Loading Bibliographic Records for the Alexander Street Press
Collections into I-Share Voyager Databases

Overview

CARLI made consortial purchases of Alexander Street Press (ASP) streaming videos in Spring 2013 and 2014. Each CARLI library was able to select up to six collections in 2013 and three additional collections from those listed below in 2014. Libraries will have access to those collections for ten years. If you do not know which collections your library selected, please contact CARLI at support@carli.illinois.edu. Your library may also have additional ASP video collections that you have purchased on your own.

Also, CARLI made a consortial purchase of two ASP ebook collections, Black Thought and Culture, and Women and Social Movements, Scholar's Edition, through mid-2018.

CARLI-enhanced MARC records are now available for most of the ASP collections, which can be loaded into your Voyager database to enhance your library users' ability to discover and use these materials.

This document details for I-Share libraries the steps and Voyager load options for the ASP records. CARLI libraries that are NOT I-Share libraries should consult http://marc.alexanderstreet.com for information about loading these data into other systems.

ASP Collections

CARLI will provide sets of bibliographic records for the following ASP collections:

Collection Name	Collection Abbreviation
American History In Video	AHIV
Art and Architecture in Video	ARTV
Asian Film Online, Volume I	ASIV
Asian Film Online, Volume II	ASV2
Black Studies in Video	BLSV
Black Thought and Culture	BLTC (ebook)
Classical Music in Video	CLMV
Counseling and Therapy in Video, Volume I	CTIV
Counseling and Therapy in Video, Volume II	CTV2
Counseling and Therapy in Video, Volume III	CTV3
Criminal Justice and Public Safety in Video	LAWV
Current Affairs in Video	CURV
Dance in Video	DAIV
Dance in Video, Volume II	DAV2
Dental Education in Video	DNTL
Education in Video, Volume I	EDIV
Education in Video, Volume II	EDV2
Engineering Case Studies Online	ENGV (ebook and evideo)
Environmental Studies in Video	ENVV
Ethnographic Video Online, Volume I	ANT1
Ethnographic Video Online, Volume II	ANT2
Ethnographic Video Online, Volume III	ANT3

Fashion Studies Online: The Videofashion Library	FASH
Filmakers Library Online, Volume I	FLON
Filmakers Library Online, Volume II	FLN2
Filmakers Library Online, Volume III	FLN3
(Global Business and Economics in Video) - name change to Business Education and Video	BUSV
Health and Society in Video	HLTH
Human Resource Management Online	HRMO (ebook and evideo)
(Human Rights Case Studies) - name change to Human Rights Cases Online	HURI (ebook and evideo)
International Business Management Online name change to International Business Online	IBUS (ebook and evideo)
LGBT Studies in Video	GLTV
The March of Time	MOTO
Meet the Press	MEET
New World Cinema: Independent Features & Shorts, 1990-present	FEAT
Nursing Assessment in Video	NASS
Nursing Assistant Education in Video	NAEV
Nursing Education in Video	MCOM
Nursing Education in Video 2014 update	(not yet available from ASP)
Opera in Video	OPIV
Psychological Experiments Online	PEXP
Rehabilitation Therapy in Video	RTIV
Silent Film Online	SILF
Sports Medicine and Exercise Science in Video	SPEX
Theatre in Video, Volume I	ATIV
Theatre in Video, Volume II	(not yet available from ASP)
The Video Journal of Counseling and Therapy	CJIV
Women and Social Movements	WASS (ebook)
World History in Video	WHIV
World Newsreels Online	(not yet available from ASP)

CARLI's Enhancement of the ASP MARC Records

CARLI staff have pre-processed the bibliographic records for the ASP collections to:
- Add hybrid RDA elements
- Include both the ASP vendor control number and most OCLC control numbers in bib records to help reduce duplicate records in the I-Share union catalog
- Improve data quality and consistency

Sample ASP MARC Records

You may view sample MARC records (as modified by CARLI) from each ASP collection, as well as information such as record count per collection, in the Supplement to this document: Collection Summaries and Example Bibliographic Records for the Alexander Street Press

Collections, which is on the CARLI website at:
http://www.carli.illinois.edu/sites/files/ishare/documentation/secure/ASPVASTExamples.pdf.

ASP Collection Record Load Process (Summary)

This is an overview of the process, full details follow.

1. **Identify the ASP collections your library selected.**
2. **Learn about your data options.**
   Review this document. To see examples of ASP MARC records, also review its supplement document, "Collection Summaries and Example Bibliographic Records for the Alexander Street Press Collections": http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/ASPVASTExamples.pdf
3. **Make your data decisions.**
   By default, all ASP loads will add a bib record and MFHD for each title in the collection. No item records will be created. Also by default, all 856 fields from the bib are copied to the MFHD.
   You will need to be prepared to specify the following options:
   - If you use a proxy server to support off-campus access: Your library proxy string for 856 subfield u and t,
   - Whether you want to delete 856 fields other than the link to the content;
   - Whether you want to create a MFHD call number (e.g., ONLINE);
   - Whether you want to add/delete 856 subfields 3, t, y, and/or z; 655 genre headings, or other bib record fields.
4. **Edit Voyager SysAdmin in preparation for the load.**
   If you have not already done so, create either a specific e-resources location in Voyager SysAdmin, or request a distinctive operator ID. These steps will help you to collectively identify these records (for future modification, deletes, etc.)
5. **File a Work Request Online (WRO)**
   The library's I-Share Liaison or designate must file an online work request (WRO) at http://wro.carli.illinois.edu/ to request that the ASP records be loaded into the local database. Select work request type "Voyager Bulk Import for Electronic Resources ONLY"
   *Note, if you are requesting record loads for both video and ebook collections, and your library assigns a different Voyager location for electronic videos than for ebooks, then create a separate bulk import rule and file a separate WRO for each format.
6. **Review a 10 record test load.**
   CARLI will load the first ten records of one of your collections and place them in your CARLI xxxftp directory for you to review. If you wish to have a 10 record test of each collection, please indicate this in the Notes field in WRO.
7. **Notify CARLI that you approve the test load**
   Your response is the cue for CARLI to load the full data set. Once the library approves the test load, CARLI staff will load the remaining applicable ASP records into the local database.

ASP Video Collection Record Load Process (Details)

1. Identify the ASP collections your library selected.

If you have any questions about which collections your library has access to, please contact the CARLI Office at support@carli.illinois.edu

2. Learn about your data options.

For details about the specific number and content of the ASP bib records, review the supplement to this document "Collection Summaries and Example Bibliographic Records for the Alexander Street Press Collection" at <http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/ASPVASTExamples.pdf>. Optionally, if you would like to view the full file of bibs from any individual collection prior to requesting they be loaded into your Voyager database, send an email to support@carli.illinois.edu.

3. Make your data decisions.

The customization options below are described in the same order as they appear on the WRO form called "Voyager Bulk Import for Electronic Resources ONLY."

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.

An example WRO for an ASP collection bib load can be found starting on page 9 of this document.

4. Edit Voyager SysAdmin

Depending on what you have done previously with bulk loads of records for electronic materials, you may need to set up a Voyager location, and/or bulk import rule for these data.

Adding a location.
If you need to add a new location to Voyager for the ASP records, you must do that before you can create your bulk import rule. See the *Voyager 7.2 System Administration User's Guide,* section entitled "Enabling the Use of a New Location" pages 10-59 through 10-61: http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_SystemAdmin_7_2_3_20101001.pdf .

Creating a bulk import rule.
Your Voyager database needs a Bulk Import Rule for the ASP records. If your library previously loaded other bib records from Alexander Street Press, and if you wish to use that rule, you may be select it, or create a new one as described here.

Cataloging client→ Bulk Import rules→Rule Name tab:

Rule Code: ASPVAST (case-sensitive)
Rule Name: ASP Academic Video Online (case-sensitive)
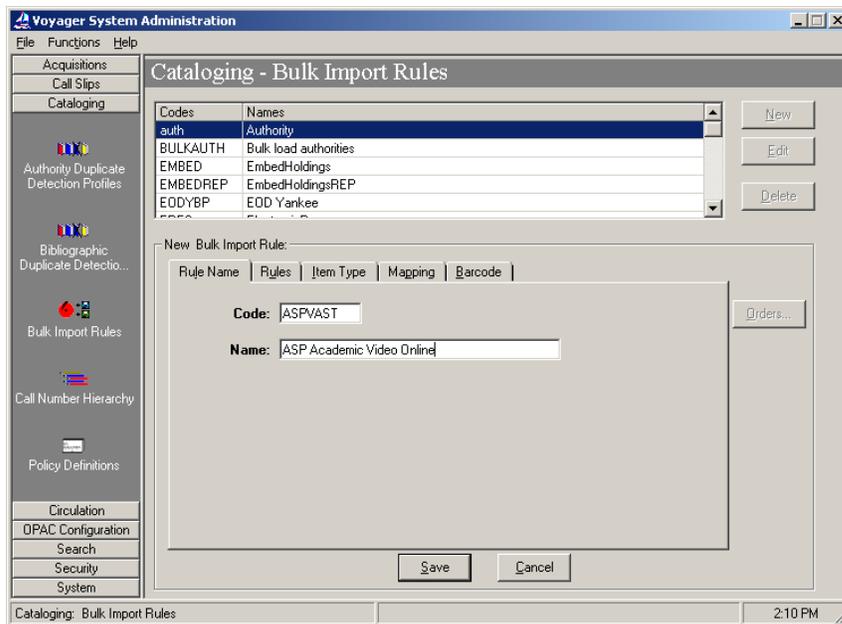
Cataloging client → *Bulk Import rules* →*Rules tab:*

Bib dup profile: select OCLCReplace[1]
Auth dup profile: select AuthReplace
Owning Library: <select your library's owning library code>
MARC Character set mapping: select MARC21 UTF-8

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

Click the "Bibs, MFHDs" radio button.

Avoid checking 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.[2]

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[1] The bibliographic duplicate detection profile of OCLCReplace is recommended. Occasionally, ASP will supply replacement copies of bib records. OCLCReplace will add a new record for any incoming records that <u>do not</u> match an existing record based on control numbers. Incoming bib records that <u>do</u> match an existing record will replace the content of the existing bib and add a new MFHD. In Voyager 7.2.5's bulk import functionality it is not possible to replace the content of an existing MFHD.

[2] Checking the "Copy 856 Field…" box will copy all URL(s) from the bib into the MFHD. If you need the URL modified (e.g., to add a proxy string), you will specify that in the Work Request (WRO) and CARLI staff will do this as part of the pre-processing of your ASP bib records.

Rules tab data entry:
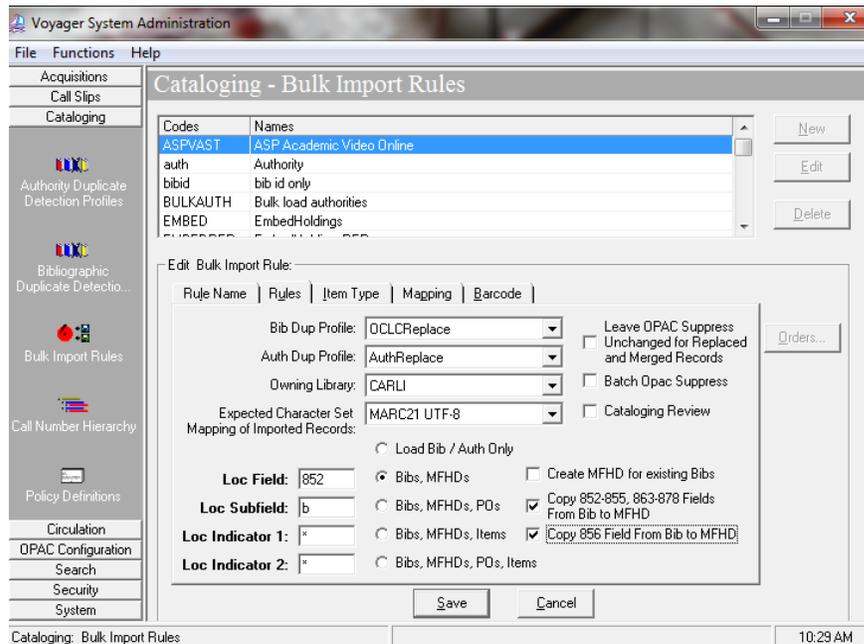
Item type tab: leave blank.

Barcode tab: leave blank.

Mapping tab:

Click Add.

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

MARC Location Code: <enter the Voyager location <u>code</u> (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.

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. Some (but not all) ASPbib 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, a few (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, if the library has selected this load option.

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 for a library that uses a single location for all electronic resources:

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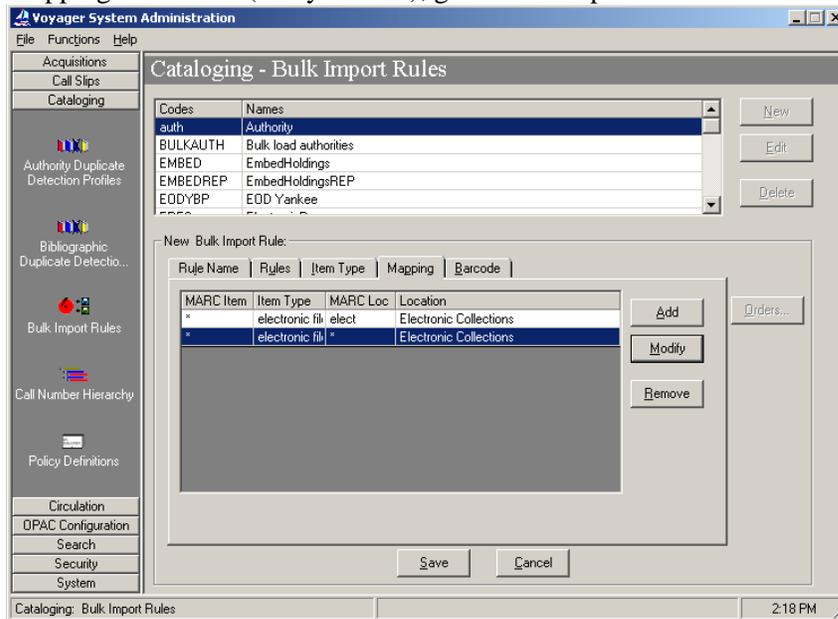
If the Save button is grayed out, this usually means that the Mapping tab doesn't have a final entry with asterisks in both the MARC Item and MARC Loc fields. Go back to the Mapping tab and add this required field, and try to save the bulk import rule again.

5. File a Work Request Online (WRO) for your ASP Load

Complete WRO Items 1-5 as shown here:

1. **Name of the bulk import data file:** ASP VAST

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

3. **Is this a one-time or a recurring load?**
   - ○ One-time load
   - ⊙ Recurring load

   If this is a recurring load, the first load will take longer, as CARLI will need to work with your institution and your supplier on the details.

4. **Should bibliographic records be marked "ok to export"?**
   - ⊙ Yes, mark records "OK to export."
   - ○ No, do not mark records "OK to export."

   Verify this option with your vendor, as some contracts prohibit bib records from being submitted to OCLC.

5. **Will records in the input file update existing records or go in as new?**
   - ⊙ most/all records will be added as new
   - ○ most/all records will replace existing records

WRO Section 6: Bibliographic record details

As a reminder, all of the 856 field(s) are copied from the bib record to the MFHD, so all options described below apply to both the bib and MFHD.

6a. 856 field options:

The WRO form offers these choices:
- retain all existing 856 fields (the default),
- retain only 856 fields that have a specific combination(s) of first and second indicators,
- retain only 856 fields that begin with specific text (e.g., the vendor's standard core part of the URL, such as http://www.aspresolver.com and/or http://ctiv.alexanderstreet.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 ASP collections, 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.

None of the bibs in the initial file(s) obtained for the ASP collections have 856 fields with indicators other than 40. For example, there are no 856 fields with indicators "41" that points to a table of contents link provided by the Library of Congress, as are found in some ebook collection bib records.

For the ASP collections, if a library wishes to retain all full-text URLs but eliminate any possible links to other online resources that may appear in future files of ASP bib records, 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 future 856 fields with indicator values of 41 and 42 being excluded from the bib and MFHD.

Example WRO section 6a:

This library wants the bib and MFHD to contain only the 856 field links to the full-text resource, and is using the indicator values of 40 to represent these desired 856 fields.

6. **Details for 856 field(s) in bibs and MFHDs:**

   a. **856 field options:**

      ☐ Retain all existing 856 fields

      ☑ Retain ONLY the existing 856 fields that contain these first and second indicator values (enter as many indicator combinations as appropriate): 40

      ☐ Retain ONLY the existing 856 fields that begin with the following text (enter here, punctuation- and case-sensitive):

      ☐ Delete any existing 856 fields that contain the following text in 856 subfield 3:

      ☐ Delete any existing 856 fields that contain the following text in 856 subfield y:

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

If your library has a proxy service that supports off-campus access to licensed online resources it is highly recommended that your proxy string be pre-pended to the 856 subfield u when CARLI loads the bib records.
Be sure to enter the proxy string exactly, including punctuation and case-sensitivity and be sure to test your proxy access when reviewing your test loads.

Example WRO section 6b:

This library requested that their proxy string be pre-pended to 856 $u

   b. **Should your institution's proxy string be added to the beginning of 856 subfield u, to support authentication for off-campus access?**

      ○ Yes, add this proxy prefix (punctuation- and case-sensitive): http://library.carli.edu:2048/login?url=

      ○ No, do not add a proxy prefix

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 ASP collections, all bibs contain an 856 field for the resource with $z containing the default text: Access restricted to subscribers.

It is recommended that libraries follow whatever decisions they have made for other e-resources represented in the local database with regard to the 856 $z. Please keep in mind that the CatER2009 Task Force recommended that a statement of restriction be added to a public note field (such as the 856 $z) when access is known to be restricted, which would apply to the ASP collections. If the library wants text other than the default in 856 $z for all records, the option to Change existing 856 $z text should be selected, and the exact text of the customized $z should be entered, including punctuation and case-sensitivity (if applicable).

Example WRO section 6c:

This library requested no special processing to the 856 subfield z data. All default 856 $z data will be retained in this library's bib and MFHD 856 fields.

c. **856 subfield z (public note) options:**

◉ Retain all existing 856 subfield z text as is

◯ Delete any existing 856 subfield z text

◯ Add a new 856 subfield z with the following note text to all records (punctuation- and case-sensitive): [   ]

◯ Change any existing 856 subfield z text in all records to this new text (punctuation- and case-sensitive): [   ]

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),
- delete any existing 856 subfield 3 text,

- add a new 856 subfield 3 with library-specific text,
- change any existing 856 subfield 3 text to different library-specific text.

For the ASP collections, the majority of bibs contain an 856 for the full-text resource with $3 containing the text "Alexander Street Press, <followed by the name of the individual collection>." For example, most bibs in the AHIV collection will have an 856 $3 containing the following text: Alexander Street Press, American History In Video

The relatively few exceptions to this default are when the bib represents a multi-part work, and the 856 $3 supplied by the vendor contains text identifying the individual part. For example:

856 40 $3 Part I: Psychosocial Aspects $u
http://www.aspresolver.com/aspresolver.asp?CTIV;1462023

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.

Example WRO section 6d:

This library requested no special processing to the 856 subfield 3 data. All default 856 $3 data will be retained in this library's bib and MFHD 856 fields.

d. **856 subfield 3 (materials specified) options:**

- ⦿ Retain all existing 856 subfield 3 text as is

- ○ Delete any existing 856 subfield 3 text

- ○ Add a new 856 subfield 3 with the following "materials specified" description to all records
  (punctuation- and case-sensitive): _____

- ○ Change any existing 856 subfield 3 text in all records to this new "materials specified" description
  (punctuation- and case-sensitive): _____

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) to 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 ASP collections, 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.

Example WRO section 6e:

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

e. **856 subfield y (link text) options:**

  ⦿ Retain all existing 856 subfield y text as is

  ◯ Delete any existing 856 subfield y text

  ◯ Add a new 856 subfield y with the following linking text to all records (punctuation- and case-sensitive): _____

  ◯ Change any existing 856 subfield y text in all records to this new linking text (punctuation- and case-sensitive): _____

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

Many vendors include a 655 field in e-resource bib records, to add an access point to the records representing what the form of the work is, rather than what the work is about.

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 ASP video collections, all of the bibs contain at least the two 655 fields below:

655 with Indicator1 = blank, Indicator2 = 7 and $a Internet videos. $2 lcgft
655 with Indicator1 = blank, Indicator2 = 4 and $a Streaming videos.

The majority of the ASP bibs also contain additional 655 fields with other $a content, including many valid Library of Congress Genre/Form headings (i.e., $2 lcgft).

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

Example WRO section 7:

This library requested no special processing to the 655 field data.

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

     ⊙ Retain all existing 655 field(s) as is

     ○ Delete any existing 655 field(s)

     ○ Add a new 655 with the following subfield(s) and subfield text to all records (punctuation- and case-sensitive):

     ○ Change any existing 655 field(s) in all records to this new genre heading (punctuation- and case-sensitive):

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 ASP collections. Libraries should consider consistency with other records for electronic resources in the local database if this option is selected.

Example WRO section 8:

This library requested no special bib record field additions.

8. **Add a bib field(s) option:**

If a new bib record field(s) should be added to all records, specify the field tag, indicator 1, indicator 2, and subfield code(s) and subfield text (punctuation- and case-sensitive):

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 ASP collections. Libraries should consider consistency with other records for electronic resources in the local database if this option is enabled.

Example WRO section 9:

This library requested no special bib record field deletions.

9. **Delete a bib field(s) option:**

> If a bib record field(s) should be deleted from all records, specify the field tag, indicator 1 and indicator 2 (if applicable), and subfield text (if applicable) to be removed (punctuation- and case-sensitive):

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 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. The CatER2009 Task Force report includes recommendation R17 that encourages libraries to assign a topical call number or class number to each electronic resource using an appropriate classification scheme. 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 Name from Voyager's System Administration/Cataloging be identified.

NOTE: Some (but not all) of the ASP collection 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, a very few of the bib records contain a National Library of Medicine call number in the 060 field (subfields a and b). Staff considering this option for the ASP collections should consult the document entitled "Collection Summaries and Example Bibliographic Records for the Alexander Street Press Collection" for details on the number of bibs per collection that contain the various call number fields. The Collection Summary document is available from the URL below:

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/ASPVASTExamples.pdf

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/sites/files/i-share/documentation/secure/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 CatER2009 Task Force recommendations, the load is not designed to create item records, but the MFHD standard indicates the copy number is to be 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 and report when the $t is missing, so including a copy number for the ASP collections may reduce the number of records retrieved by those queries.

Example WRO Section 10

This library requested that the call number of "ONLINE" be added to all MFHDs created during the load, with no call number prefix (10a).

This library requested that an 852 $t with value 1 be added to all MFHDs created during the load. (10b)

10. **MFHD details:**

    a.   i.   **Call number options:**

        ○ Do not add any call number to any MFHDs

        ○ Copy the call number from the bib to MFHD using the following call number hierarchy from Voyager SysAdmin/Cataloging: [_____]

        ⊙ Add the following same call number text to all MFHDs (punctuation- and case-sensitive, for example: subfield h INTERNET): [$h ONLINE]

    ii.   **If a call number is specified above, should a call number prefix be added to 852 $k?**

        ⊙ No, no call number prefix

        ○ Yes, add the following call number prefix (punctuation- and case-sensitive): [_____]

    b.   **852 $t (copy number) options:**

        ⊙ Add an 852 subfield t with the value 1 to all MFHDs

        ○ Add an 852 subfield t with the following copy number to all MFHDs: [_____]

        ○ Do not add an 852 subfield t to any MFHD

11. Item record copy number option:

The 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 CatER2009 Task Force recommendations and load only bibs and MFHDs for e-resources (and not to create item records at all). In that scenario, this WRO option is moot and can be ignored.

Example WRO Section 11:

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

11. **Copy number on item records (if any created):** [   ]

12. Distinctive Operator ID option:

Libraries have the option to add a distinctive Operator ID to the ASP records to aid in easily identifying these records in the future. Operator IDs should be no more than 10 characters, include no spaces, and may include dashes or underscores.

Example WRO Section 12:
This library decided to request the distinctive operator ID "CARLIASP13" to be added during their record loads.

12. **Operator ID (if a distinctive ID would be helpful):** [CARLIASP13]

A distinctive operator ID can make these records easy to identify in the future (in order, for instance, to delete them in batch). An operator ID specified here does not need to be (and probably should not be) a "real" ID for a library staff member. CARLI's default for bulk loads is to leave the operator ID blank.

13. Data Quality Review
Since CARLI staff have reviewed these files ahead of your load, please select "Yes" for questions in parts a, b, and c.

Notes section: <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 their proxy string to be applied to 856 fields with indicator values of 40, only. CARLI staff can do this as part of their pre-processing of the ASP records, but this special customization MUST be recorded in the Notes field of the WRO in order to be implemented.

In addition, it is the library's responsibility to inform CARLI staff about which of the ASP collections are to loaded into the local database. See the IMPORTANT NOTE in the next section for more details.

WRO Notes Field

This screen is where you can enter additional customizations to the ASP collection bib records that are not covered in WRO sections 1-13 above.

In addition to any customizations that may need to be explained in the Notes field of the WRO, the library MUST include a listing of the specific ASP collections for which a bib load(s) is being requested. The table on pages 1-2 includes all collection bib records available. Use the 4-

character abbreviations in the second column of the table below to identify the specific collection bib records to be loaded based on the WRO.

For example, this library has selected the following ASP video collections: Counseling and Therapy in Video, Volume I; Counseling and Therapy in Video, Volume II; and Nursing Education in Video. They want their proxy string applied only to 856 fields with indicator values of 40. Their WRO Notes section would look like the example in the screen shot below.
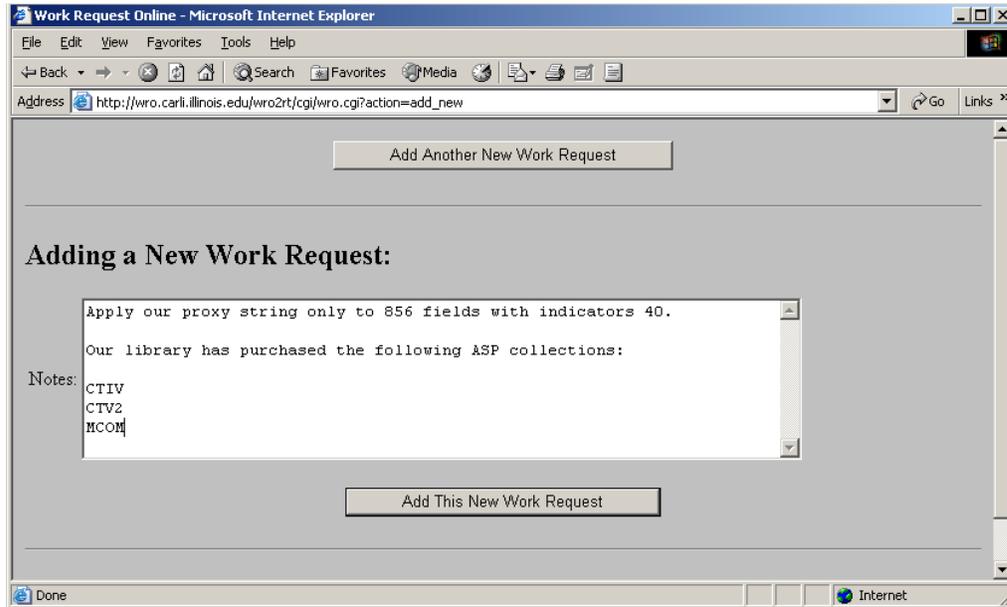
For another example, this library has purchased all of the available video collections. Therefore, their WRO Notes section would look something like the example in the screen shot below:
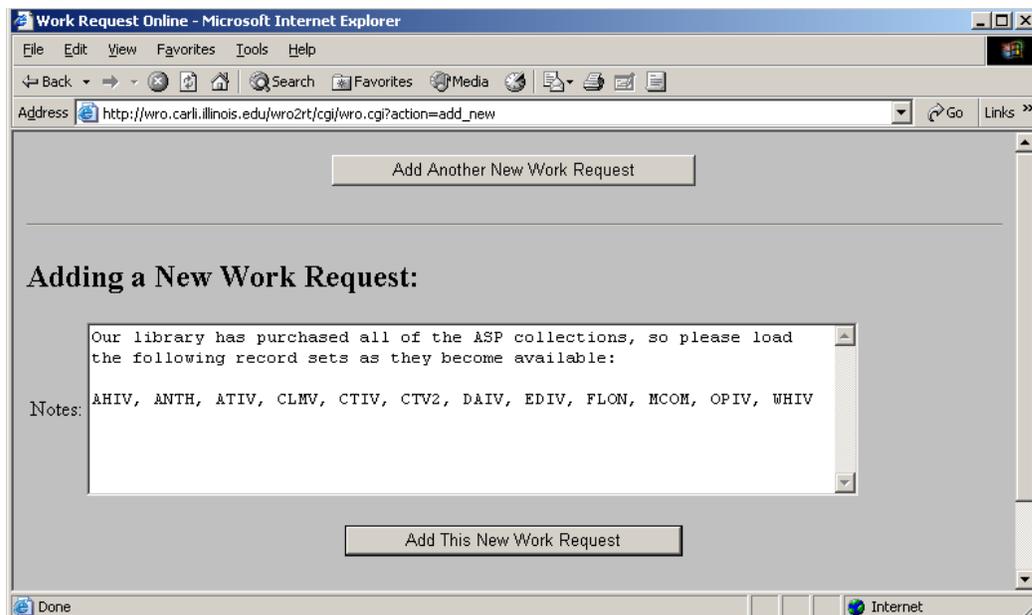
Load Log Files

The bib records for each collection requested in the library's WRO will be loaded separately, rather than combined into one file per library. The log files generated from the full loads will be placed in the library's xxxftp directory on the files server. This applies to the initial loads, as well as for any supplemental loads that may become available for an individual collection.

Each collection's load will generate at a minimum one log file, using the naming convention below:

ASP_XXXX_log.txt
(where XXXX represents the collection abbreviation(s) described in the chart on page 25)

Depending on the content of a library's Voyager database, the load(s) can generate additional log files, for example if any records are discarded from the load because they match more than one existing record in the local database.

The ASP loads will be performed using standard Voyager bulk import functionality. The description of all of the potential types of logs/error messages from bulk import jobs are found in Section XII of the "Using OCLC for Batch Loading Records into I-Share Databases" document, available at:
http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/using_OCLC.pdf

The log file naming convention described in the "Using OCLC" document will vary from the naming convention to be used for the ASP loads, but the general content of the various types of bulk import log files are conceptually the same, no matter what the source is of the bib records being processed.

Getting Help

For questions about anything in this document, or the Alexander Street Press collection bib record loads in general, contact the CARLI Office at support@carli.illinois.edu.

Appendix I: CARLI Best Practices for Bibliographic Records for E-Resources

CARLI's Best Practices for E-Resource records are covered in the document "Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009) Final Report" (CatER2009 Task Force)
http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cater2009_finalreport.pdf
The recommendations in this document follow the CatER 2009 recommendations.

Specifically:
- A Voyager bib and MFHD record, but no item record, will be added to the local database.
- The URL(s) will be copied from the bib into the MFHD

There are multiple other customizations available to I-Share libraries for these e-resource bibs, as detailed below.

The CatER2009 Task Force final report also recommends that the library assign a location code to the MFHD that represents an electronic resource "location." It is the local library's decision whether to create a new location specific to this set of bib records, or to use a generic electronic resource location covering multiple vendors/packages. This document assumes the library has already created their desired 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 7.2 System Administration User's Guide,* section entitled "Enabling the Use of a New Location" pages 10-59 through 10-61.

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_SystemAdmin_7_2_3_20101001.pdf

Libraries who choose not to create a new location may wish to request a distinctive Operator ID be assigned to these records during the load for later identification and deletion.