TESTIMONY

USING MARCEDIT AND OCLC CONNEXION TO ENHANCE BIBLIOGRAPHIC RECORDS IN A BATCH

With the tight budgets common to libraries these days, cataloging departments search for ways to add value while streamlining processes. At Buswell Memorial Library (Wheaton College, IL), we've developed a method for enhancing our records with contents notes to make them more searchable for our users, then adapted that method to add Library of Congress Classification (LCC) numbers in preparation for a reclassification project.

Project Background

We began the table of contents project to make our records more discoverable. For several years the cataloging department followed a policy of adding contents notes to records for only materials that correspond with the disciplines in our doctoral programs, namely, Bible, theology, and psychology. We recently eliminated this policy to include all newly added materials with useful tables of contents, since keyword searching should benefit all of our users. In addition, many of our records hadn't been updated since they were originally added to our ILS, so several of them had corresponding OCLC records with contents notes added by others. Rather than duplicate work already done by OCLC subscribers, we created this method to import those enhancements in a batch.

The LCC enhancement project began as a way to save money for a hoped-for reclassification from Dewey Decimal to LCC. If the project proceeds, we will be hiring a vendor that charges per record, and records that lack valid call numbers in the 050 or 090 cost more than records that include them. An older policy required catalogers to delete the 050 from records since they weren't needed at the time, so several of our older records were missing call numbers that existed in their corresponding OCLC records.

Procedure

1. Identify a Record Set to Target

This step varies depending on the ILS. Buswell uses Voyager, so we query a Microsoft Access database to generate reports. For our table of contents project, we focused on our main circulating collection and generated a report of all records in within a specified call number range in that main collection. We found it best to target sections of the collection at a time rather than attempt to complete it all at once. For our reclassification project, we generated a report of all records in the locations that we plan to reclassify. From the report, copy the list of record identifiers (in Voyager it's called the Bib ID), paste it into an empty Notepad file, and save it.

2. Extract Records

Extract the identified record set from the ILS. If you don't have the ability to extract records from your ILS directly, this can be done using MarcEdit's Z39.50/SRU Client feature. With the Batch Search Utility (found by clicking on Batch Mode), link the source file field to the list of Bib IDs previously created, and extract each record in the list. Before you can extract records, your database needs to be added to MarcEdit's Z39.50 client. The University of Illinois at Urbana-Champaign (UIUC) has a tutorial for this process, but it varies across institutions, and not all databases support Z39.50, so check with your systems administrator for help. UIUC also offers a helpful tutorial for querying help.

3. Identify Records Lacking Desired Enhancements

Open MarcEditor and use the Select Records for Edit function under File to identify missing fields by entering the desired field, such as 505, into the Display Field box, import the file, and select "Does Not Match", then export the resulting record set to a new file. UIUC provides a useful tutorial for this step as well.

4. Export OCLC Numbers to Text File

Use MarcEdit's Export Tab Delimited feature to extract the OCLC numbers from the new file into a text file, then perform

a Find/Replace to add the "#" symbol before each number to make the text file readable for OCLC Connexion.

5. Extract Records from OCLC Connexion

Using the edited text file, perform a batch search in OCLC Connexion and then export the search results into a new MARC file.

6. Merge OCLC Records into ILS Records

Using MarcEdit's Merge Records feature, merge the enhanced records with the original ILS records. Since we do not want to completely overlay our Voyager records, we tell the program only to merge specified fields, such as 505 or 050.

7. Load Enhanced Records into the ILS

Finally, load the enhanced records back into the ILS. For us, this involves contacting our consortium with a bulk import request.

8. Final Steps

These vary depending on the project, but for our table of contents and reclassification projects, we want to identify which records still lack a 505 or 050, so we run Step 3 on the merged file from Step 6 to tell us which records to target manually, then export the resulting file to an Excel spreadsheet using the Export Tab Delimited feature. This creates a list of records our staff uses to manually enhance the records. For the table of contents project, our cataloging student assistant pulls the corresponding items from the shelf, manually enhances the records in Connexion, and then copies the changes to our Voyager records. For the reclassification project, our cataloging staff assigns LCC numbers and places them in 090 fields to indicate local use. We do not add these numbers to the OCLC master records.

Conclusion

In the past year, we've added 5500 contents notes with this method, and we estimate that we've saved about $6000 on the reclassification project.

This article provides a broad overview of our batch enhancement method, but the actual procedure includes more detailed steps. If you want comprehensive instructions, please contact me at christa.strickler@wheaton.edu, and I'll be happy to send them to you or answer any questions.

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