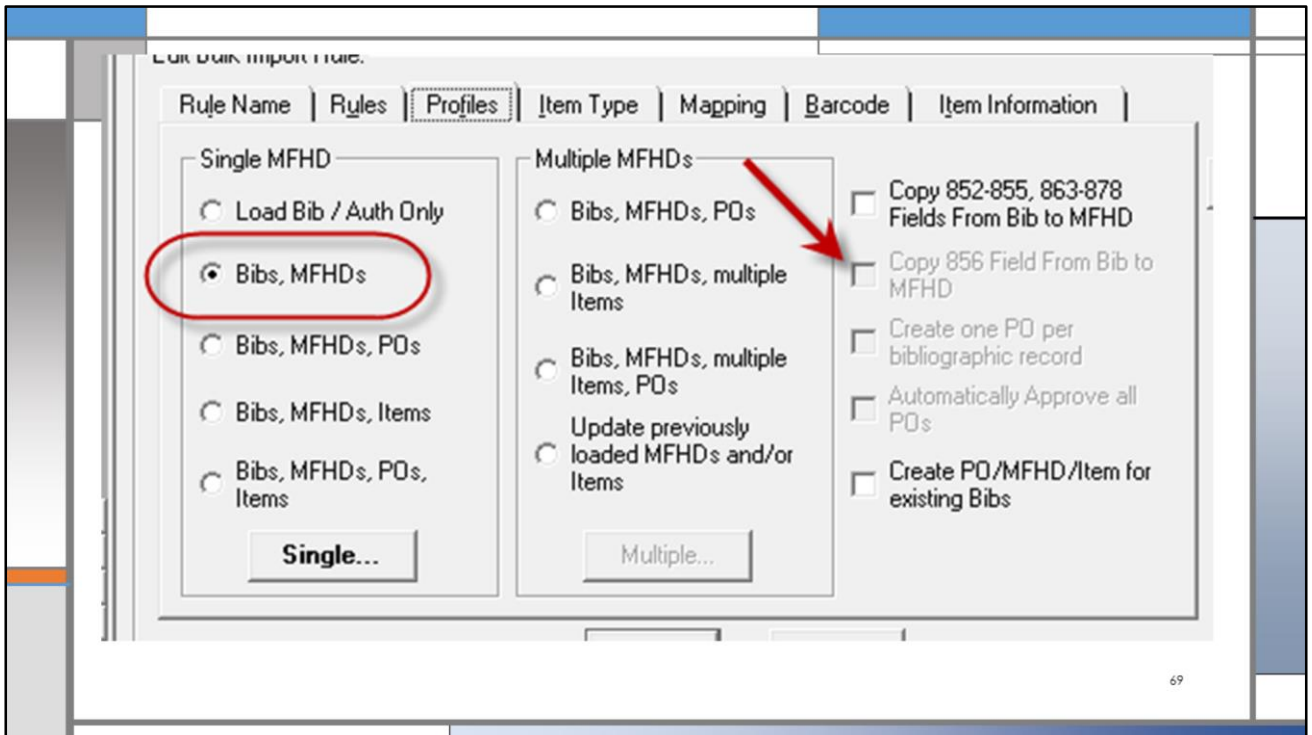
In System Administration module, click on Cataloging => Bibliographic Duplicate Detection.
The Profile tab has "Add-Conditional" selected as the Duplicate Handling



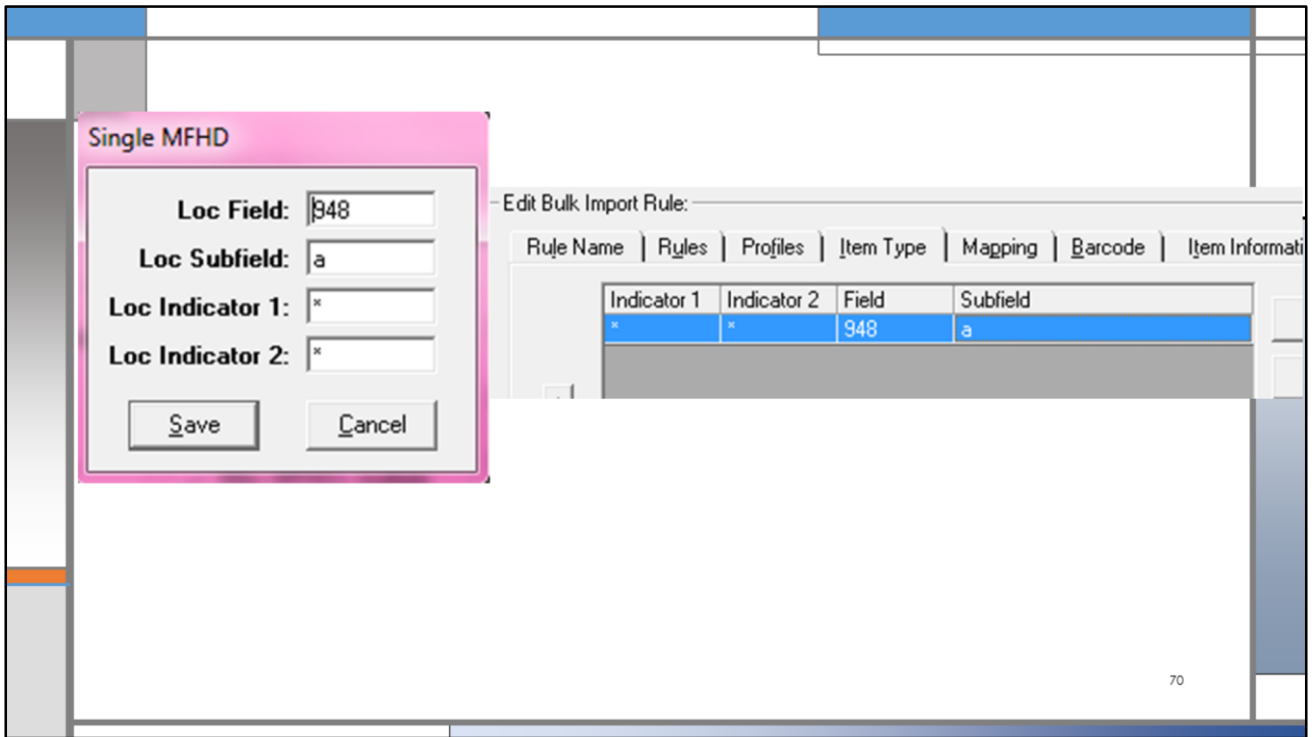
We have selected most of the standard numbers, e.g. ISBN, ISSN and 035 as the Field Definitions.



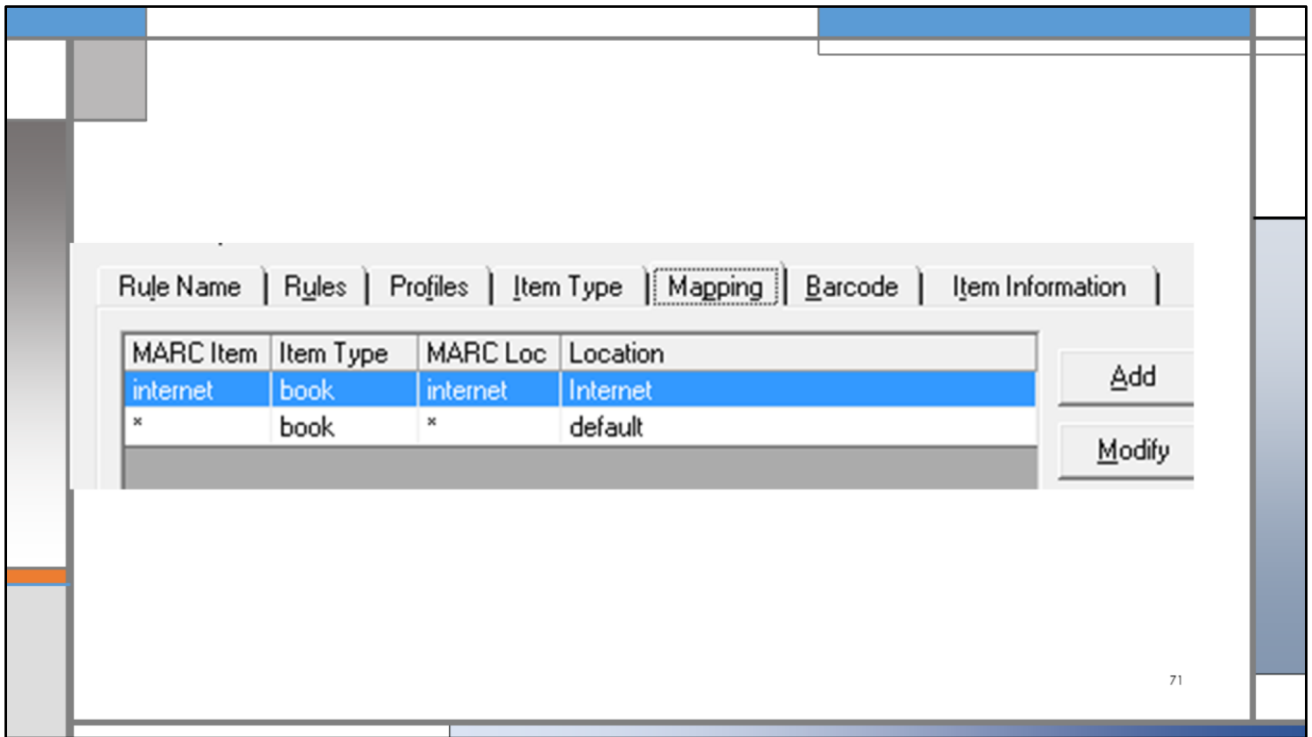
For the bulk import rules, we've named our profile "internet" which is what is entered on the Rule Name tab
On the Rules tab, choose the Bib Dup Profile and set the Expected Character Set Mapping to MARC21 UTF-8 (otherwise known as already Unicode)



On the Profiles tab, we only want a single MFHD with no item records. This is where you could set things so that the 856 field is copied from the Bib to the MFHD. To activate it, you will first need to select the Copy 852-855... box. Click on the Single button to set up the field in the bib record that has the MFHD information



This box tells Voyager that we put the location in the \$a of the 948 field
Here's the Item Type tab



When filling out the Mapping tab, make sure you include instructions for what to do if internet is not the location, just in case. Since we are not creating item records, the Barcode and Item Information tabs are blank

Record Display – Credo Reference

504		‡a includes bibliographical references (p. 603-616) and index.
599	1	‡a Licensed for all KU students, faculty, and staff connecting to the Internet.
650	0	‡a Motion picture actors and actresses ‡z United States ‡v Biography ‡v Dictionaries.
650	0	‡a Actresses ‡z United States ‡v Biography ‡v Dictionaries.
650	0	‡a Women motion picture producers and directors ‡z United States ‡v Biography ‡v Dictionaries.
650	0	‡a Women in the motion picture industry ‡z United States.
655	7	‡a Electronic reference works. ‡2 local
655	7	‡a Electronic books ‡2 local
773	1	‡t Credo reference ‡w (OCoLC)49505165
776	0	‡a Lowe, Denise. ‡t Encyclopedic dictionary of women in early American films, 1895-1930. ‡d New York : Haworth Press, c2005 ‡w (DLC)2003025274 ‡z 078901842X ‡z 0769010436 (pbk.) ‡z 9780769018427
856	4	0 ‡u http://www2.lib.ku.edu:2048/login?url=http://www.credoreference.com/vol/560 ‡z Connect to electronic text. -- (Source: Credo reference)

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So after all that work, here's what part of the record looks like in Voyager. Note the 599, 6xx, 773 and 856 \$z field.

An encyclopedic dictionary of women in early American films, 1895-1930...

Database: University of Kansas Libraries

Main Author: Lowe, Denise.

Title: An encyclopedic dictionary of women in early American films, 1895-1930 [electronic resource] / Denise Lowe.

VIEW ONLINE - CLICK ON LINK: Connect to electronic text. -- (Source: Credo reference)

Subject(s): Motion picture actors and actresses --United States --Biography --Dictionaries.
Actresses --United States --Biography --Dictionaries.
Women motion picture producers and directors --United States --Biography --Dictionaries.
Women in the motion picture industry --United States.

Genre Headings: Electronic reference works.
Electronic books

Publisher: New York : Haworth Press, c2005.

Format: Book

Description: viii, 623 p. : ill.

Summary: "... an A-to-Z reference guide (illustrated with over 150 hard-to-find photographs!) that dispels the myth that men dominated the film industry during its formative years ... presents a rich collection that profiles many of the women who were crucial to the development of cinema as an industry and as an art form."-- Publisher's description.

General Notes: Title supplied by vendor.
Includes graphical cross-reference mapper.
Includes bibliographical references (p. 603-610) and index.

Availability: Licensed for all KU students, faculty, and staff connecting to the Internet.

KU Bib ID: 6705879

System Numbers: (CtWdGI)xrc8901842X

Stable ID for this record: <http://catalog.lib.ku.edu/cgi-bin/Pwebrecon.cgi?bbid=6705879>

Location: Available via the Internet

Status: Item details not available

VIEW ONLINE - CLICK ON LINK: Connect to electronic text. -- (Source: Credo reference)

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Here's what the record looks like in our Classic Voyager catalog. We have the hyperlink in two locations, one at the top and one down in the holdings.


Location: Available via the Internet
Status: Item details not available

VIEW ONLINE - CLICK ON LINK: Connect to electronic text. -- (Source: Credo reference)

Sign in Sign in with your KU Online ID to recall books, save items and searches, tag items, and more.

Results 1 - 10 of 15 for **QUICK** Sorted by: **Relevance** ▾

Show only [Peer-reviewed Journals](#) (5) | [Available in the Library](#) (1)

1  **An encyclopedic dictionary of women in early American films, 1895-1930**
Credo reference (OCoLC)49505165
Denise. Lowe; c2005
Online access. Physical copies may be available for some books.

E-Reference [View Online](#) ▾ [Locations & Availability](#) ▾ [Details](#) ▾ [Reviews & Tags](#) ▾ [Request](#) ▾ [More](#) ▾

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Here's a blown up view of the link text and here's what the record looks like in Primo.

EDDA, PDDA, and purchased ebooks

- EDDA – EBL, ebrary, EBSCO
 - Load “discovery” records weekly
 - Records are filtered based on profiles in Gobi and then reviewed by collections staff
 - Same location “internet” as other ebooks
- PDDA – Selected by collections staff
 - Location = *pod ; Catalog display = Ask KU Libraries to buy this book
- Individual ebooks
 - Order record loaded
 - Overlaid with full record for ebook with working 856\$u link
- Vendor (Yankee) has our specifications for record edits and proxy so no manual edits needed

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And then there's the EDDDA and PDDA and what happens if we purchase an individual ebook.

We get discovery records for EDDA and PDDA weekly. For ebooks our vendors are EBL, ebrary and EBSCO. These records are filtered based on profiles we've set up in Gobi which are then reviewed by collections staff.

If an ebook title is used enough times to trigger a purchase, the discovery record is deleted from Voyager to prevent anyone else from requesting it again. At the same time, we use Gobi to order the ebook which generates an order record. Electronic order records are delivered and loaded the morning after the title is ordered. Once we've paid for the ebook, Yankee provides a full bib record for the book with a working 856\$u link. This record overlays the existing order record in Voyager when loaded. Since this is usually another 24 hour wait, Acquisitions staff will add the 856 \$u to the order record that displays in the catalog so the patron can access it right away.

Since Yankee has our technical specifications for the record edits and proxy we want, no manual editing is needed prior to loading.

Load profile for DDA & purchases

- EDDA = Bib duplicate detection is ONLY on 035A
- PDDA = Mapping tab has *pod for location
- Full record for individual title purchases =
 - Dup detection profile used is set to "Replace" in duplicate handling
 - Match point is 024A

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The EDDA load profile uses a bib duplication profile set to Add Conditional and the Field Definition tab only has the 035A as the match point.

The PDDA profile is the same as the one used for print resources except for the location on the Mapping tab is *pod

For individual ebook purchases we just overlay the order record with the full record based on the 024 field.

Record examples

300		1	1	online resource.
336				text text rdacontent
337				computer c rdamedia
338				online resource b cr rdacarrier
599	1			Licensed for all KU students, faculty, and staff connect to Internet.
600	1	0		Smith, Barbara, 1946-
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Here's what the MARC records look like in Voyager. The EDDA record has a 910 field of YBP EDDA so that staff can easily see why the record is in the catalog. The PDDA record also has a 910 field. The location is *pod instead of internet and the other 9xx fields have price and format information.

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Ain't gonna let nobody turn me around forty years of movement building with.

Database: University of Kansas Libraries

Title: Ain't gonna let nobody turn me around [electronic resource] : forty years of movement building with.

VIEW ONLINE - CLICK ON LINK: [Connect to electronic text.](#) - (Source: Ebrary eDDA)

Subject(s): Smith, Barbara, 1946-

- 2  **Ain't gonna let nobody turn me around forty years of movement building with.**
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2014
Ebook
Online access. Physical copies may be available for some books.
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- 3  **Ain't gonna let nobody turn me around : forty years of movement building with.**
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In the Classic Catalog, you can see that except for the source in the hyperlink, the EDDA records look like our other eresource records. The Primo display shows the we have both a PDDA and a EDDA record for the title.

Are men obsolete? : the munk debate on gender / Hanna Rosin, Maureen Dowd,...

Database: University of Kansas Libraries
Title: Are men obsolete? : the munk debate on gender / Hanna Rosin, Maureen Dowd, Caitlin Moran

Other Entries: Paglia, Camille, 1947-
Dowd, Maureen,
Rosin, Hanna,
Moran, Caitlin, 1975-

Subject(s): Men --Social conditions.

Publisher: Toronto : Anansi, 2014.
Series: Munk debates.
Format: Book
Description: pages cm.

General Notes: Debate held November 15, 2013, Toronto, Ontario.
Paglia, Camille.
Issued also in electronic format.

ISBN: 9781770894518
1770894519 (pbk.)

KU Bib ID: 8013583

System Numbers: (OCoLC)ocn860756297
(OCoLC)860756297

URL for this record: <http://catalog.lib.ku.edu/cgi-bin/Pwebrecon.cgi?bbid=8013583>

1 **Are men obsolete? : the munk debate on gender**
Camille Paglia 1947- panelist.; Maureen Dowd panelist.; Hanna Rosin panelist.
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And here's the PDDA record in Voyager and Primo. The Get at KU button and the Ask KU Libraries to buy this book link go to a form that can be filled out to request a purchase

Questions??



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