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Sirsi Integration with a Discovery Tool

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O'Shea, Denise; Hughes, Kathleen; and Mallery, Mary, "Sirsi Integration with a Discovery Tool" (2013). *Sprague Library Scholarship and Creative Works*. 1.
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Sirsi Integration with a Discovery Tool

Denise O'Shea
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Harry A. Sprague Library

Task List

1. Provide vendor with answers to questions about how to customize your catalog within the discovery service.
2. Export MARC data, with holdings, from your ILS and upload file(s) to vendor's FTP server.
3. Establish procedures for updating the data.
4. Look at customizing the interface.
5. Test, modify, re-test, document.

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Vendor Setup & Profile

- Catalog
  - technical questions that help the vendor implement your catalog within the discovery service.
- Content
  - information about how the vendor should configure custom linking to full text as well as information about which Link Resolver, if any, your institution is using.
- Branding
  - options for customizing the look and feel of your discovery service.

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Preparing for Data Extracts

- Get vendor's FTP account information for uploading your catalog MARC data
- Find out
  - what fields to include when exporting your catalog records (including RDA fields)
  - how to upload your catalog data (in an uncompressed format) to the FTP account

MARC Data Exports

- The following metadata elements should be included in your export in a machine-readable format:
  - A unique identifier in each record.
  - Holdings data (also known as item data). This may include location codes, call numbers, other copy information, etc.
  - URLs for e-resource content. Usually this is in the 856 field.

Record Formats

- Find out what formats your vendor supports:
  - MARC-8
  - UNICODE
  - UNIMARC
  - MARC21
  - KORMARC
  - CNMARC
  - MARCXML
  - Other formats…

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Machine-Readable Format

120702s2011||||||| s||||||||||eng|d a9781449318970c15.99 (NL)
a(Sirsi) EBL801437 a(Sirsi) EBL801437 aEBL801437 a(OCoLC)767502380
aAU-PeELbengcAU-PeELdAU-PeEL 4aHM742 .O74 201100a006.754a302.302851
aO'Reilly, Tim.14aThe Twitter Bookh[electronic resource]. a2nd ed.
aSebastopol :bO'Reilly Media, Inc.,c2011. a1 online resource (256 p.)
aDescription based upon print version of record.0 aAbout the Authors;
Contents; Introduction; What is Twitter?; What's Twitter good for?Ambient
intimacy; What's Twitter good for?Sharing media and commentary; What's Twitter
good for?Breaking news and shared experiences; What's Twitter good for?Mind
reading-and mind opening; What's Twitter good for?Business and civic conversatio
ns; CHAPTER 1 Get Started; Sign up; Understand what "following" means; Don't
follow people yet; Quickly create a compelling profile; Find the people you
know on Twitter; Get suggestions for cool people to follow; Tweet from the
road; Test-drive the 140-character limit8 aTrim messages that are too longThe
secret to linking in Twitter; Figure out how many people to follow; Join a
conversation:the hashtag (#) demystified; Key Twitter jargon: tweet; Key
Twitter jargon: @messages; Key Twitter jargon: retweet; Key Twitter jargon: DM;
Key Twitter jargon: trending topics; Key Twitter jargon: tweetup; Twitter
jargon: Fail Whale; Try it for three weeks oryour money back-guaranteed!; Get
help from Twitter;

Human-Readable Format

100: 1 : O'Reilly, Tim.

245: 14 :The Twitter Book|h[electronic resource].

260: : Sebastopol :|bO'Reilly Media, Inc.,|c2009.

300: : 1 online resource (240 p.)

500: : Description based upon print version of record.

505: 0 : About the Authors; Contents; Introduction; What is Twitter?; What's Twitter good for?; Ambient intimacy; Sharing news and commentary; Breaking news and shared experiences; Mind reading; Business conversations; CHAPTER 1. Get Started; Sign up; Quickly create a compelling profile; Understand what "following" means; Find the people you know on Twitter; Get suggestions for cool people to follow; Twitter from the road; Test-drive the 140-character limit; Trim messages that are too long; The secret to linking in Twitter; Figure out how many people to follow

Unique Identifiers

- All data uploaded to the vendor's FTP server **must** contain unique identifiers.
- Identify the MARC field/subfield that contains a persistent, unique identifier for each record:
  - Example: 001, 907 $a, 035 $a

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Holdings Information

- Tell the vendor the MARC fields, subfields, and/or values in your data that are used for holdings fields.
- The values you identify will display on the results page and detailed records.
- The vendor may use these values to create location limiters and to index call numbers and locations.

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Decide What's Not Included

- At MSU decided not to include:
  - Items on Order
  - Laptops, AV equipment
  - Lost, Withdrawn, Long Overdue or Missing items
  - Personal Print Reserves materials

Real-time availability checking (RTAC)

- RTAC is used to retrieve and display holdings (status, location, call number, etc.) in real-time for your catalog items.
- RTAC can be implemented via your z39.50 service or the REST API.

Direct Links

- Provide the permalink and URL syntax that links to each item record in Sirsi.
- Adding the link enables users to go directly from the Discovery Tool to the item in Sirsi:
  - http://{YourCatalogURL}/uhtbin/cgisirsi.exe/x/0/0/57/5/3?searchdate1={UniqueID}%7BCKEY%7D

Other Considerations

- Do you want URLs contained in the record to display on the Results page?
- How should ebooks , audiobooks and streaming media be identified?
- Create a location look-up table (optional)
- Does Sirsi support harvesting data via Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH)? Why is this imp?

FTP Decisions

- Full set of data, size of collection
  - Single file
  - Multiple files
- Updates
  - Adding new records
  - Modifying existing records
  - Deleting records
- Frequency of updates

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Sirsi Data Extract and FTP Options

- 3 Options:
  - Manual, via Sirsi reports and utilities
  - Automated, via the API
    - Library must have API training
  - Automated, via script provided by Sirsi
    - Get cost ($) from your Sirsi sales rep

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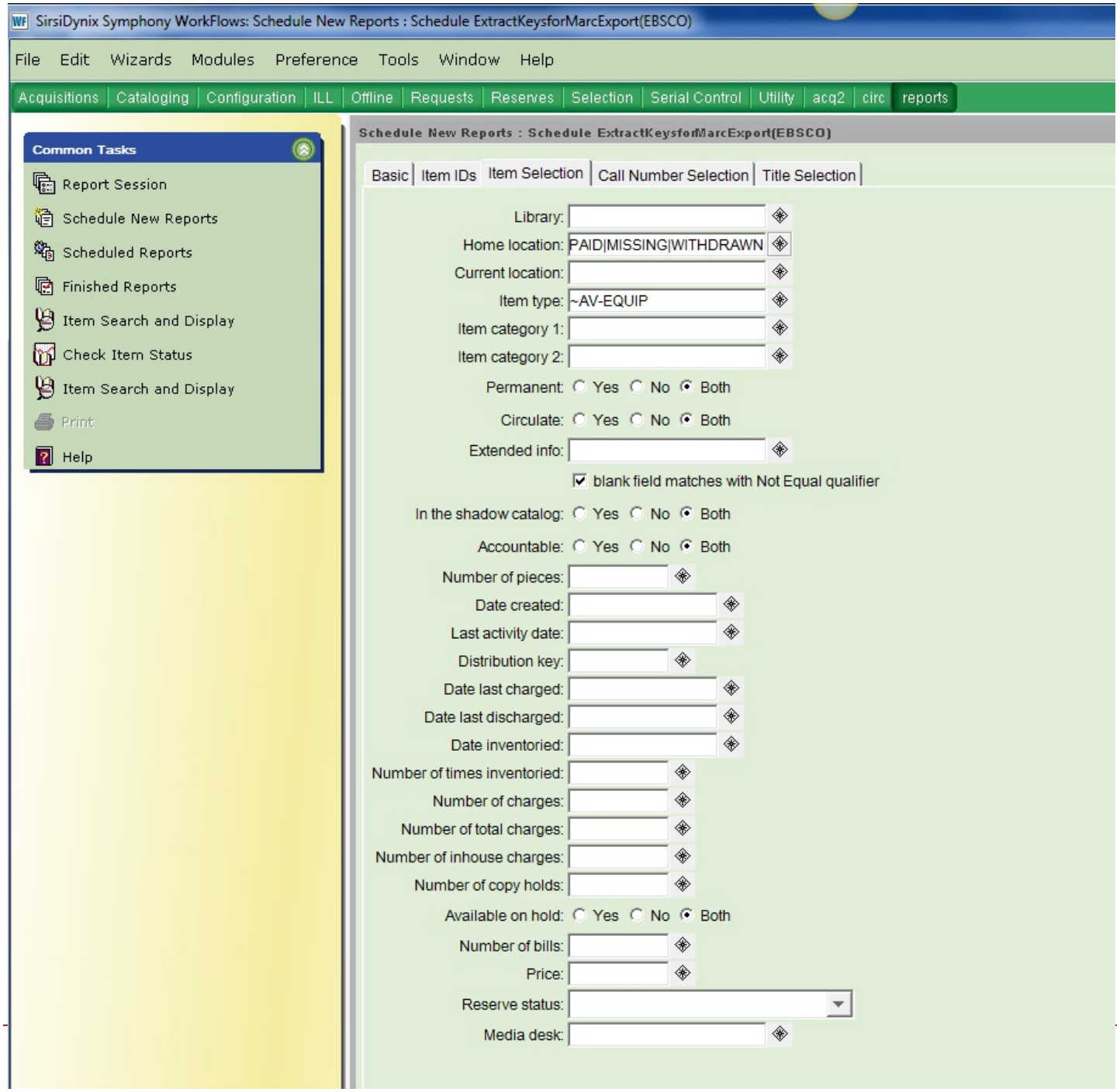
The Manual process

- A 3 part process
  - Run Extract Keys for Marc Export report to select the records
  - Use the Marc Export Utility to export the records selected by the report
  - FTP file to vendor

Extract Keys for Marc Export

- Identifies records to be exported and creates a single file of record keys ("dumpkeys").
- Dumpkeys is used by the MARC Export utility for creating the file(s) of exported records.
- Records may be selected either by their common characteristics such as title creation date, format, or item type, etc.
- After running the report, use the MARC Export Utility Wizard to create files of exported records.


SirsiDynix Symphony WorkFlows: Schedule New Reports : Schedule ExtractKeysforMarcExport(EBSCO)
File Edit Wizards Modules Preference Tools Window Help
Acquisitions Cataloging Configuration ILL Offline Requests Reserves Selection Serial Control Utility acq2 circ reports
Common Tasks
Report Session
Schedule New Reports
Scheduled Reports
Finished Reports
Item Search and Display
Check Item Status
Item Search and Display
Print
Help
Schedule New Reports : Schedule ExtractKeysforMarcExport(EBSCO)
Basic Item IDs Item Selection Call Number Selection Title Selection
Library:
Home location: PAID|MISSING|WITHDRAWN
Current location:
Item type: ~AV-EQUIP
Item category 1:
Item category 2:
Permanent: Yes No Both
Circulate: Yes No Both
Extended info:
blank field matches with Not Equal qualifier
In the shadow catalog: Yes No Both
Accountable: Yes No Both
Number of pieces:
Date created:
Last activity date:
Distribution key:
Date last charged:
Date last discharged:
Date inventoried:
Number of times inventoried:
Number of charges:
Number of total charges:
Number of inhouse charges:
Number of copy holds:
Available on hold: Yes No Both
Number of bills:
Price:
Reserve status:
Media desk:

MARC Export Utility Wizard

- Used to export catalog records from the SirsiDynix Symphony database and copy them to a file on the workstation or the SirsiDynix Symphony server.
- The files of exported records are always saved to the /temp directory on your server.
  - This may be an issue for Saas libraries
- The wizard reads only the latest dumpkeys file created. You must run a single Extract Keys for MARC Export report, then export the records identified by the dumpkeys file *before* running another Extract Keys for MARC Export report.

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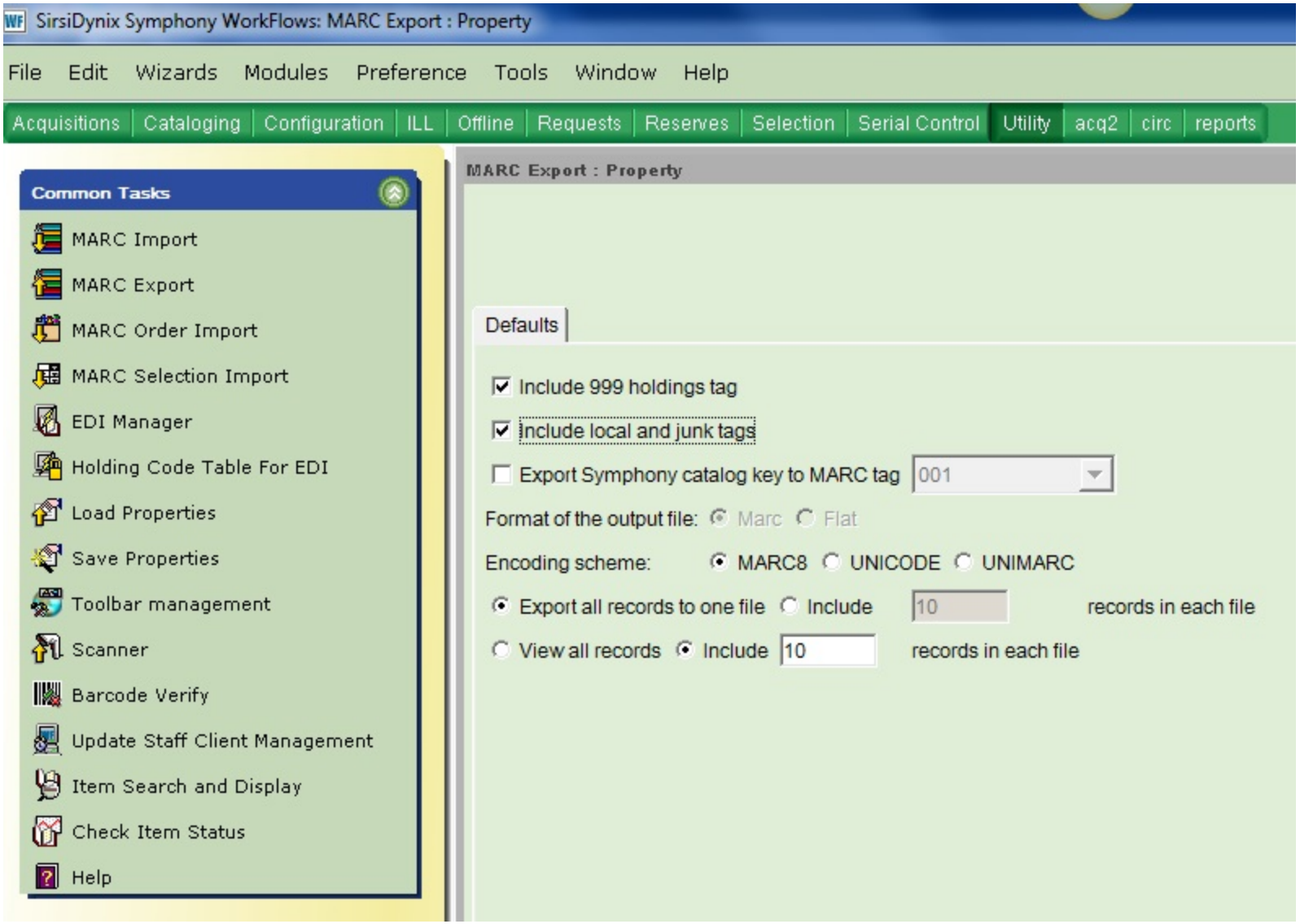
Export Properties

- Include local (999) holdings and junk tags
- # of files, # of records
- File name, save file location
- Preview records


SirsiDynix Symphony WorkFlows: MARC Export : Property
File Edit Wizards Modules Preference Tools Window Help
Acquisitions Cataloging Configuration ILL Offline Requests Reserves Selection Serial Control Utility acq2 circ reports
Common Tasks
MARC Import
MARC Export
MARC Order Import
MARC Selection Import
EDI Manager
Holding Code Table For EDI
Load Properties
Save Properties
Toolbar management
Scanner
Barcode Verify
Update Staff Client Management
Item Search and Display
Check Item Status
Help
MARC Export : Property
Defaults
Include 999 holdings tag
Include local and junk tags
Export Symphony catalog key to MARC tag
001
Format of the output file: Marc Flat
Encoding scheme: MARC8 UNICODE UNIMARC
Export all records to one file Include
10
records in each file
View all records Include
10
records in each file

RC Export

Export | Preview

Records selected on: Wed May 22 10:07:19 Record count: 620339

Save exported records: (•) On server ( ) On client

File name on server: msu_ebsco_052213

File name on client:

log.txt - Notepad

File Edit Format View Help

```
CQdOCLCGdOSU  a43507149  a(OCoLC)47713753z(OCoLC)435071490 ahebaeng
apcc  aa-is--- 4aNB237.A91bA4 1997  aNJMM1 6880-01aAverbuch,
Ilan,d1953-106880-02aIlan Averbukh :bpisul ve-rishum.15aIlan
Averbuch :bsculpture and drawing306880-03aPisul ve-rishum30aSculpture
and drawing146880-04aPesalim ve-rishumim  6880-05aTefen :bha-Muzeon
ha-patuah,cc1997.  a62, 30 p. :bill. (some col.) ;c29 cm.  aHebrew and
English.  aIncludes interview by Annie Goldenberg.  aCatalog of an exhibitio
n held at the Open Museum, Tefen, Israel, June 1997.10aAverbuch, Ilan,d1953-
vExhibitions.2 6880-06aMuzeon ha-patuah (Tefen, Israel)1 6100-01//ra♦
♦,אילן, אורבוך, איילd1953-106245-02//raאילן אורבוך
:bפיסול ורישום.306246-03//raפיסול ורישום146
246-04//raפסלים ורישומים  6260-05//ra:תפן bמ
,מוזיאון הפתוחc1997.2 6710-06//raמוזיאון הפתוח♦
♦ (תפן, ישראל)  aPR 440087953  aCObNJM  aNB237.A91 A4 1997wLCc1
i33000009925018lSTACKSmSPRAGUErYsYtBOOKu5/6/2013zMAMLo.PUBLIC. Gift of
the LeBrun Library, Montclair Art Museum
620351 MARC records read
0 MARC records in error
618534 records successfully converted.
1817 records converted with warnings.  See error log.
```

FTPing Your Files

- If you are a Saas library, you must first FTP the file from the Saas server to a local workstation, then
- FTP the file from your workstation to the vendor.
- We use Filezilla for secure FTP file transfer but there are other tools you can use.

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Interface Customization

- Convened several meetings with our OPAC committee to discuss:
  - Integration of Sirsi catalog records within the discovery tool
  - Display of catalog records in the discovery tool
  - Problems, issues, and concerns

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OPAC Committee Recommendations

- A team approach to implementing the discovery tool.
- That the Library include a feedback form in the discovery tool search box on the library's homepage.
- We look at how other schools implemented their discovery tool and identify best practices.

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Problems & Questions, part 1

- Confusing icons for the different item types
- Call numbers not appearing for some item types – e.g., streaming music, gov docs
- Incorrect field mapping (status mixed up with location)
- Records loaded from vendors that our library does not subscribe to
- Questions about how the tool handles book chapters, essays, and dissertations
- Definition of some terms and phrases such as 'peer review' and 'available in library collection'

Problems & Questions, part 2

- Boolean logic
  - How is it defined?
- Options for limiting searches
  - Languages not sorted alphabetically, why?
  - Books did not appear as the first option under limits by source type
- Periodicals List
  - How is searching defined and what does it include?

Review of Tasks

1. Provide vendor with answers to questions about how to customize your catalog within the discovery service.
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