

Loading Marcive Records into Voyager Databases

With the migration to Voyager, ILCSO has not yet resumed the loading of Marcive records into the individual library's Voyager databases. There are two main reasons for this:

- (1) We do not have Voyager bulk import capability that supports Embedded Holdings mode, as we had known it under our DRA implementation. Not all ILCSO Marcive customers used Embedded Holdings mode previously, however.
- (2) Current existing Voyager functionality does not support creation of call number prefixes in MFHD 852 \$k as part of bulk import. Most ILCSO Marcive customers have used call number prefixes on at least some of their call numbers in the past.

ILCSO included in our contract with Endeavor (EISi) that they create support for Embedded Holdings, as well as support for the creation of automatic call number prefixes. We are still awaiting receipt of this software from EISi. We have no firm information from EISi as to when we will receive this software, which of course will also have to be tested before it can be approved for general ILCSO use. Because of the uncertainty of a timeframe for receipt of this software from EISi, several ILCSO libraries have contacted the ILCSO Office with a request to move forward in loading their backlog of Marcive data, even without what we consider to be full bulk import functionality.

To help with this process, the ILCSO Office has been in contact with other Voyager/Marcive customers to see what they have done about the lack of automatic call number prefix creation during bulk import. ILCSO has identified several alternative options that libraries may wish to consider. These options are outlined below. If none of these options are acceptable to the library, the library may choose to continue to wait for the needed software to be delivered by EISi.

No matter which load option the library may elect to use (see below), the library's ILCSO Liaison or Library Director must file an online work request (WRO) to resume Marcive loading. Use the Work request type "Voyager bulk import." This WRO form contains fields that must be included, and a Notes field (on the screen after the pre-defined information) where additional information will be entered. A separate WRO must be filed to resume the Marcive loading for each different type of dataset received by the library, to insure that each dataset(s) is loaded with the correct parameters. The WRO(s) are only required to resume the regular monthly Marcive load process; libraries do not need to file a WRO each month after their loads have resumed. See the "WRO requirements" under each load option below for more details.

Also, each library will need to work with Marcive to change their Marcive profile. The changes may be different for each library, depending on the library's current profile and the load option they elect to use. At a minimum, libraries need to ask Marcive to change the format of the 049 \$1 data, from a DRA material type code to the appropriate (for your library) Voyager item type abbreviation. (See http://www.ilcso.uiuc.edu/Web/voyager/general/020531_oclc_dataentry.html) for

information on coding bib records for batch loading, including the list of item type code abbreviations to be used in 049 \$1). Other profile changes may be necessary, depending on the load option selected and the library's current Marcive profile.

The library should also make arrangements with Marcive to supply to ILCSO a test dataset(s) that contains records that represent the library's new Marcive profile. It is recommended that the test data be the first month of your backlog (e.g., April 2002 for most ILCSO libraries).

Some of the load options below require changes to the library's bulk import rules in the Voyager System Administration client. It is the library's responsibility to make sure that the required SysAdmin data entry is in place and accurate before the WRO is filed.

When ILCSO ITSG staff receive a WRO to load Marcive records into the local database, and the test records have been received, the first 20 Marcive records in each dataset will be loaded, and a log file will be generated. Library staff will need to review those records for accuracy. If the library approves the 20-record load, ILCSO will then load the remaining Marcive records into the local database. The full load will generate an additional log file. Until the ILCSO Voyager Reports server is functional, these load log files will be placed in the xxFTP account on the DRA server.

If the initial test load does not meet the library's needs and additional changes are needed to the Marcive profile, it is the library's responsibility to work with Marcive on any necessary Marcive profile changes.

If the initial test load does not meet the library's needs and it is determined that SysAdmin changes are needed, it is the library's responsibility to make these changes in the local database.

After a successful load of the test records, the library is responsible for relaying this information to Marcive, and to make arrangements for the delivery of the remainder of their backlogged Marcive data to ILCSO.

Marcive Record Load Options

Below are some options identified for the resumption of Marcive record loading into the individual library's Voyager database. If the library has needs that are not met by one of these options, please contact Casey Sutherland at the ILCSO Office to discuss your library's Marcive load requirements. ILCSO will work the library to determine if your requirements can be met with existing Voyager load functionality.

Option 1: Load a single Marcive dataset per library per month; create a bib record, MFHD, and item record for each Marcive record.

This load option is very similar to how the Marcive records were loaded in our DRA environment. Each library's monthly set of full GPO bib records are contained in a single dataset and the records would be processed as Express mode transactions using existing Voyager bulk import functionality.

The same limitations that we currently have with batch loading our OCLC transactions are found with this option, specifically:

- No support for creation of automatic call number prefixes (MFHD 852 \$k) in bulk import
- No support to default to anything other than copy zero in the item record created by bulk import
- No support for additional data in 049 \$a (other than an OCLC holding code)

Libraries who wish to use this option would have to edit the applicable MFHDs manually to add a call number prefix. If it is the library's policy, they would also need to edit each item record to change the copy number from 0 to 1.

SysAdmin requirements for this option:

To use this option, libraries will need to have an entry in their Express mode bulk import rule, Mapping tab, that maps each unique combination of 049 \$a <OCLC holding code> \$l <Voyager item type abbreviation> to the appropriate Voyager location and item type.

If the library's existing Express mode bulk import rule can be used for loading Marcive records (i.e., there is no conflict between an existing entry in the Mapping tab and the new mapping needed for Marcive records), the library can add an entry/entries to the existing Express mode bulk import rule for Marcive processing.

If, however, the library's existing Express Mode mapping conflicts with the mapping needed for your Marcive profile, then a new bulk import rule will need to be created for Marcive loading purposes. A suggested naming convention for this new bulk import rule code is "MARCIVE." Libraries should follow the basic conventions used in their Express Mode bulk import rule (e.g., location taken from 049 \$a, item type from 049 \$l, barcode from 049 \$p) but set the data in the Mapping table to that needed for your Marcive data. See the ILC SO SysAdmin documentation, Cataloging section, available from <<http://www.ilcso.uiuc.edu/web/voyager/sadocs/>> for more information on establishing bulk import rules.

NOTE: Whether you use the existing Express mode bulk import rule or create a new one, be sure the call number hierarchy that is used in the Mapping tab entry for your Marcive data uses the correct call number fields per your library policy. You may need to add, for example, the SuDoc call number (086 field) to an existing call number hierarchy, or create a new call number hierarchy that uses SuDoc for your Marcive records.

NOTE 2: If your library adds a new Mapping tab entry to the existing Express mode bulk import rule, the new entry gets added as the final row in the tab. The entries in this table are supposed to be a hierarchy, but there is no mechanism to move entries up or down in the table. The final row in the Mapping tab is supposed to be the row that contains your default * * values. If additions are made to this table for Marcive processing purposes, libraries are advised to delete and re-add the default * * entry so that it is the final row.

Marcive profile information for this option:

Libraries electing to use this option should ask Marcive to change their profile to use 049 \$l data that represents the Voyager item type abbreviation rather than the DRA material type code. See <http://www.ilcso.uiuc.edu/Web/voyager/general/020531_oclc_dataentry.html> for the list of item type codes. Unless the library wants other Marcive profile changes, this should be the only profile change needed for this load option.

The library should also ask Marcive to supply ILC SO with a set of test records that contain the new profile data.

WRO requirements for this option:

After you receive approval from Marcive for your profile changes, file a WRO and enter the following information as appropriate for your library:

Name of the bulk import data file: enter Marcive

Bulk import rule code (case sensitive): enter the actual SysAdmin bulk import rule code to be used to process the Marcive dataset. For example, enter EXPRESS or MARCIVE

NOTE: It is the library's responsibility to make sure that the required SysAdmin data entry is in place and accurate before the WRO is filed.

OK to export field: select Yes if you want the bib records from your Marcive loads to be backloaded to OCLC (once that process has been established). Select No if you do not want your Marcive bibs to be backloaded to OCLC.

One-time or recurring load field: select Recurring load.

Click the Next button to display the Notes field.

In the Notes field, include the text "Resume loading Marcive records beginning with <date>." Most ILC SO libraries had the March 2002 datasets as their last Marcive load into DRA, and so would resume their loads into Voyager with the April 2002 data.

No additional WRO Notes information is needed for this option.

Option 2: Load a single Marcive dataset per library per month; create a bib record ONLY (no MFHD or item record) for each Marcive record.

Some libraries may wish to load only the Marcive bib records for all Marcive records received, but not to create MFHDs and item records as part of bulk import. The library would manually add MFHDs and item records via the Voyager Cataloging client after the bib records have been loaded.

In ILCSO's inquiries to other Voyager Marcive customers, several of them indicated that adding MFHDs and item records manually via the Cataloging client was less work (i.e., fewer keystrokes) than editing an existing MFHD to add an 852 \$k. These libraries established a specific MFHD template(s) for their Marcive processing, and also set up unique item record defaults in the staff member's Cataloging preferences for this task.

In this workflow, the staff member adds a new MFHD using the Marcive template that provides the desired location in 852 \$b, the call number prefix in 852 \$k, and the call number hierarchy pulls in the SuDoc number from the bib. The MFHD fixed fields can also be customized in the template.

The staff member creates a new MFHD using the template and saves to the database, usually with no additional manual data entry needed. Then the staff member adds a new item record, and the Preferences are set to input the appropriate permanent location, item type, copy number and any other item information that can be included in the Item defaults settings. The staff member then just needs to scan or type in the item barcode number and save the item record to the database.

The library may load these records using either the No Holdings mode or No Holdings Replace mode bulk import rule. This is the library's decision to make. In both of these bulk import rules, if an incoming bib record does not match an existing bib record, the incoming record is added to the database. In No Holdings mode, if the incoming bib record matches an existing record in the database, the incoming record is rejected by the loader and a message is included in the log file. In No Holdings Replace mode, if the incoming bib record matches an existing record in the database, the content of the existing record is replaced/overlaid with the content of the incoming record.

SysAdmin requirements for this option:

Libraries must have in place the No Holdings or No Holdings Replace bulk import rule in CAT SysAdmin. See the ILC SO SysAdmin document pages CAT 23-26 for details on these bulk import rules. These are the same bulk import rules as used by ILC SO for OCLC transactions, so if the library already has created a No Holdings mode or No Holdings Replace bulk import rule, no changes to those bulk import rules should be necessary for this option.

Marcive profile information for this option:

Libraries electing to use this option should ask Marcive to change their profile to accommodate the choice of modes. For No Holdings mode, Marcive should be asked to add 049 \$m NO to each record. For No Holdings Replace mode, Marcive should be asked to add 049 \$m NO \$r REP to each record.

In addition, libraries may optionally wish to ask Marcive to exclude any 049 \$l and \$p data that was in their previous Marcive profile, since this information will not be needed in either No Holdings or No Holdings Replace modes. The 049 \$l and \$p data in conjunction with 049 \$m does not interfere with Marcive data loading in No Holdings or No Holdings Replace mode, so if the library wishes to retain either or both 049 \$l or \$p, it should not cause a problem for the loader. However, the presence of 049 \$l and \$p and \$m data may cause confusion for staff who will see these subfields retained in the bib record once it has been loaded into the Voyager database.

The library should also ask Marcive to supply ILC SO with a set of test records that contain the new profile data.

WRO requirements for this option:

After you receive approval from Marcive for your profile changes, file a WRO and enter the following information as appropriate for your library:

Name of the bulk import data file: enter Marcive

Bulk import rule code (case sensitive): enter the actual SysAdmin bulk import rule code to process the Marcive dataset. For example, enter NOHOLD or NOHLDREP

NOTE: It is the library's responsibility to make sure that the required SysAdmin data entry is in place and accurate before the WRO is filed.

OK to export field: select Yes if you want the bib records from your Marcive loads to be backloaded to OCLC (once that process has been established). Select No if you do not want your Marcive bibs to be backloaded to OCLC.

One-time or recurring load field: select Recurring load

Click the Next button to display the Notes field.

In the Notes field, include the text “Resume loading Marcive records beginning with <date>.” Most ILCSO libraries had the March 2002 datasets as their last Marcive load into DRA, and so would resume their loads into Voyager with the April 2002 data.

No additional WRO Notes information is needed for this option.

Option 3: Load multiple Marcive datasets per library per month; create bib record, MFHD, and item record for some Marcive titles, and bib records only for other Marcive titles.

Libraries may wish to have some of their Marcive records loaded using No Holdings or No Holdings Replace mode and other Marcive records loaded using Express mode. This option would require the library to change their Marcive profile to separate out the appropriate records into different datasets, which would be loaded separately using different bulk import rules.

An example of this option might be for libraries that do not use a call number prefix for their “book” Marcive materials, but who do use a call number prefix for other physical formats (e.g., MICRO.) The book materials would be sent to ILCSO in a separate dataset from the microform materials. The book materials would be loaded using Express mode and thus generate bibs, MFHDs and item records. The microforms would be sent to ILCSO in a separate dataset and would be loaded using either No Holdings mode or No Holdings Replace mode, with the library staff adding MFHDs and item records to these titles manually via the Cataloging client.

Another example for this option would be for libraries that subscribe to Marcive’s Changed bibliographic record service. The library may use Express mode to load all or a part of the regular GPO records, and use No Holdings Replace mode to load the changed bib records.

For the records to be loaded using the Express mode bulk import rule, see the information in Option 1 above about limitations with the current bulk import functionality, and workflow considerations.

For the records to be loaded using No Holdings or No Holdings Replace mode, see the information in Option 2 above about workflow considerations.

SysAdmin requirements for this option:

For the records that will be loaded to create bibs, MFHDs and item records, the existing Express mode bulk import rule may need to be edited to add Mapping tab entries applicable for the library's Marcive profile. Libraries will need to have an entry in their Express mode bulk import rule, Mapping tab, that maps each unique combination of 049 \$a <OCLC holding code> \$l <Voyager item type abbreviation> to the appropriate Voyager location and item type.

See the SysAdmin requirements section for Option 1 above for more details on editing an existing Express mode or creating a new bulk import rule for this option.

For the records that will be loaded to create bibs only, libraries must have in place the No Holdings or No Holdings Replace bulk import rule in CAT SysAdmin. See the ILC SO SysAdmin document pages CAT 23-26 for details on these bulk import rules. These are the same bulk import rules as used by ILC SO for OCLC transactions, so if the library already has created a No Holdings mode or No Holdings Replace bulk import rule, no changes to those bulk import rules should be necessary for this option.

Marcive profile information for this option:

Libraries that need their datasets split will need to work with Marcive to change their profile. Marcive charges the library a one-time \$250 processing fee for each split dataset. For example, if your library currently receives a single Marcive dataset per month, and you wish to change your profile so that you receive a monograph dataset and a microform dataset each month, Marcive will assess a \$250 fee. If your library goes from one dataset to three datasets per month, Marcive will assess a \$500 fee. Any questions about Marcive charges should be directed to representatives from that company.

Libraries that will use Express mode on any dataset will need to ask Marcive to change their profile to use 049 \$l data that represents the Voyager item type abbreviation rather than the DRA material type code. See http://www.ilcso.uiuc.edu/Web/voyager/general/020531_oclc_dataentry.html for the list of item type codes.

Libraries electing to use either No Holdings or No Holdings Replace modes should ask Marcive to change their profile to accommodate the choice of modes. For No Holdings mode, Marcive should be asked to add 049 \$m NO to each record. For No Holdings Replace mode, Marcive should be asked to add 049 \$m NO \$r REP to each record.

In addition, for datasets to be loaded using either No Holdings or No Holdings Replace modes, the library may optionally wish to ask Marcive to exclude any 049 \$l and \$p data that was in their previous Marcive profile, since this information will not be needed in either No Holdings or No Holdings Replace modes. The 049 \$l and \$p data in conjunction with 049 \$m does not interfere with Marcive data loading in No Holdings or

No Holdings Replace mode, so if the library wishes to retain either or both 049 \$l or \$p, it should not cause a problem for the loader. However, the presence of 049 \$l and \$p and \$m data may cause confusion for staff who will see these subfields retained in the bib record once it has been loaded into the Voyager database.

The library should also ask Marcive to supply ILCSO with a set of test records that contain the new profile data.

WRO requirements for this option:

After you receive approval from Marcive for your profile changes, file a WRO for each dataset to be received from Marcive. The notification that Marcive sends to ILC SO when data is ready to be retrieved via FTP usually indicates the types of records included in each dataset. For each WRO, enter the following information as appropriate for your library:

Name of the bulk import data file: enter Marcive <and the type of records in the dataset>

Bulk import rule code (case sensitive): enter the actual SysAdmin bulk import rule code to process the Marcive dataset. For example, enter EXPRESS or MARCIVE or NOHOLD or NOHLDREP

NOTE: It is the library's responsibility to make sure that the required SysAdmin data entry is in place and accurate before the WRO is filed.

OK to export field: select Yes if you want the bib records from your Marcive loads to be backloaded to OCLC (once that process has been established). Select No if you do not want your Marcive bibs to be backloaded to OCLC.

One-time or recurring load field: select Recurring load

Click the Next button to display the Notes field.

In the Notes field, include the text "Resume loading Marcive records beginning with <date>." Most ILC SO libraries had the March 2002 datasets as their last Marcive load into DRA, and so would resume their loads into Voyager with the April 2002 data.

No additional WRO Notes information is needed for this option.

For example, Library A loads their regular monograph Marcive records with Express mode and their microforms with No Holdings Replace mode. This library will file two WROs that might look like this:

WRO #1:

Bulk import data file: Marcive monographs

Bulk import rule code: EXPRESS

OK to export: Yes (or No, as applicable)

Recurring load

Notes: Resume loading Marcive records with the April 2002 data.

WRO #2:

Bulk import data file: Marcive microforms

Bulk import rule code: NOHLDREP

OK to export: Yes (or No, as applicable)

Recurring load

Notes: Resume loading Marcive records with the April 2002 data.

Option 4: Load single OR multiple Marcive datasets per library per month; bib record and MFHD created, including call number prefix, but no item record.

Voyager has a bulk load program called Prebulk that can load bibs and create and load MFHDs with some customized values, including call number prefixes. However, Prebulk does NOT offer the option to create item records. Staff who are interested in Prebulk can read more about it in Chapter 9 of the *Voyager 2001.1 Technical User's Guide*.

Use of Prebulk for Marcive records requires that ILCSO programmers create a customized Prebulk configuration file for each dataset. This configuration file is what is used by the Prebulk process to create the MFHD, including mappings for location code, call number hierarchy, and call number prefixes. There are limitations to what can be included in the Prebulk configuration files, but ILCSO tests show that a basic MFHD, including a call number prefix, can be created by this process.

An example of this option might be for libraries that use a single call number prefix for all of their Marcive materials (e.g., DOC.). The Marcive records would be loaded using Prebulk, which will create the bibs and MFHDs, and library staff would add item records to these titles manually via the Cataloging client, after the bibs and MFHDs are loaded into the database.

Prebulk can also be used to create different call number prefixes on different records. If the dataset from Marcive contains different prefixes on different records within the dataset, this single dataset can be loaded with a single Prebulk configuration file. There

should not be need to split the datasets to accommodate the use of different prefixes. However, libraries should consult with their Marcive representative on the potential for creating different prefixes within a single dataset, as this may involve other Marcive profile changes.

Prebulk requires that the actual call number prefix(es) be included within the bib record. Prebulk does not offer functionality that will map a call number prefix based on a particular 049 \$a code, for example. Because of this, libraries who use this option will need to change their Marcive profile so that the desired prefix is included in the 049 \$q subfield (that's a q as in "quick") in each bib record.

NOTE: Prebulk requires that all variable data used to create the MFHD (except the call number) is found within the same MARC field in the bib record. Since ILC SO libraries are already using the 049 field for various local holdings data, we will use the 049 field for Prebulk processing as well.

Prebulk requires that the location information be mapped from a value in the bib record to an 852 \$b location code. Since ILC SO libraries are using 049 \$a for this mapping for other bib loads, this will be the default for Marcive loads using Prebulk. In the WRO, the library must supply the 049 \$a code that is used in their Marcive profile, and supply the corresponding Voyager location code (not location name) that will be mapped into the 852 \$b. Prebulk can process a single dataset that contains different values in 049 \$a, so separate datasets should not be needed to accommodate different MFHD location values.

Prebulk requires each configuration file to include a call number hierarchy, if the call number is to be copied from the bib record into the MFHD. For Marcive records, the default call number hierarchy to be used by ILC SO will be 086, 050, 082. If your library needs a different call number hierarchy for any Prebulk configuration file, that information must be included in the WRO.

ILCSO will use the MFHD standard, as supported by Voyager, for setting the MFHD 852 first indicator via Prebulk. The indicators will be set as follows:

Bib call number field	852 first indicator
050	0
090	0
082	1
092	1
060	2
096	2
086	3
099	8
(any others)	8

Prebulk requires that the configuration file(s) include 008 (fixed field) values. The default to be used by ILCSO programmers will be the same default values that are supplied by Voyager when you add a new MFHD within the Cataloging client (see below). If your library requires a different set of 008 field values, it is the library's responsibility to include those values in the WRO.

Prebulk does support functionality that allows a different set of 008 field values to be used based on the bib record's type and bib level codes. For example, if the library wants to use one set of 008 field values for monographs and a different set of values for serials, this can be accommodated within a single Prebulk configuration file. It is the library's responsibility to include this information in their WRO, including the actual values to be used for the 008 fields.

The default 008 values to be used in Prebulk are:

Receipt status = 4
Method of acquisition = u
Cancellation date = <4 blanks>
General retention policy = 8
Specific retention policy – policy type = <blank>
Specific retention policy – number of units = <blank>
Specific retention policy – unit type = <blank>
Completeness = 1
Number of copies = 001
Lending policy = u
Reproduction policy = u
Language = <blank>
Copy report = 0
Date of report = 901128

Prebulk does not offer the ability to change the MFHD leader values that are supplied by the program. These values are:

Record status = c

Type of record = x or y (this value will be set to y if the bib record has a value of “s” in the bib level, otherwise it will be set to x)

Encoding level = <blank>

SysAdmin requirements for this option:

Since the Prebulk configuration file and processing creates the actual MFHD, the only SysAdmin requirement is a bulk import rule. ILCISO options are either No Holdings mode or No Holdings Replace mode. See the ILCISO SysAdmin document, pages CAT 23-26 for details on these bulk import rules. These are the same bulk import rules as used by ILCISO for OCLC transactions, so if the library already has created a No Holdings mode or No Holdings Replace bulk import rule, no changes to those bulk import rules should be necessary for this option.

It is the library’s decision to make on which bulk import rule should be used. In both of these bulk import rules, if an incoming bib record does not match an existing bib record, the incoming record is added to the database. In No Holdings mode, if the incoming bib record matches an existing record in the database, the loader rejects the incoming record and a message is written to the log file. In No Holdings Replace mode, if the incoming bib record matches an existing record in the database, the content of the existing record is replaced/overlaid with the content of the incoming record.

NOTE: there is a difference in functionality when using No Holdings or No Holdings Replace mode in conjunction with Prebulk, from the way both of these modes operate with non-Prebulk loads. For both of these modes, when the incoming bib is either rejected as a duplicate or the existing bib is replaced, the MFHD that is created by Prebulk is added to the existing bib record. This could result in duplicate MFHDs attached to the bib record. In other words, there is not really a “No holdings” part to this process. A MFHD will be created and added to the database in either case; the difference is whether the bib record is rejected as a duplicate (by No Holdings mode) or the existing bib is replaced (by No Holdings Replace mode).

A workflow consideration for this “feature” of Prebulk is to examine the log file from each load, and to check the database for duplicate MFHDs for any bib records marked as either rejected or replaced. The Prebulk log files contain essentially the same information as do the log files from other bulk import processes, including OCLC loads.

Marcive profile information for this option:

Libraries electing to use either No Holdings or No Holdings Replace modes should ask Marcive to change their profile to accommodate the choice of modes. For No Holdings mode, Marcive should be asked to add 049 \$m NO to each record. For No Holdings Replace mode, Marcive should be asked to add 049 \$m NO \$r REP to each record.

In addition, for datasets to be loaded using either No Holdings or No Holdings Replace modes, the library may optionally wish to ask Marcive to exclude any 049 \$l and \$p data that was in their previous Marcive profile, since this information will not be needed in either No Holdings or No Holdings Replace modes. The 049 \$l and \$p data in conjunction with 049 \$m does not interfere with Marcive data loading in No Holdings or No Holdings Replace mode, so if the library wishes to retain either or both 049 \$l or \$p, it should not cause a problem for the loader. However, the presence of 049 \$l and \$p and \$m data may cause confusion for staff who will see these subfields retained in the bib record once it has been loaded into the Voyager database.

Libraries wishing to use the Prebulk option so that call number prefix(es) are generated should ask Marcive to place the desired call number prefix in the 049 \$q (as in “quick”) in each bib record, as appropriate.

It is possible that that Marcive profiling changes will require a dataset split. If this is the case, the library should be aware that Marcive charges the library a one-time \$250 processing fee for each split dataset. Any questions about Marcive charges should be directed to representatives from that company.

The library should also ask Marcive to supply ILC SO with a set of test records that contain the new profile data.

WRO requirements for this option:

After you receive approval from Marcive for your profile changes, file a WRO for each dataset to be received from Marcive. The notification that Marcive sends to ILC SO when data is ready to be retrieved via FTP usually indicates the types of records included in each dataset. For each WRO, enter the following information as appropriate for your library:

Name of the bulk import data file: enter Marcive <and the type of records in the dataset, if there will be multiple datasets to be loaded with Prebulk>

Bulk import rule code (case sensitive): enter PREBULK and the actual SysAdmin bulk import code to be used to process the Marcive dataset. For example, enter PREBULK and NOHLDREP

NOTE: It is the library's responsibility to make sure that the required SysAdmin data entry is in place and accurate before the WRO is filed.

OK to export field: select Yes if you want the bib records from your Marcive load to be backloaded to OCLC (once that process has been established). Select No if you do not want your Marcive bibs to be backloaded to OCLC.

One-time or recurring load field: select Recurring load

Click the Next button to display the Notes field.

In the Notes field, include the text "Resume loading Marcive records beginning with <date> using the Prebulk option." (Most ILC SO libraries had the March 2002 datasets as their last Marcive load into DRA, and so would resume their loads into Voyager with the April 2002 data.)

You must also include in the Notes field the needed information for each Prebulk configuration file. An example for Library C:

For our Prebulk configuration file, use the following:

049 \$a ABCD should map to 852 \$b govdoc
049 \$a ABCF should map to 852 \$b microforms
Use default call number hierarchy
Use default 008 values in the MFHD

Another library's profile can be more complicated than the example above, of course. If you need assistance in filing the WRO, contact Casey Sutherland at the ILC SO Office for assistance.

Load option summary

As seen from the above examples, there are several options available to each library. ILCSO is not recommending any particular option over another. The library's needs and workflow considerations should be the factors that determine which option is used.

Libraries also have the option to use a mixed bag approach. The options described above are not mutually exclusive. For example, Library D may wish to load all of their Marcive non-book materials using Prebulk (described in option 4) but use Express mode for all of their book materials (described in option 1). This is certainly possible, assuming that the library works with Marcive to split the records into different datasets.

Getting help

For questions about anything in this document, or Marcive record loading in general, contact Casey Sutherland at the ILCSO Office for assistance.

For questions about a specific Marcive profile, or Marcive cost information, contact your Marcive representative.