Loading Bibliographic Records for the Springer Medicine eBook Collection 2005-2010 into I-Share Voyager Databases
(CARLI Office, February 2010)

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Overview

CARLI purchased the Springer Medicine eBook Collection, on behalf of all CARLI libraries, as a replacement for the discontinued subscription to the Mary Ann Liebert journals. Access to the Springer Medicine eBooks was activated in January 2010. This document is intended to detail for I-Share libraries the various Voyager load options for the bibliographic records that correspond to the Springer Medicine eBook Collection (hereafter referred to as the "Springer Med" collection).

Because of better quality records as well as duplicate detection control, CARLI has opted to get the MARC records for the Springer Med collection from OCLC's WorldCat Collection Set service rather than directly from Springer. CARLI's order with OCLC for the Springer Med collection includes the initial file of all Springer Med records available at the time of the order, plus the ongoing, usually monthly, update files that Springer makes available to OCLC. The initial file for the Springer Med collection for contains 1,580 bibliographic records.

CARLI staff have summarized the separate descriptions posted by OCLC for each of the eighteen Springer eBook sub-collections that comprise their Complete collection, of which Springer Med is one sub-collection. That summary includes example bibs for each collection, counts (as of 2/15/2010) of the number of bibs in each individual collection, and summary information at the collection level about the bib record Encoding Level and percentage of records cataloged using Library of Congress subject headings. The document entitled "Collection Summaries and Example Bibliographic Records for the Springer eBook Collections" is available from the URL below.

http://www.carli.illinois.edu/mem-prod/I-Share/cat/SpringerExamples.pdf

Staff planning their library's Springer Med collection record load are strongly encouraged to review this summary as part of the local decision-making process. Note, however, that only the first section of that summary document applies to the Springer Med collection. Eleven I-Share libraries opted to purchase the Springer Complete collection, so the summary document is designed to serve multiple audiences.

CARLI staff will receive the bibs from OCLC and create scripts for the loads into the appropriate databases, based on the libraries' decisions about the various customization options as outlined in this document. It is assumed that the initial loads and the ongoing loads will use the same customization options per library, so it is important that the options be carefully considered prior to the initial load. These customization options are summarized below, with more detailed information on each option included later in this document.

While this document focuses on the Springer Med collection loads, it is also intended to be used as a conceptual guide for loading bib records representing electronic resources from vendors other than Springer into the local Voyager database. An example of this

might be for e-resource records from the vendor ebrary. A different Voyager bulk import rule (or at least different location mapping values) may be needed for e-record loads other than the CARLI Springer Med titles, but the concepts described in this document should be applicable to e-resource records from other vendors.

If this document is used as a conceptual model for loading e-records from sources other than OCLC, the document called "Best Practices for Bibliographic Records from non-OCLC Sources" should also be consulted, available from the URL below:

http://www.carli.illinois.edu/mem-prod/I-Share/cat/vendorrecs.html

The load options described below are consistent with the recommendations detailed in the "Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force Final Report" (CatER task force) available from the URL below.

http://www.carli.illinois.edu/mem-prod/I-Share/cat/archive/040419_cater_final.pdf

A concise version of the document above, containing the task force recommendations without the rationale behind each recommendation, is available from the URL below:

http://www.carli.illinois.edu/mem-prod/I-Share/cat/cater_excerpts.pdf

A new Cataloging Electronic Resources Task Force was convened in 2009 and charged with, among other things, making recommendations for any changes deemed as necessary to the document(s) above. That work is not complete at the time of this writing, but if the CatER 2009 task force report requires changes to this document, those revisions will be incorporated as appropriate.

Specifically, the load options described in this document will result in a Voyager bib and MFHD record, but no item record, being added to the local database. In addition, the load will result in the URL(s) being copied from the bib into the MFHD, per the task force recommendations. There are multiple other customizations available to I-Share libraries for these e-resource bibs, as detailed below.

The CatER Task Force final report also recommends that the library assign a location code to the MFHD that represents an electronic resource "location." This document assumes the library has already created such a location code in Voyager SysAdmin, and that this e-resource location will be used in the Voyager bulk import rule. If the library does not already have an e-resource location established in SysAdmin, it is recommended that library staff create this new location while consulting the *Voyager 7.1 System Administration User's Guide*, section entitled "Enabling the Use of a New Location" pages 10-59 through 10-61.

Load Options (Summary)

The Springer Medicine eBook loads will add a bib record and MFHD only (no item record created) for each title in the collection. By default, all 856 fields from the bib are copied to the MFHD. Other customizations are available, including options to delete 856 fields other than the one for the full-text resource, to create the MFHD call number, the addition of a library-specific proxy string to 856 subfield u, the addition/deletion of 856 subfields 3, t, y, and/or z, the addition/deletion of 655 genre headings, or the addition/deletion of other bib record fields.

NOTE: CARLI staff do not assume that all I-Share libraries want the Springer Med records loaded into the local database. Therefore, no matter which customizations the library may choose, the library's I-Share Liaison or Library Director must file an online work request (WRO) to request that the Springer Med eBook records be loaded into the local database. Use the new work request type "Voyager Bulk Import for Electronic Resources ONLY" and enter the appropriate WRO information for the desired customizations, detailed below. This new WRO form is designed to help the library think about and to specify the different customizations available for e-resource record loads.

The Springer Med collection loads require some specific settings in the library's bulk import rules in the Voyager System Administration client, described below. 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 CARLI Data Services staff receive a WRO to load the Springer Medicine eBook records into an institution's local database, the first 10 titles will be loaded, and a log file will be generated. Library staff will need to review those records for accuracy. When the library approves the 10-record load, CARLI staff will then load the remaining Springer Med records into the local database. The full load will generate an additional log file. These load log files will be placed in the library's xxxftp account on the I-Share files server (where xxx represents the library's three-character CARLI library code).

Summary of Implementation Steps

1. Review this document and the "Collection Summaries and Example Bibliographic Records for the Springer eBook Collections" document.
2. Create a specific e-resources location in Voyager SysAdmin, if needed, as recommended by the CatER Task Force.
3. Decide which Springer Med eBook load customizations will work best for your library.
4. Complete the System Administration requirements as described in this document.
5. File a WRO as described in this document for the load.
6. Review the test load of 10 records and log files.
7. Approve the 10 record test.
8. After the full load has been completed, enjoy the new Springer eBook records in your local database!

Springer Medicine eBook Collection Bib Record Load Options

Below are some options identified for loading the consortially-purchased Springer Medicine eBook Collection for 2005-2010 titles into the individual library's Voyager database. If the library has needs that are not met by one of these options, please contact the CARLI Office (support@carli.illinois.edu) to discuss your library's Springer load requirements. CARLI staff will work with your library to determine if your requirements can be met with existing Voyager bulk import functionality and/or manipulation of the bib records by CARLI staff prior to the loads.

By default, the load options are designed to use the "embedded holdings" model, whereby many of the various customizations are accounted for by adding an explicit 852 field to each bib, which is then copied into the MFHD created during the load.

IMPORTANT NOTE: CARLI staff will create the 852 (and other) fields in the library's bib records, based on the decisions specified by the library in the WRO form; it is NOT expected that the library, OCLC, or Springer will perform these customizations. In addition, if an individual library's customizations are simple enough that the load can be done using the "express mode" model, CARLI staff will take the liberty of modifying the bulk import rule as needed to simply the process.

It is <u>absolutely</u> the library's responsibility to review the sample load of 10 records carefully to make sure the records loaded are correct and meet the library's needs. However, the concept behind the new WRO form for bulk import of e-resources records is to make it easier on the library to specify their custom needs, and CARLI staff will edit the records and/or bulk import rules to implement those customizations.

Load Option Details:

Load bib record and MFHD only (no item record created); 856 field(s) from the bib is copied to the MFHD; various other customizations available.

For the Springer Med collection, details about the content of the bib records supplied via OCLC's WorldCat Collection set(s) are available via the example records that OCLC has identified on their website, and some of which are included in the "Collection Summaries and Example Bibliographic Records for the Springer eBook Collections" document posted to <http://www.carli.illinois.edu/mem-prod/I-Share/cat/SpringerExamples.pdf>.

If this document is being used a model for e-resource record loads other than the Springer Med collection, it is very important that the library staff involved in planning the record load be familiar with what data is in the bibs supplied by the vendor. This can be done by examining sample records provided by the vendor to the library, or by asking the vendor about their practices for each field described below.

The customization options below are described in the same order as they appear on the new WRO form called "Voyager Bulk Import for Electronic Resources ONLY." The details of each customization are included in this part of the documentation, so that libraries can think about their customization needs before filing the WRO for the load.

The new WRO form has a numbering convention that is designed to make it easier to reference the different options on the form. The first five entries on the WRO form are for basic processing information and do not represent customizations. Therefore, the customization options described below begin with number 6.

All options have a default setting that must be changed by the person filing the WRO, if the default does not meet a library's specific needs.

6. Bibliographic record details:

As a reminder, in keeping with the CatER task force recommendations, during the load, by default all the 856 field(s) are copied from the bib record to the MFHD. Therefore, the 856 field options described below apply to both the bib and MFHD.

6a. 856 field options:

Some of the Springer Med collection bib records contain more than one 856 field. For example, the first 856 field contains the link to the full-text online resource, while a second 856 field (if present) contains a link to the table of contents only. Some libraries may wish to retain only the 856 field in their bibs/MFHDs for the full-text link, while other libraries may wish to retain all 856 fields supplied by the vendor.

The WRO form allows a library to
- retain all existing 856 fields (the default),
- or to retain only 856 fields that have a specific combination(s) of first and second indicators,
- or to retain only 856 fields that begin with specific text (e.g., the vendor's standard core part of the URL, such as http://dx.doi.org and/or http://www.springerlink.com).

In addition, the WRO form allows the library to request that CARLI staff delete any 856 fields that contain specific text in either 856 $3 or 856 $y.

For the Springer Med collection, all bibs have at least one 856 field with indicators "40" that link to the full-text resource. Some bibs have more than one 856 field with indicators 40, for example multi-volume works.

Some of the bibs in the Springer Med collection have an 856 field with indicators "41" that points to a table of contents link provided by the Library of Congress, in addition to the link to the full-text resource. These LC table of contents URLs all contain 856 $3 text of "Table of contents only."

In addition, some of the bibs in the Springer Med collection have an 856 field with indicators "42" that points to a publisher description link and/or contributor biographical information provided by the Library of Congress, in addition to the link to the full-text resource. The LC-provided publisher description URLs all contain 856 $3 text of "Publisher description" and the biographical URLs all contain 856 $3 text of "Contributor biographical information."

For the Springer Med collection, if a library wishes to retain all full-text URLs but eliminate the links to LC's table of contents online, publisher's descriptions, and contributor information, the option to retain 856 fields based on indicator values should be selected, and "40" should be entered in the input box. This would result in any 856 fields with indicator values of 41 and 42 being excluded from the bib and MFHD.

Similarly, if the library wishes to retain all full-text URLs and table of contents links, but eliminate the links to publisher descriptions and/or contributor information, the option to retain 856 fields based on indicator should be selected, and the text "40 and 41" should be entered in the input box.

Multiple options to selectively retain/delete 856 fields can be chosen, as needed. If the library's needs can't be explained clearly by selecting options and entering the desired text in the input box, the Notes field in the WRO should be used to describe the processing desired by the library.

NOTE: If a library wants to retain all 856 fields in the bib record, but to have only selected 856 fields copied to the MFHD, CARLI staff can do this during pre-load processing, but the 856 fields must follow a predictable pattern and the library must be very specific about which 856s are to be copied to the MFHD. The library would specify this need in the Notes field of the WRO that is filed for the load.

6b. 856 subfield u (Proxy string) options:

Many libraries have proxy services (e.g., EZProxy) that support patron authentication for off-campus access to licensed/restricted online resources. If your library has such a proxy service, it is recommended that your institution-specific proxy string be pre-pended to the 856 subfield u as part of the load.

The WRO form allows a library to instruct CARLI staff to add your proxy string; be sure to enter the proxy string exactly, including punctuation and case-sensitivity (if applicable). It is also strongly encouraged that the library staff member(s) who review the test load try using the proxied URL from off-campus before approving the full load.

NOTE: If a library wants to add a proxy string to only selected URLs (e.g., to not add the proxy to URLs that represent table of contents), CARLI staff can do this during pre-load processing. The library must be very specific about which 856s are to receive the proxy

string. The library would specify this need in the Notes field of the WRO that is filed for the load.

6c. 856 subfield z (Public note) options:

Many vendors include public notes in the 856 field, to share information about the resource with patrons.

The WRO form allows a library to
- retain all existing 856 subfield z text as is (the default),
- or to delete any existing 856 subfield z text,
- or to add a new 856 subfield z with library-specific text,
- or to change any existing 856 subfield z text to different library-specific text.

For the Springer Med collection, most bibs contain an 856 for the full-text resource with $z containing the text "Restricted to SpringerLink subscribers." Some bibs have additional 856 fields (such as links to table of contents) that contain no $z text.

Because of the inconsistencies with the content of 856 $z in the Springer Med collection, it is recommended that libraries follow whatever decisions they have made for other e-resources represented in the local database, keeping in mind that the CatER task force did recommend that a statement of restriction be added to a public note field (such as the 856 $z) when access is known to be restricted. If the library wants consistent text in 856 $z for all records, the option to Change existing 856 $z text should be selected, and the exact text of the $z should be entered, including punctuation and case-sensitivity (if applicable).

6d. 856 subfield 3 (Materials specified) options:

Many vendors include a subfield 3 in the 856 field, to share alternative information about the resource with patrons.

The WRO form allows a library to
- retain all existing 856 subfield 3 text as is (the default),
- or to delete any existing 856 subfield 3 text,
- or to add a new 856 subfield 3 with library-specific text,
- or to change any existing 856 subfield 3 text to different library-specific text.

For the Springer Med collection, most bibs contain an 856 for the full-text resource with $3 containing the text "SpringerLink."

In addition, some bibs contain
- an additional 856 field for links to the Table of Contents, with $3 text of "Table of Contents only,"

- and/or an additional 856 field for links to publisher descriptions, with $3 text of "Publisher description,"
- and/or an additional 856 field for links to the author's biographical information, with $3 text of "Contributor biographical information."

Despite these inconsistencies with the content of 856 $3 in the Springer Med collection, it is recommended that libraries retain all existing 856 $3 in these records. Of course, if the library chooses to delete specific 856 fields in option 6a, and those fields also contain $3 data, the $3 data will be deleted along with the rest of the field.

6e. 856 subfield y (Link text) options:

Many vendors include a subfield y in the 856 field, to display alternative text (rather than the actual URL) with patrons.

The WRO form allows a library to
- retain all existing 856 subfield y text as is (the default),
- or to delete any existing 856 subfield y text,
- or to add a new 856 subfield y with library-specific text,
- or to change any existing 856 subfield y text to different library-specific text.

For the Springer Med collection, the bibs have no 856 $y at all.

It is recommended that libraries follow whatever decisions they have made for other e-resources represented in the local database with regard to 856 $y.

7. Bib record 655 field (genre heading) options:

Many vendors include a 655 field in e-resource bib records, to add an access point to the records. A common value for the 655 is $a Electronic books.

The WRO form allows a library to
- retain all existing 655 fields as is (the default),
- or to delete any existing 655 fields,
- or to add a new 655 field with library-specific text,
- or to change any existing 655 fields to different library-specific text.

For the Springer Med collection, all of the bibs contain at least one 655 with Indicator1 = blank, Indicator2 = 0 and $a Electronic books. A handful of the bibs contain a second 655 with other $a content.

Despite these inconsistencies with the content of the 655 fields in the Springer Med collection, unless the library wants to delete all 655 fields, it is recommended that libraries retain all existing 655 fields in these records.

8. Add a bib field(s) option:

The WRO form allows a library to specify a new bib record field(s) that should be added to all records during the load. The library must specify the field tag, both indicator values, any subfield codes and subfield text (punctuation and case-sensitive).

There is no specific recommendation on the use of this option for the Springer Med collection. Libraries should consider consistency with other records for electronic resources in the local database if this option is selected.

9. Delete a bib field(s) option:

The WRO form allows a library to specify a bib record field(s) that should be deleted from all records prior to the load. The library must specify the field tag, both indicator values (if applicable), and subfield text (punctuation and case-sensitive, if applicable).

There is no specific recommendation on the use of this option for the Springer Med collection. Libraries should consider consistency with other records for electronic resources in the local database if this option is enabled.

10. MFHD (holding record) details:

No matter which of the MFHD customizations are designated, the MFHD that is generated by the Voyager bulk import utility will contain the following default Leader and 008 (fixed field) values. These values are system-supplied and cannot be changed as part of bulk import. If the library wishes to use different MFHD Leader and 008 field values, those edits must be done from within the cataloging client after the MFHDs are created via bulk import.

Leader:

Record status = n
Type of record = x
Encoding level = 1

008 (Fixed field):

Receipt Status: 0
Method of Acquisition: u
Expected acquisition end date: ||||
General Retention Policy: 8
Specific Retention Policy - Policy type: <| No attempt to code>
Specific Retention Policy – Number of Units: <| No attempt to code>

Specific Retention Policy - Unit type: <| No attempt to code>
Completeness: 4
Number of Copies: 001
Lending policy: u
Reproduction policy: u
Language: <Obsolete Code or Value Not Set>
Copy Report: 0
Date of Report: 000000

10a. Call Number options:

The CatER task force recommendations didn't address call numbers, so the decision about whether or not to add a call number to the MFHDs for e-resource records is at the discretion of the local library. I-Share libraries have varied practices in this regard, and so there are several options available.

The WRO form allows a library to specify that
* (A) no call number is to be added to MFHDs during the load (the default),
* or (B) to copy the call number from the bib to the MFHD,
* or (C) to add the same call number text to all MFHDs added.

In addition, if the library needs a call number prefix (852 $k) added, that can be specified in the WRO.

(A) If no call number is to be added to the MFHDs, the WRO default for Add no call number to any MFHDs is retained.

(B) Some libraries may wish to have the call number in the bib record copied into the MFHD. For this option, the WRO form requires that the desired call number hierarchy from Voyager's System Administration/Cataloging be identified.

NOTE: Most (but not all) of the Springer eBook bib records have a Library of Congress call number in the 050 field (subfields a and b), and an LC-created Dewey class number in 082 $a. In addition, some (but not all) of the bib records contain a National Library of Medicine call number in the 060 field (subfields a and b). Libraries that choose the option to copy the call number from the bib into the MFHD need to be sure their desired call number hierarchy in SysAdmin includes these fields/subfields. For more information about establishing Call Number Hierarchies, see the *Voyager System Administration in I-Share Libraries: Part 6 Cataloging* document, pages 11-through 14, available from the URL below:

http://www.carli.illinois.edu/mem-prod/I-Share/secure/sysadmin/cat.pdf

(C) Some libraries may wish to have the same call number text added to all MFHDs created during the load. For this option, it is assumed the call number type will be "Other" (e.g., 852 first indicator value = 8). The WRO form requires that the desired call number text be specified, punctuation and case-sensitive.

For (B) and (C), if the library needs a call number prefix to be added to each MFHD's 852 $k, that prefix must be specified in the WRO form, punctuation and case-sensitive.

10b. 852 subfield t (copy number) options:

In keeping with the CatER task force recommendations, the load is not designed to create item records, but the MFHD standard indicates the copy number is to placed in 852 $t.

The WRO form allows a library to
- add an 852 subfield t with value 1 (the default),
- or to add an 852 subfield t with a library-specified value,
- or to not add any 852 $t at all.

It is recommended that libraries follow whatever decisions they have made for other e-resources represented in the local database. That said, there are some I-Share database cleanup projects that involve inspection of the MFHD 852 $t, so including a copy number for the Springer eBooks may reduce the number of records retrieved by those queries.

11. Item record copy number option:

The new WRO form includes an option to have a default item record copy number other than 1 applied during the load.

Libraries are encouraged to comply with the CatER task force recommendations and load only bibs and MFHDs for e-resources (and not to create item records at all). In that scenario, this option is moot and can be ignored.

SysAdmin requirements

It is assumed that I-Share libraries that choose to load the Springer Med eBook Collection will need to have some level of customizations performed by CARLI staff on the bibs prior to the load (e.g., to add the library's proxy string to the URL). Because of this assumption, the default Springer eBook bulk import rule described below will be set up using the "Embedded Holdings mode" model, whereby CARLI staff will also generate an 852 field for each bib record to accommodate the call number preferences described above. If it turns out that an individual library's customizations are not complex enough to require the "Embedded Holdings mode" model, CARLI staff will edit the library's Springer eBook bulk import rule to use the "Express Mode" model, whereby the location

mapping can be based on the 049 field instead of a custom-generated 852 field. This decision will be made by CARLI staff on a case-by-case basis, in conjunction with the overall level of customizations needed by the library.

For the Springer Med collection load, libraries will need to create a new bulk import rule in SysAdmin that creates bib records and MFHD records only.

Rule Name tab:

Rule Name: Springer Medicine (case-sensitive)
Rule Code: SPRINGER (case-sensitive)

Rule Name tab data entry, generic example:
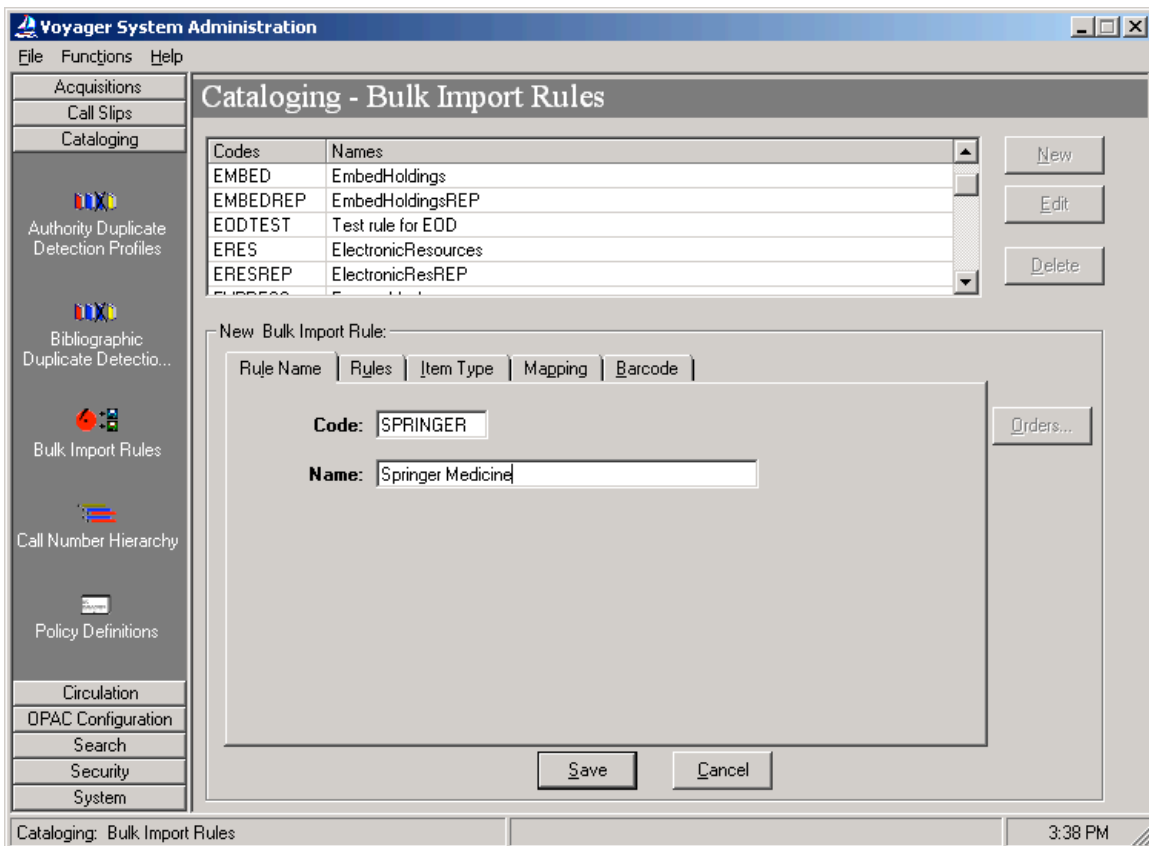
Rules tab:

Bib dup profile: select OCLCCondBulk
Auth dup profile: select AuthReplace
Owning Library: <select your library's owning library code>
MARC Character set mapping: select OCLC (non-Unicode)

Loc field: 852
Loc subfield: b
Loc indicator 1: *
Loc indicator 2: *

Click the "Bibs, MFHDs" radio button.

Check the "Create MFHD for existing Bibs" box.

Check the "Copy 852-855, 863-878 Fields from Bib to MFHD" box.

Check the "Copy 856 Field from Bib to MFHD" box.

NOTE: Checking the "Copy 856 Field…" box will copy all URL(s) from the bib into the MFHD. If the library requires any special massaging of the URL (for example, to add a library's proxy string to the beginning of the standard URL), CARLI Data Services staff can do this as part of the pre-processing of the Springer bib records. This special processing MUST be requested in the WRO that is filed for this load (see details above).

Rules tab data entry, generic example:
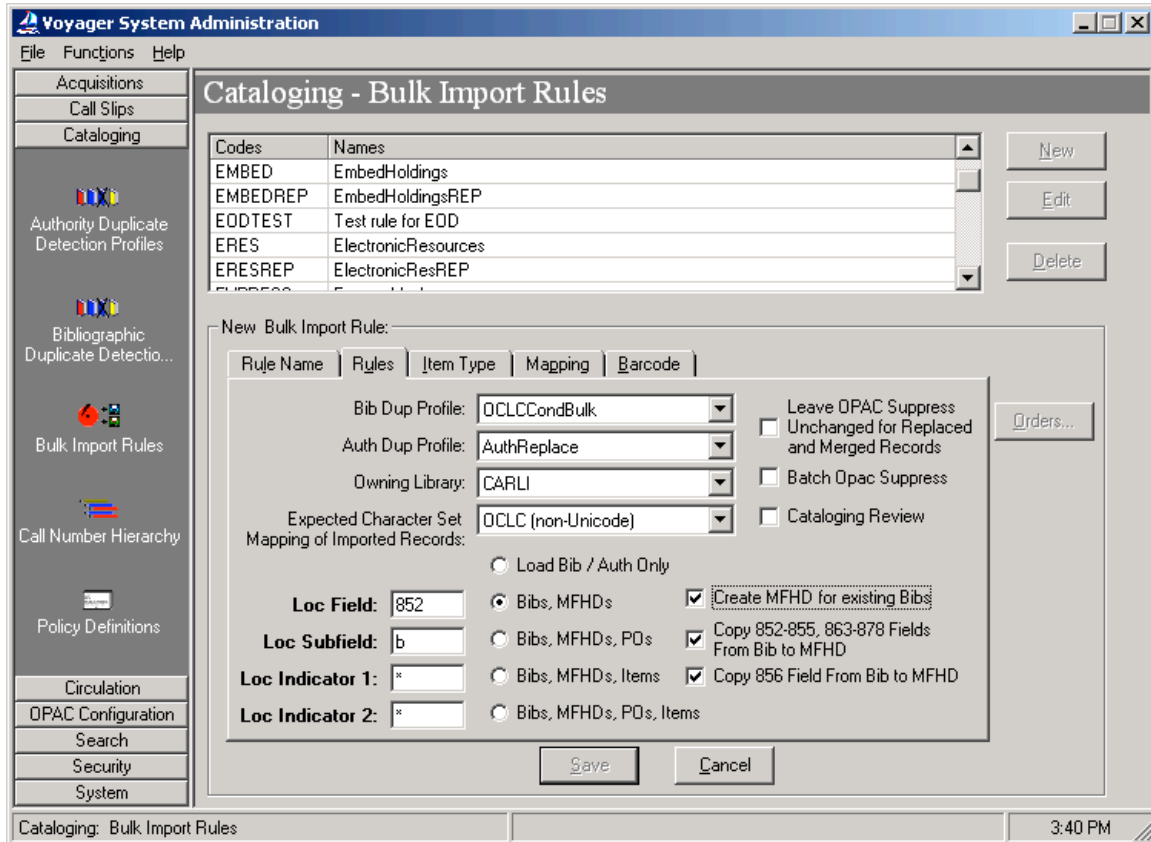
Item type tab: leave blank.

Barcode tab: leave blank.

Mapping tab:

Click Add.

MARC item type: enter an asterisk ("*")

MARC Location Code: <enter the Voyager location code (not location name), punctuation- and case-sensitive, that will be placed in the 852 $b for this load; this should be the location code for the library's e-resource location desired for this load. CARLI staff will use the value entered here when customizing the 852 field for this load.>

Voyager item type: <keep the default; this field will not be populated in the bulk load>
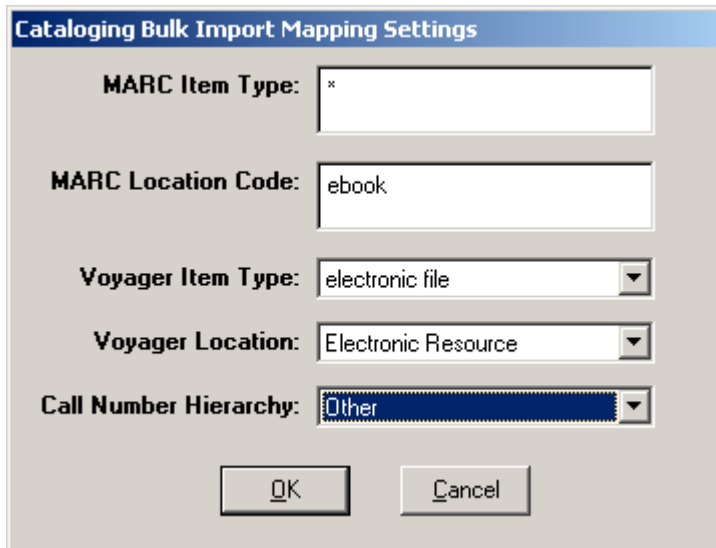
Voyager Location: select the location name for your electronic resources location that your library wishes to use for these MFHDs.

NOTE: If your library needs to add a new location to your Voyager database to accommodate the Springer eBook records, the location must be defined in SysAdmin before you can complete your bulk import rule. See the *Voyager 7.1 System Administration User's Guide,* section entitled "Enabling the Use of a New Location" pages 10-59 through 10-61, which outlines the SysAdmin steps needed when a new location is added to a database.

Call Number Hierarchy: Even though the call number will be copied into the 852 field as part of the pre-processing for this load, a value must be selected for the Call Number Hierarchy in the Mapping tab. Select the appropriate call number hierarchy here. Most Springer bib records contain a Library of Congress call number in the 050 subfields a and b, and a Dewey class number in the 082 subfield a. In addition, some (but not all) of the bib records contain a National Library of Medicine call number in the 060 field (subfields a and b). CARLI staff will use the selected Call Number Hierarchy entered here for choosing which call number to copy to the 852 $h and $i in the MFHD.

NOTE: If the library wants to use a generic call number for all MFHDs created during the load, the "Other" call number hierarchy should be selected on this screen.

The first Mapping table row, generic example:

When all values are entered, click the OK button directly underneath the Call Number Hierarchy field in the Mapping tab.

Libraries must then create a second Mapping table entry that contains an asterisk (*) in both the MARC Item Type and MARC Location Code fields. It is suggested that you use the same Voyager item type and location values as used above for this entry in the table. This entry must be the final entry in your Mapping table.

The second/final Mapping table row, generic example:

When all information has been entered completely on the Rule Name, Rules and Mapping tabs, click the Save button at the bottom of the screen.

Mapping tab entries (ready to save), generic example:

If the Save button is grayed out, this usually means that the Mapping tab doesn't have a final entry with asterisks in both the MARC item and MARC Loc fields. Go back to the Mapping tab and add this required field, and try to save the bulk import rule again.

WRO requirements

To request a Springer Med load for your database, file a WRO of type "Voyager Bulk Import for Electronic Resources ONLY" and enter the following information as appropriate for your library:

1. Name of the bulk import data file: enter **Springer Medicine**

2. Bulk import rule code (case sensitive): enter **SPRINGER**

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.

3. Is this a one-time or recurring load option: select **Recurring load**

4. Should there be an "OK to export" flag on the bibliographic record: select **Yes** so that the Springer Med bibs are marked as eligible to be backloaded to OCLC.

NOTE: CARLI staff are not making assumptions about which I-Share libraries will want the Springer Medicine bibs loaded into their Voyager database. As a result, when the order for the Springer Medicine collection was placed with OCLC by CARLI staff, no holdings were set on WorldCat at the time of the order. Therefore, backloading is the mechanism to be used to add the library's holdings for this collection to WorldCat.

5. Is it expected that all or most of the records in the input file will: select **Be added as new**

The remaining customization options on the WRO form are at the library's discretion. Please see the details about each option described above.

The screen shots below represent what is expected to be a common set of load options for the Springer Med collection eBook load.

WRO sections 1-5:

WRO section 6a:

This library wants the bib and MFHD to contain only the 856 field links to the full-text resource.

WRO section 6b:

This library requested that their proxy string be pre-pended to 856 $u. Although the screen shot below doesn't display the complete proxy string, in this example, the text entered into the WRO form was: http://library.carli.edu:2048/login?url=

WRO section 6c:

This library requested no special processing to the 856 subfield z data.
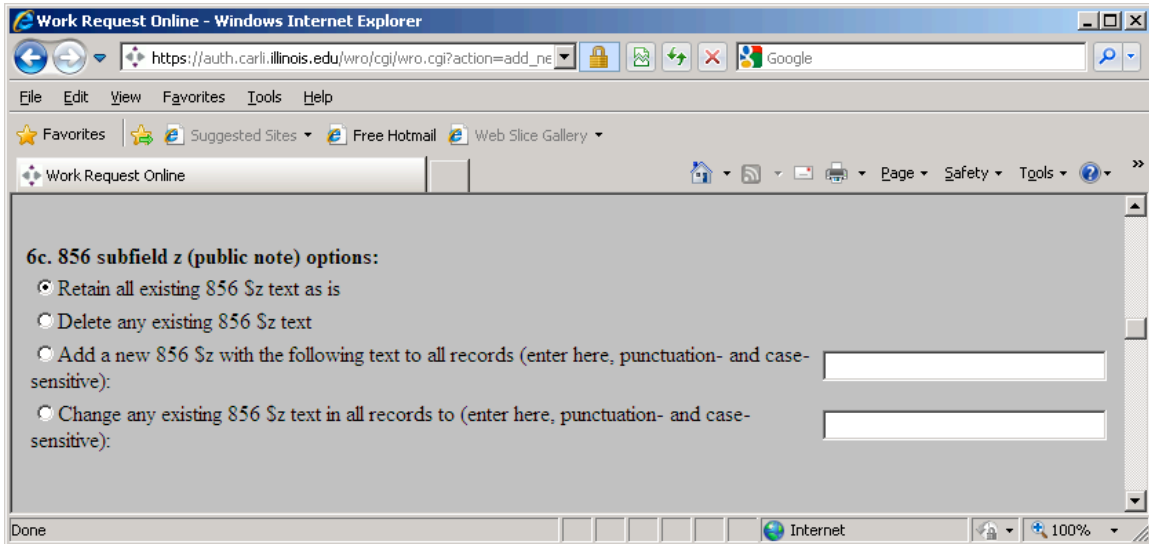
WRO section 6d:

This library requested no special processing to the 856 subfield 3 data.
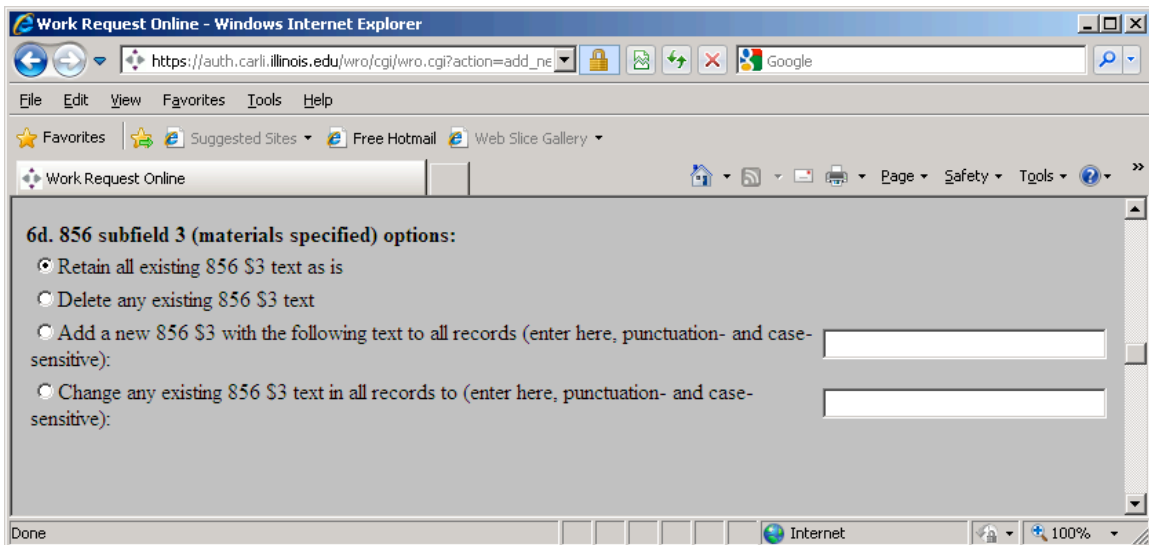
WRO section 6e:

This library requested no special processing to the 856 subfield y data. (NOTE: for the Springer Med collection, none of the bibs in the initial file have any 856 $y data.)
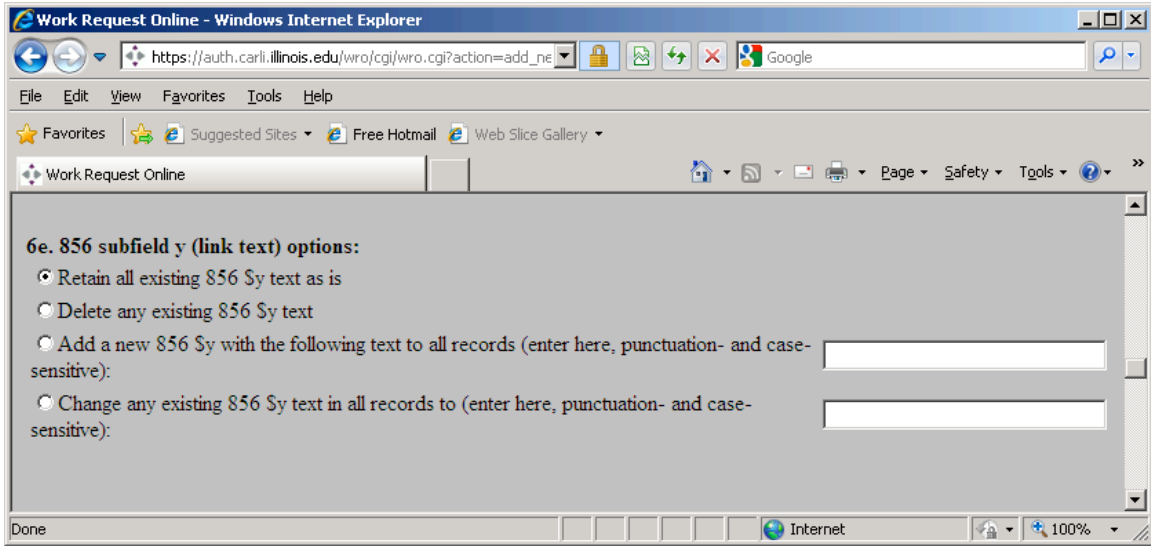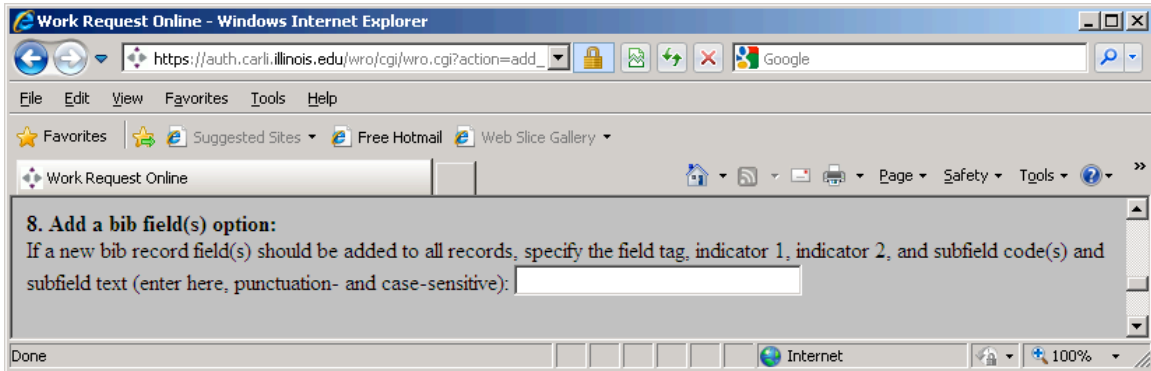

WRO section 7:

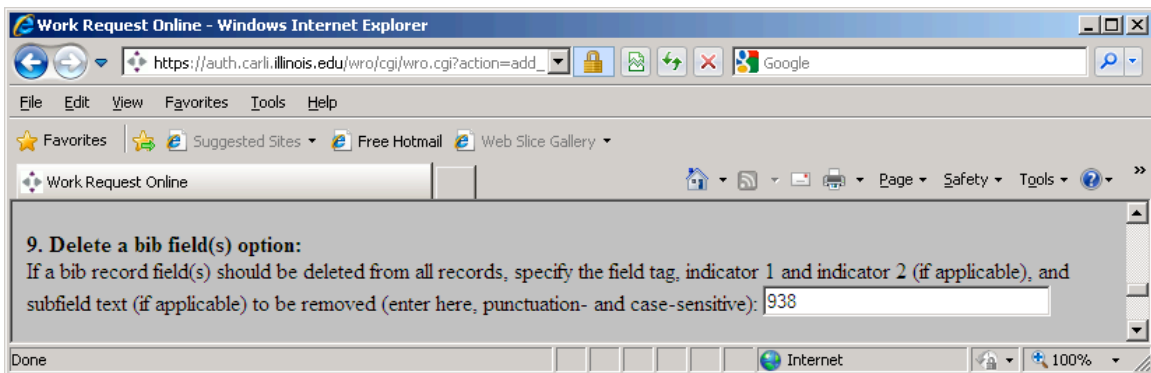This library requested no special processing to the 655 field data.
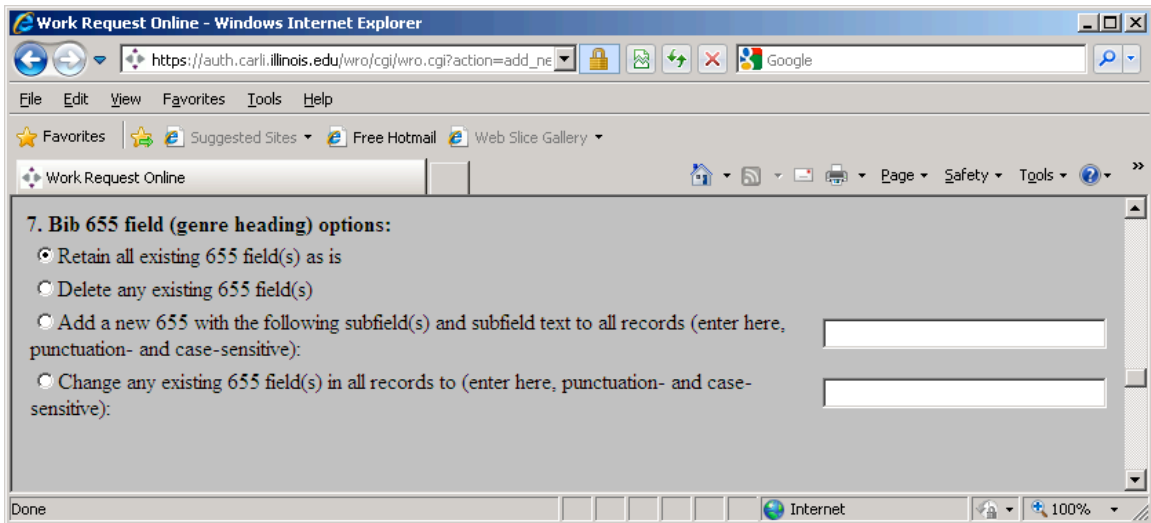
WRO section 8:

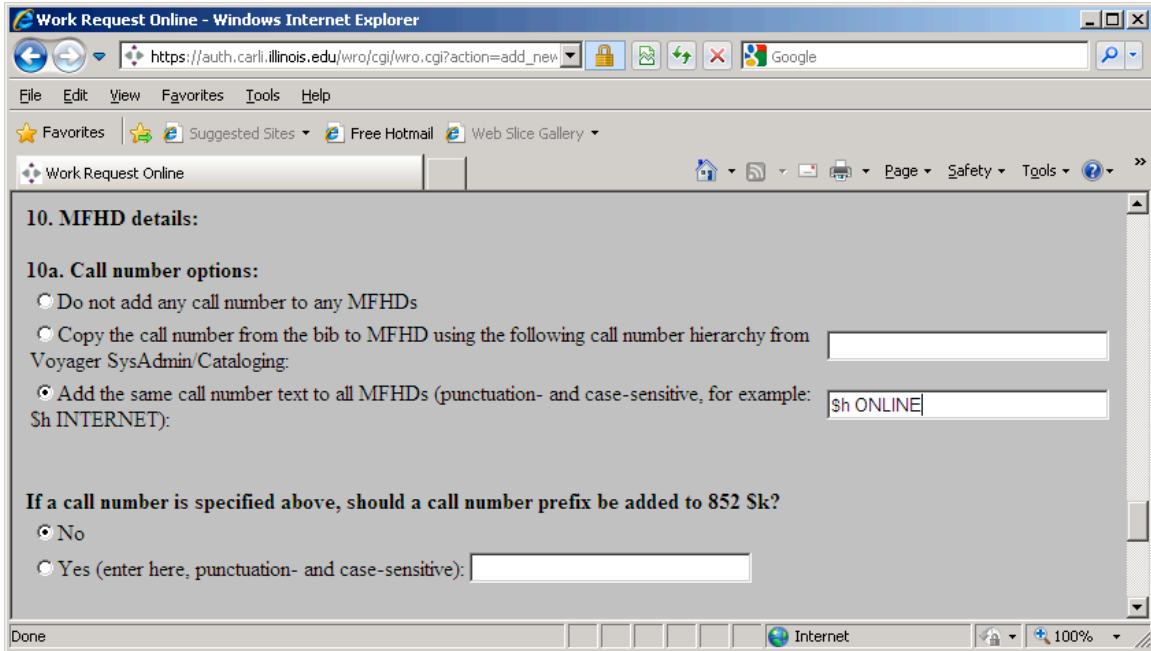This library requested no special bib record field additions.

WRO section 9:

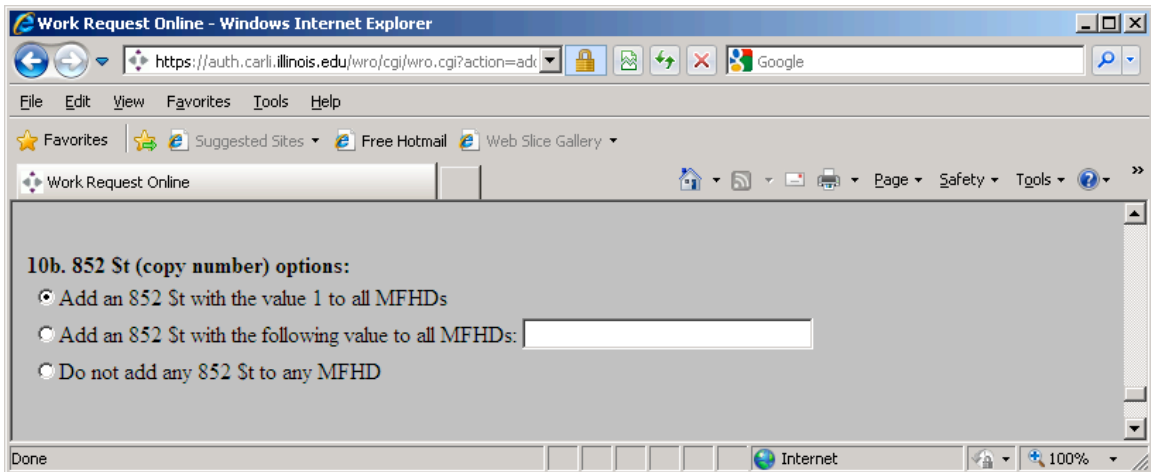This library requested that all 938 fields be deleted from the bib records.

WRO section 10a:

This library requested that the call number of "ONLINE" be added to all MFHDs created during the load, with no call number prefix.
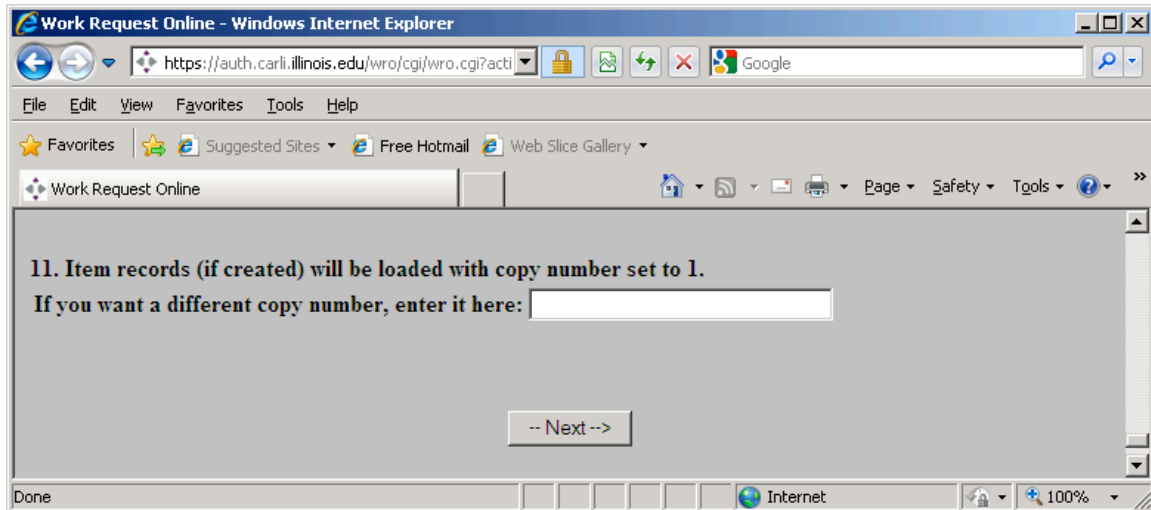

WRO section 10b:

This library requested that an 852 $t with value 1 be added to all MFHDs created during the load.

WRO section 11:

Because this library's Springer load will not be creating item records, this section of the WRO form is left blank.


Notes field: <To get to the Notes section, click Next at the bottom of the Adding a New Work Request screen>.

If the library requires any special massaging of the bibs that are NOT covered by the options described above, the person filing the WRO must add these requirements to the Notes section of the WRO.

An example would be if the library wants the Springer Med eBook load to contain only English language titles. CARLI Data Services staff can do this as part of their pre-processing of the Springer Med bib records, but this special customization MUST be recorded in the Notes field of the WRO in order to be implemented.

WRO Notes field example:

This library requested only English language materials be included in their Springer Med load.
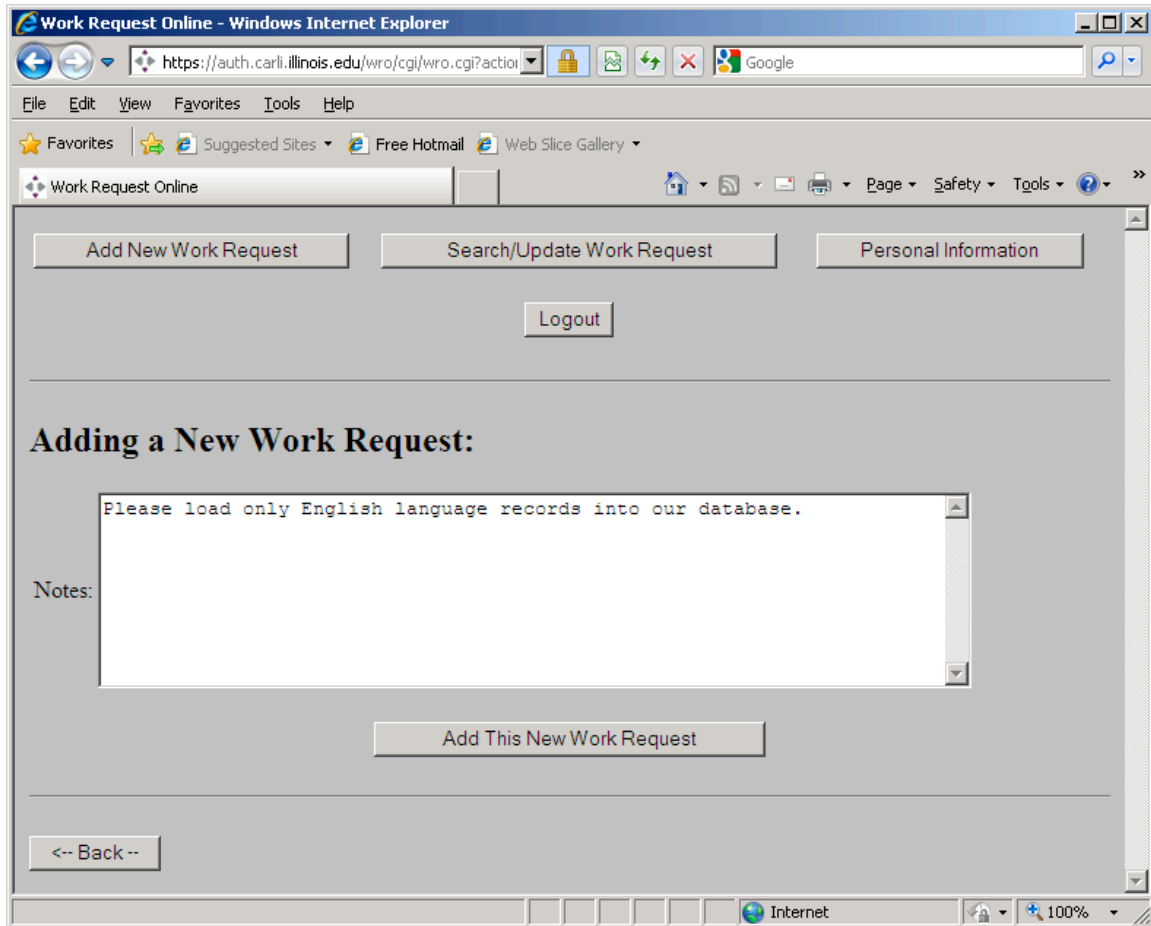
Getting Help

As seen from the above descriptions, there are several customization options available to each library. The library's needs and workflow considerations should be the factors that determine which option is used.

For questions about anything in this document, or the Springer Medicine eBook Collection record loading in general, contact the CARLI Office at support@carli.illinois.edu.