

Loading Bibliographic Records for the Sage E-journal 2007 Deep Backfile Collection into I-Share Voyager Databases

Overview

CARLI made a consortial purchase of the Sage E-Journal 2007 Deep Backfile Collection for all CARLI governing members in 2007. The collection was initially made available on a cost-recovery basis and was then opened to all Governing members in 2012. Access for libraries continues in perpetuity. The Deep Backfile Collection includes the content of each journal from issue 1, volume 1, through the last issue of 1998. There are currently 299 available titles in this collection.

In a joint project between Greenville College and CARLI, a set of MARC records for the Sage 2007 Deep Backfile Collection was obtained from OCLC WorldCat and enhanced. This set is now available to load into your Voyager database to improve your library user's ability to discover and use these materials.

This document details for I-Share libraries the steps and options for loading these Sage records.

Record Enhancements

The Sage bibliographic records were pre-processed to:

- Add hybrid RDA elements
- Include the Deep Backfile volume designations for loading into the MFHDs
- Improve data quality and consistency

Please note, if your library purchased a separate subscription for content from January 1999 to the present, CARLI recommends you adjust the 866 volume designations accordingly. The most efficient way to do this would be for you to edit the 866 volume designations prior to the record load. To place a request for the records, please email support@carli.illinois.edu.

Sample MARC Records

Number of bib records: 299

Number of occurrences of call number fields:

050 \$a or \$a and \$b: 302

060 \$a or \$a and \$b: 22

082 \$a: 225

090: 0

092 \$a: 62

096: 0

Example bibs:

(NOTE: The following examples are in MarcEdit view and thus lack additional spacing before and after subfields. Regular spacing will display in Voyager once the records are loaded. Also, the “\”

character in the indicator positions represents a blank space. The actual MARC records do not include a back-slash character in the indicators.)

```
=LDR 02243cas a2200481 a 4500
=001 ocm54431746\
=003 OCoLC
=005 20141216115743.0
=006 m\\o\\d\\
=007 cr\\mnu|
=008 040217c20049999enkqr\\p\\o\\0\\eng\\d
=040 \\$aEUN$cEUN$dOCLCQ$dOCLC$dMUQ$dOCLCS$dOCLC$dDLC$dOCLCQ$dWAU$dOCLCO$dOCLCF
=022 \\$y1741-1432
=043 \\$ae-uk---
=050 \\$aLB2901
=092 \\$a371.200941
=049 \\$aILLA
=130 0\\$aEducational management, administration & leadership (Online)
=245 10\\$aEducational management, administration and leadership$h[electronic resource].
=246 13\\$aEducational management, administration & leadership
=260 \\$aLondon :$bSage,$c2004-
=300 \\$a1 online resource
=310 \\$aFour no. a year
=336 \\$atext$btxt$2rdacontent
=337 \\$acomputer$bc$2rdamedia
=338 \\$aonline resource$bcr$2rdacarrier
=362 0\\$aVol. 32, no. 1 (Jan. 2004)-
=530 \\$aAlso issued in print.
=588 \\$aTitle from journal info. screen (viewed 16 Feb. 2004).
=650 \\$aSchool management and organization$zGreat Britain$vPeriodicals.
=650 \\$aAdministration scolaire$zGrande-Bretagne$vPériodiques.
=650 \\$aSchool management and organization.$2fast$0(OCoLC)fst01107575
=651 \\$aGreat Britain.$2fast$0(OCoLC)fst01204623
=655 \\$aPeriodicals.$2fast$0(OCoLC)fst01411641
=655 \\$aElectronic journals.
=710 2\\$aBritish Educational Leadership and Management Association.
=776 1\\$tEducational management, administration & leadership$x1741-1432$w(DLC)
2004249030$w(OCoLC)54350911
=780 00\\$tEducational management & administration (Online)$w(OCoLC)41551161
=856 40\\$3Sage 2007 Deep Backfile$uhttp://EMA.sagepub.com/$zAvailable to people from CARLI
member institutions.
=856 4\\$uhttp://firstsearch.oclc.org$zAddress for accessing the journal using authorization number and
password through OCLC FirstSearch Electronic Collections Online
=856 4\\$uhttp://firstsearch.oclc.org/journal=1741-1432;screen=info;ECOIP$zAddress for accessing the
journal from an authorized IP address through OCLC FirstSearch Electronic Collections Online
=866 31\\$80$av. 1-26 (1972-1998)
=994 \\$aC0$bILL

=LDR 01706cas a2200433 a 4500
=001 ocm61314072\
=003 OCoLC
=005 20141216115743.0
```

=006 m\\o\\d\\
 =007 cr\\un|
 =008 050822c19949999ii\\fr\\pso\\0\\eng\\d
 =040 \\\$aOCLCS\$beng\$cOCLCS\$dOCLCSQ\$dVRC\$dOCLCQ\$dOCLCF
 =022 \\\$y0971-5231
 =043 \\\$aaz-----
 =050 \\\$aDS331\$b.S665
 =082 04\$a954.005
 =049 \\\$aILLA
 =130 0\\\$aSouth Asian survey (New Delhi, India : 1994 : Online)
 =245 10\\\$aSouth Asian survey\$h[electronic resource] :\$ba journal of the Indian Council for South Asian Cooperation.
 =246 30\\\$aJournal of the Indian Council for South Asian Cooperation
 =260 \\\$aNew Delhi ;\$aThousand Oaks, Calif. :\$bSage Publications
 =300 \\\$a1 online resource
 =310 \\\$aSemiannual
 =336 \\\$atext\$btxt\$2rdacontent
 =337 \\\$acomputer\$bc\$2rdamedia
 =338 \\\$aonline resource\$bcr\$2rdacarrier
 =362 1\\\$aPrint began with v. 1, no. 1 (Jan.-June 1994).
 =515 \\\$aVol. 1, no. 1 (Jan.-June 1994) also called v. 1, no. 1 (Mar.-Aug. 1994).
 =530 \\\$aAlso issued in print.
 =588 \\\$aDescription based on print version record.
 =651 \\\$aSouth Asia\$vPeriodicals.
 =651 \\\$aSouth Asia.\$2fast\$(OCoLC)fst01244520
 =655 \\\$aPeriodicals.\$2fast\$(OCoLC)fst01411641
 =655 \\\$aElectronic journals.
 =710 2\\\$aIndian Council for South Asian Cooperation.
 =776 1\\\$tSouth Asian survey (New Delhi, India : 1994)\$x0971-5231\$w(DLC) 94905680\$w(OCoLC)32869239
 =856 40\$3Sage 2007 Deep Backfile\$uhttp://sas.sagepub.com/\$zAvailable to people from CARLI member institutions.
 =866 31\$80\$av. 1-5 (1994-1998)
 =994 \\\$aC0\$bILL

Record Load Process (Summary)

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

1. Identify your library's access.

2. Learn about your data options.

Review this document for loading options as well as content about the Sage 2007 Deep Backfile MARC records.

3. Make your data decisions.

Record loads for this collection will add a bib record and MFHDs from an interleaved file. No item records will be created.

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,
 - What location code will be inserted in the MFHD 852 \$b.
4. **Edit Voyager SysAdmin in preparation for the load.**
 - a. 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.).
 - b. Create or use either the standard bulk import rule Unicode No Holdings Replace (UNOHLDRP) or create the collection specific bulk import rule Sage 2007 Deep Backfile (SAGEDEEP). As described below, a no holdings mode will be necessary due to the way MFHDs will need to be created for these files.
 5. **File a Work Request Online (WRO)**
Your library's I-Share Liaison or designate must file an online work request (WRO) at <http://wro.carli.illinois.edu/> to request that the Sage records be loaded into your local database. Select work request type "Voyager Bulk Import for Electronic Resources ONLY"
 6. **Review a 10 record test load.**
CARLI will load the first ten records of one of the collection and place them in your CARLI xxxftp directory for you to review.
 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 Sage records into the local database.

Record Load Process (Details)

1. Identify your library's access.

All CARLI governing members have access to the Sage E-journal 2007 Deep Backfile Collection. If you have any questions about whether or not your library purchased an additional subscription for the Sage content from January 1999 to the present, please contact the CARLI Office at support@carli.illinois.edu.

2. Learn about your data options.

Details about the specific number and content of the Sage bib records are provided under the heading *Sample MARC Records* above. Optionally, if you wish to view the full file of bibs prior to requesting they be loaded into your Voyager database, please 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."

An example WRO for a Sage 2007 Deep Backfile bib load is provided below.

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.

a. Adding a location.

If you need to add a new location to Voyager for the Sage 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 .

b. Creating a bulk import rule.

Your Voyager database needs a Bulk Import Rule for the Sage records, like the standard Unicode No Holdings Replace Mode (UNOHLDRP). This type of mode is necessary due to the way the holdings will need to be created when the records are loaded. Because the bibliographic records are provider neutral, and thus contain numerous vendor 856 fields, the MFHDs will need to be loaded using an interleaved file to ensure only the [sagepub.com](http://www.sagepub.com) URLs will be added to the MFHDs. (Note, additional MFHD information for the Voyager location code must be provided in the WRO's final Notes area, as described below. Call number information can be provided in WRO question 10.)

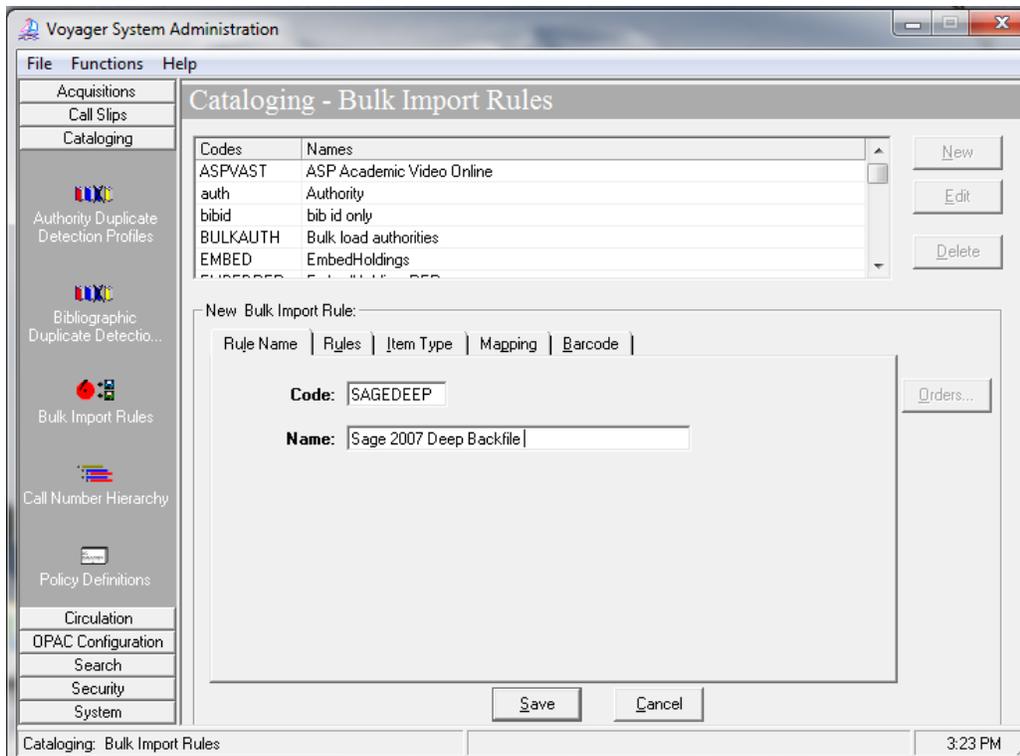
You can use the standard UNOHLDRP bulk import rule as described on p. 29 of the [Voyager System Administration in I-Share Librarians, Part 6: Cataloging](#), or create a new one specifically for the Sage 2007 Deep Backfile Collection as described here.

SysAdmin client → *Cataloging* → *New* → *Bulk Import rules* → **Rule Name tab:**

Rule Code: SAGEDEEP (case-sensitive)

Rule Name: Sage 2007 Deep Backfile (case-sensitive)

Rule Name tab example:

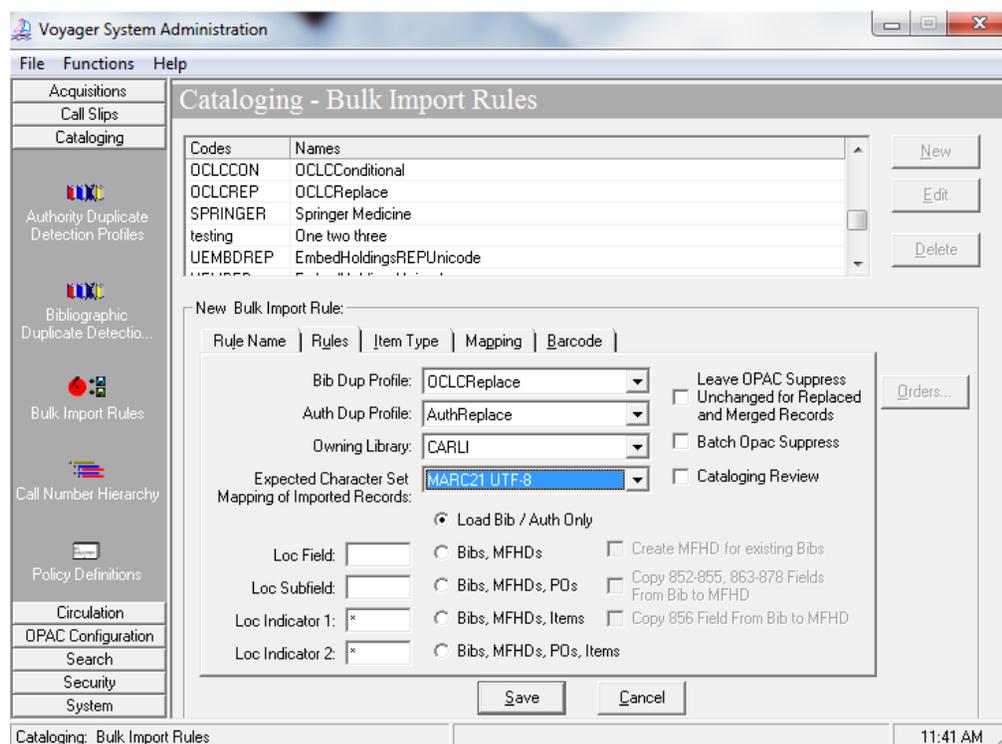


Rules tab:

- Bib dup profile: select OCLCReplace¹
- Auth dup profile: select AuthReplace
- Owning Library: <select your library’s owning library code>
- MARC Character set mapping: select MARC21 UTF-8
- Loc field: *blank*
- Loc subfield: *blank*
- Loc indicator 1: *
- Loc indicator 2: *

¹ The bibliographic duplicate detection profile of OCLCReplace is recommended. OCLCReplace will add a new record for any incoming records that do not match an existing record based on control numbers. Incoming bib records that do match an existing record will replace the content of the existing bib. For this set of records, bulk import will not be creating MFHDs for these files. Instead, MFHDs will be loaded from an interleaved file. In this scenario, if the location of an existing MFHD and the MFHD in the interleaved file match, the existing MFHD will be deleted and the new MFHD will be added to your database.

Rules tab example:



Item type tab: leave blank.

Mapping tab: leave blank since MFHDs will need to be loaded using an interleaved file.

(When filing your WRO, you will be able to include the Voyager location and call number hierarchy, if any, that should be added to the MFHD 852 field.)

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

5. File a [Work Request Online \(WRO\)](#) for your Sage Load

WRO Steps:

Work Request Type: Bulk Import for Electronic Resources ONLY

Complete WRO steps 1-4 as shown here:

(Note, if your bulk import rule code is something other than SAGEDEEP, adjust question 2 accordingly.)

1. **Name of the bulk import data file:**
2. **Bulk import rule code (case sensitive):**

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.

WRO step 5. Will records in the input file update existing records or go in as new?

Unless your library has already imported records from the Sage 2007 Deep Backfile Collection, select most/all records will be added as new.

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 step 6. Details for 856 fields in bibs and MFHDs.

As a reminder, when this set of records is loaded, only the sagepub.com URLs will be added to MFHDs.

6a. 856 field options

The WRO form offers these choices:

- retain all existing 856 fields,
- 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 sagepub.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 Sage collection, all bibs have at least one 856 field with indicators "40" that link to the full-text resource and \$3 Sage 2007 Deep Backfile.

Most bibs also include multiple 856s, as is common in provider-neutral records. These records have 856 fields with indicators of 40 and 4\ . Most records containing 4\ contain URLs for access through OCLC FirstSearch Electronic Collections Online or UMI ProQuest Direct.

There are no 856 fields with indicators 41 that point to a table of contents link provided by the Library of Congress. However, eight bibs have indicators of 42 representing the related resource <http://www.metapress.com>.

Recommendation R11 of the [CatER 2009 Task Force's Final Report](#) indicates that each library can make its own decision whether to keep, remove, display and/or hide the 856 field(s) in its bibliographic records. Any URLs in the 856 field(s), subfield u of the bibliographic record should be appropriate to the library's end-users.

You can request these Sage records to review ahead of time in order to identify the vendor URLs in which your library does or does not have access by emailing support@carli.illinois.edu.

To specify that only certain vendor URLs should be kept in the records for your library's load, select "retain only 856 fields that begin with specific text" in WRO option 6a and include the vendor's standard core part of the URL, such as sagepub.com.

If your library wishes to retain all present 856 links, then enter nothing in the blanks for WRO option 6a.

If your library wishes to retain all links but those for related resources and those in which no relationship information was provided, then select the option to retain 856 fields based on indicator values, and enter only "40" in the input box. This will result in any records with 856 fields containing indicator values of 42 or 4\ being excluded from the bib records.

Or, if your library wishes to only exclude related resources, then select the option to retain 856 fields based on indicator values and enter "40, 4\" in the input box. This will result in only records with 856 fields containing indicator values of 42 being excluded.

Also, if your library wishes to exclude specific URLs, then select the option to delete any existing 856 fields that contain the following text in 856 subfield 3 and enter the standard text in the URLs that can be used to identify them. For example, since some Google links do not provide full or partial-text access in the records, you could request all Google links be removed by adding "Google" in the input box.

Example WRO section 6a

Following the CatER Task Force's recommendation, this library wishes to remove all 856 fields to which their patrons will not have access as well as remove any Google Books links. They have selected "retain only 856 fields that begin with specific text" in WRO option 6a and included the Sage standard core part of the URL, sagepub.com.

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

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 6a

This library requests that their proxy string be pre-pended to an 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):
- 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 access information about the resource with patrons.

The WRO form offers these choices:

- retain all existing 856 subfield z text as is,
- delete any existing 856 subfield z text,
- add a new 856 subfield z with library-specific text,
- change any existing 856 subfield z text to different library-specific text.

For the Sage 2007 Deep Backfile collection, all sagepub.com 856s contain the default text: Available to people from CARLI member institutions.

Your library can follow whatever decisions have been made in the past for other e-resources represented in your local database with regard to the 856 \$z. Please keep in mind that the CatER2009 Task Force recommends 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 Sage 2007 Deep Backfile collection. 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 offers these choices:

- retain all existing 856 subfield 3 text as is,
- 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.

All Sage 2007 Deep Backfile 856 fields contain an 856 \$3 with the text "Sage 2007 Deep Backfile".

CARLI recommends all existing 856 \$3 in these records be retained. Of course, if your 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 offers these choices:

- retain all existing 856 subfield y text as is,
- delete any existing 856 subfield y text,
- add a new 856 subfield y with library-specific text,
- change any existing 856 subfield y text to different library-specific text.

For the Sage 2007 Deep Backfile collection, only two records have 856 fields containing \$y.

Your library can follow whatever decisions have made for other e-resources represented in your local database with regard to 856 \$y.

Example WRO section 6e:

This library requested no special processing for the 856 subfield y text. All default 856 subfield y text will be retained in this library's bibs and MFHDs.

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 offers these choices:

- retain all existing 655 fields as is,
- delete any existing 655 fields,
- add a new 655 field with library-specific text,
- change any existing 655 fields to different library-specific text.

All Sage 2007 Deep Backfile collection records contain at least one 655:

655 \0\$aElectronic journals.

To enhance access for library users, we recommend retaining all existing 655 fields in the 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 your library to specify a new bib record field(s) that should be added to all records during the load. You 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 Sage 2007 Deep Backfile collection. Your library should consider consistency with other records for electronic resources in your 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 your library to specify a bib record field(s) that should be deleted from all records prior to the load. You 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 Sage 2007 Deep Backfile collection. Your library should consider consistency with other records for electronic resources in your 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):

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 your library's local practice. 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 your library to specify that

- (A) no call number is to added to MFHDs during the load,
- 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 your library needs a call number prefix (852 \$k) added, you can specify that in 10a, part ii.

(A) If no call number is to be added to the MFHDs, select Add no call number to any MFHDs.

(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: All Sage 2007 Deep Backfile bib records have a Library of Congress call number in the 050 field (subfield a or subfields a and b). Some, but not all, bib records contain an LC-created Dewey class number in 082 subfield a, with some containing a locally-assigned 092 subfield a. In addition, some of the bib records contain a National Library of Medicine call number in the 060 field (subfield a or a and b). Details on the number of call number fields and sample records are provided in the *Sample MARC Records* section above.

If your library chooses the option to copy the call number from the bib into the MFHD, be sure your desired call number hierarchy in the System Administration module 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 question 10a, part ii, 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 offers the following options:

- add an 852 subfield t with value 1,
- add an 852 subfield t with a library-specified value,

- not add any 852 \$t at all.

Your library can follow whatever decisions have been made for other e-resources represented in your 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 Sage collection 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):

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 an item record copy number other than 1 applied during the load.

CARLI encourages libraries 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 this scenario, this WRO option is moot and can be ignored.

Example WRO Section 11:

Because this library's Sage load 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:

Your library has the option to add a distinctive Operator ID to the Sage 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 "SAGE07DEEP" to be added during their record loads.

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

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.

WRO Notes Field

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

In addition, your library MUST indicate the location in which the Sage 2007 Deep Backfile Collection should be loaded. Specifically, indicate the Voyager location code which should be added to the 852 subfield b. A list of your library's current locations and their corresponding codes is available in the System Administration module under the System tab → Locations.

The Sage 2007 Deep Backfile bibliographic records are provider neutral, and thus contain numerous vendor 856 fields. To ensure only the sagepub.com URLs will be added to the MFHDs, they will need to be loaded using an interleaved file. Since the location code information will not be pulled from the bulk import rule, it is necessary to indicate the location code information in the WRO Notes field.

Example WRO Notes:

This library requested that CARLI apply the location code "eresource" to their Sage 2007 Deep Backfile records.

Notes:

Please apply location code: eresource to the MFHD 852 \$b's.

<-- Back --

Add This New Work Request

Load Log Files

The log files generated from the full load will be placed in the library's xxxftp directory on the files server.

The load will generate at a minimum one log file, using the naming convention below:

Sage2007Deep_log.txt

Depending on the content of a library's Voyager database, the load 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.

A 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 Sage load, 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 Sage 2007 Deep Backfile Collection bib record loads in general, contact the CARLI Office at support@carli.illinois.edu.