Approaches & Tools for Global Database Maintenance in the Voyager Catalog

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Reasons for Global Database Maintenance

- Replace older records with newer records
  - AACR2 vs. RDA
  - Add faceted subject Headings
- Replace minimal level records with full/fuller level records
  - PDA Project records
- Replace unwanted, incorrect, obsolete, or inappropriate data
- Remove records from catalog
  - Subscription is not renewed
Identify Records

* Plan ways to identify records for database maintenance
  * Plan before/during cataloging/import
    * 793 field data
    * 830 field data
    * 852 field: subfield k data (Prefix)
    * Operator IDs in Carli WRO
  
* Plan post-cataloging/import
  * Target specific strings of data via Access queries
  * Study shared queries on Carli website
    * Bibliographic records: subject headings
Access Queries Examples

**BIB_INDEX**
- BIB_ID
- INDEX_CODE
- NORMAL_HEADING
- DISPLAY_HEADING

**BIB_TEXT**
- BIB_ID
- AUTHOR
- TITLE
- TITLE_BRIEF
- UNIFORM_TITLE
- EDITION

<table>
<thead>
<tr>
<th>Field</th>
<th>Table</th>
<th>Sort</th>
<th>Show</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_Heading</td>
<td>Title_Brief</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Author</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Imprint</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NORMAL_HEADING</td>
<td>BIB_INDEX</td>
<td></td>
<td></td>
<td>Like &quot;<em>immigra</em>&quot;</td>
</tr>
<tr>
<td>BIB_INDEX</td>
<td></td>
<td></td>
<td></td>
<td>Like &quot;6*&quot;</td>
</tr>
</tbody>
</table>

Design view
Series search SQL plus bib ID number _AHIV_
Database Maintenance Tools

* Run locally:
  * Pick and Scan
  * Location Changer
  * Catalogers Toolkit, Correction Review, Correction Receiver
  * MarcEdit
  * Macro Express

* CARLI completes:
  * Customizations
  * Record updates
  * Automating frequent loads

Pick and Scan

* Feature within the Voyager Cataloging and Circulation Clients
* Processes records in batch or individually
  * Item records required
  * Runs on barcodes or record ids
  * 500 or less works best
  * Logs OCLC numbers for deletes and suppresses
* Deletes items, empty MFHDs, and empty bibs

* Edits item records:

![Pick and Scan interface](image)
* Edits MFHDs’:

* Edits Bibs’:
Gary Strawn’s program works alongside Voyager Cataloging

Features beyond those in Pick and Scan:
- Deletes MFHDs and bibs with no items
- Processes really big batches
- Edits public notes (MFHD 852 $z)

Requirements:
- Oracle/ODBC setup
- Runs locally overnight
Location Changer
Gary Strawn’s trio batch updates obsolete authorities in bibs

- Main access points and subdivisions
- Changes only 1 thesaurus (ex. LC, MeSH)

Use with Cat6 report

- See Refs with Linked Bib Records report
- Identifies obsolete access points in bibs
MarcEdit

* Terry Reese’s program provides a way to externally work with a file of metadata in batch
  * Review record sets
  * Automate the editing of record sets
  * File an “Other” Work Request Type for CARLI to extract records from your database
Linked data in MarcEdit

- On the MarcEdit home page
  - Choose MarcNext
  - Choose Link identifiers
- On the Build Linked Records page
  - Enter the source and the output files
Linked data in MarcEdit

The Linked Data Tool has been designed to loop through a set of MARC records and resolve access points in the 1xx, 6xx, and 7xx data elements to their linked data end-points.

Source File:

Save File:  [MarcEditor]

ID Services

- U.S. Library of Congress (id.loc.gov)
- AutoDetect Subject ID
- OCLC VIAF  LC (NACO)
Input file in marc format has linked data

Output file in mrk format enables viewing linked data in records
MarcEdit

=538 \$aMode of access: World Wide Web.
=588 \$aDescription based on title page of print version.
=650 \$aMilitary history$vEncyclopedias.$0http://id.loc.gov/authorities/subjects/sh2010101766
=650 \$aMilitary history, Ancient$vEncyclopedias.
=650 \$aMilitary history, Modern$vEncyclopedias.
=655 \$aElectronic books.
=700 1\$aDavis, Paul K.,$d1952-$seeditor.$0http://id.loc.gov/authorities/subjects/sh2010101766
=700 1\$aHamilton, Allen Lee,$seeditor.$0http://id.loc.gov/authorities/subjects/sh2010101766
Macros Express

- Windows software, automates human keystrokes within the Voyager clients
  - Automates repetitive tasks 1.5-2 times faster
  - Runs on a file of record ids
  - Best for small batches
  - Best for simple changes
CARLI Batch Load Customizations

* Request customized adds, edits, or deletes when filing a WRO
* Email support@carli.Illinois.edu to discuss the possibilities

CARLI Batch Load Customizations

**Add**
- Custom local fields
- OK to export flag
- RDA fields ex. 336, 337, 338
- 655 genre headings
- 852 $b location
- 852 $h, $i call number
- 852 $k call number prefix
- 852 $t MFHD copy number
- 856 $u proxy
- 856 $y link text
- 856 $z public note
- 856 $3 materials specified
- Item copy number
- Distinctive operator ID
- Other special requests

**Edit**
- Format data
- LCCNs for incorrect formats (move to 010 $z)
- ISBNs for incorrect formats (move to 020 $z)
- OCLC numbers adjusted to standard format: (OCoLC)ocm, ocn, on
- Bib fields and OK to export function noted in the Add column
- Changed 856 URLs
- Other special requests

**Delete**
- Second, unprefixes OCLC number
- Specified 655 genre headings
- Specified 856 fields
- 245 $h GMD
- Other specified bib fields by request
- Collections of Bibs and/or MFHDs (Voyager bulk import cannot delete items)
- Specified bibs in files from WorldShare's Record Updates Service (Bib Notification)
How CARLI Loads Electronic Record Updates

**If URLs changed, or you are uncertain**
- CARLI creates MFHDs
- Updated bibs are interleaved with created MFHDs
- Interleaved file is loaded using No Holdings Replace Mode (or Unicode version)
- Existing bibs/MFHDs are replaced

**If no URLs changed:**
- CARLI only loads updated bibs
- Bibs are preferably loaded with No Holdings Replace Mode (or Unicode version)
- If other bulk import rules are used, DO NOT select “Create PO/MFHD/item for existing Bibs”
- Existing bibs replace
Automate Your Frequent Record Loads

**From OCLC**
- CARLI can automate retrieving your OCLC ftp files
- Scripts pick up yesterday’s files
- Watch for OCLC file notification emails. If OCLC gets behind, files are skipped.
- Retrieved files are loaded according to WRO specifications

**From Other Vendors**
- Upload files to your CARLI ftp
- CARLI scripts pick up files with consistent file name + unique portion
- Retrieved files are loaded according to WRO specifications
Wrap up

* Document questions, concerns, and issues and why
* Keep a separate list of questions to send to CARLI

Questions
Thank You

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