



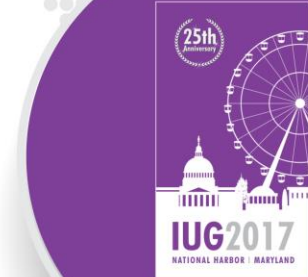
**25TH ANNUAL
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CONFERENCE**

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Simplify Workflows with Edifact and Item Loading

Because Everyone in Technical Services Retired



Presented by

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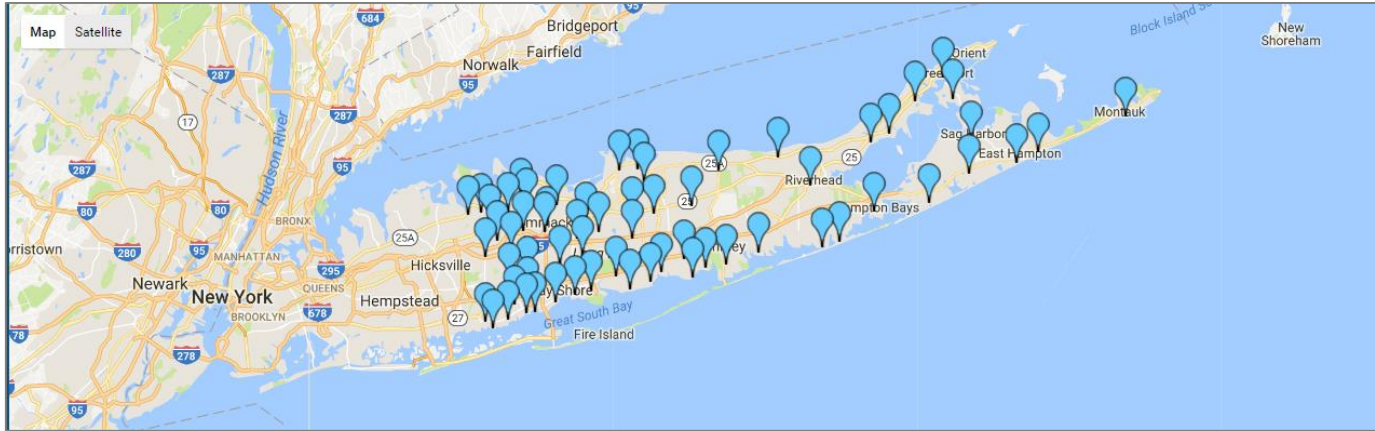
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This is Us



PALS – Partnership of Automated Libraries in Suffolk

- 51 independent member libraries
- 7.5 million items
- 974,000 patrons
- 33 Acquisitions Libraries
- 4 libraries currently outsource Tech Services from 3 Vendors



The Problem



- 1 Library Outsourced Technical Services
- 50 other libraries still catalog and process own material
- Vendor cataloged bibliographic records not well received by member libraries



The Solution

Use the Load Table to load items and bibs without overlaying fully cataloged records.

Zombie Emergency Procedure

In case of Zombie Apocalypse:



95% of all known zombies can be stopped by decapitation or destroying the brain. Aim your desperate, improvised weapons at the head and neck.

DO NOT SPLIT UP!

Someone WILL get killed, turn into a zombie and the next person to see them will go "Oh, it's my friend, I'll just turn my back and OH GOD WHY IS HE EATING MY BRAIN?!"



DO NOT USE FIRE

The only thing worse than undead hordes trying to eat your brain is undead hordes trying to eat your brain WHILE ON FIRE.



What is CLS?



What is CLS?

- CLS refers specifically to Baker & Taylor's Customized Library Services program. In this presentation I use it generically to cite all of our shelf ready programs.
- CLS programs generally offer full levels of shelf ready processing, including cataloging and bibliographic records (for the most part), item records, barcoding, labels, stickers and stamping, cases and coverings. Different vendors offer varying levels of service and some only work with certain types of materials.
- Depending upon your level of comfort with the CLS process, once you have set up the parameters to your satisfaction, your workflow could theoretically be almost hands off from the point of order to checking in the items.



What is CLS?

- Vendors can usually integrate existing standing and automatic order plans into their CLS workflow.
- At Patchogue-Medford Library we have been working with Baker & Taylor's CLS program for about 4 years now. Midwest Tape for about 2 years. Brodart McNaughton "rent-a-book" for approximately 6 months. We will Talk to Recorded Books later in the spring.
- Baker & Taylor provides a "soup to nuts" CLS service. They do everything from searching bibliographic utilities, downloading and editing records to original cataloging of materials (\$10 charge per item) to full physical processing.



What is CLS?

- Baker & Taylor also catalogs Spanish-language titles.
- Other companies provide a mix of services. Midwest gives us full physical processing and item records, but they do not do original cataloging. Their bib records come from OCLC, which may or may not be complete.
- Brodart also offers a full suite of cataloging and processing services, though we only receive physical processing and item records from them.



What is CLS?

- Information on shelf-ready offerings from vendors can be found at:
- Baker & Taylor <http://cls.baker-taylor.com>
- Midwest Tape <http://www.midwesttape.com/ediordering>
- Brodart <http://www.brodartbooks.com/library-cataloging-amp-processing/cataloging-processing/page.aspx?id=100138>
- If you already work with any of these companies give your sales rep a call. I'm sure they could point you to the right person.



What happened at the Patchogue-Medford Library?



Why CLS at Patchogue-Medford Library?

- Many Tech Services employees getting ready to retire.
- Collections usage and comprehensiveness were just not what they used to be. We no longer needed the staff, space, and resources to do the same work in Technical Services.
- New director felt that a new philosophy was needed. Staff should go out in the community more. People were less likely to come to us. We need to go out and engage them and let them know all the services we offer and that we are not just books.



Setting up up a CLS service

- Fill out a Customer Needs Assessment (CNA) form with your requirements.
- In a couple of weeks the vendor will get back to you with a non-binding price quote. It is usually per item. You can negotiate various services and options to lower the price, but remember that for many full CLS programs the largest part of the price is labor to search for, catalog, and process items.
- If you decide to accept the quote, the vendor will arrange at least one conference call or site visit to iron out the details.
- Several small test orders will follow to make sure items and records are arriving as they should be.
- Many, many emails and/or telephone calls between you and vendor will probably ensue to iron out more details. Dozens of email threads with dozens of messages.



Setting up a CLS Service

- Unless you have very simple cataloging and processing requirements, plan on it taking at least a few months to get everything right in the setup.
- If you are a larger library it is probably worth it to set up a CLS program in stages. At Patchogue-Medford we started with adult books, then after we found everything working right, we added young adult books and finally, children's books.
- Before doing CLS, take some time to cleanup locations, funds, call numbers, etc. Makes it easier to get a handle on things.
- CLS services will only do new items, no retrospective conversion of existing collections.



Workflow at Patchogue-Medford Library

- Various librarians create carts in vendor clients and transmit them to Technical Services account for ordering.
- Only a small number of staff are actually allowed to transmit orders to vendors. Most libraries find this to be a best practice as it will cut down on duplicate orders and the sometime problem of orders overwriting each other.
- Tech Services double checks order carts to try to find any mistakes, such as missing grids, ordering AV material from B&T, etc.
- Tech Services goes through ordering procedure as follows.



How does a CLS order work?

- Go into vendor's client, such as B&T Title Source 360, and create a cart(s) of materials you want to order.
- Grid the cart with locations and funds and then download "one-click MARC" order records into your ILS, which contains information such as location, fund, price, quantity, etc. In our system the order records come in with a status of "1"
- Within a few minutes, login to Sierra and go into Selection Lists and create a list of those "status 1" order records you just downloaded. Then go into Print/Send Orders and FTP the order to the vendor. This is the point at which the vendor actually receives the order.
- After about 10-15 minutes you can go back into Sierra to receive a status report on your order with fulfillment status.



Receiving in a CLS Order

- Our receiving process is not hands-off, but it probably could be if we wanted to work that way at least for Baker & Taylor and Brodart.
- We open boxes and check to make sure everything that we are paying for is there.
- We go into Place Orders Function and scan each item by standard number to open up the order record and fill in the Cdate and Rdate. Clerks look for any obvious mistakes in processing and cataloging. Clerk also checks order to see if any librarian provided instructions were followed.
- Clerk date stamps each book, so in future we know when to pull a “NEW” item and make it “old.”
- Clerk downloads electronic invoice from vendor FTP site and pays it in Sierra. We still receive a paper copy of each invoice with the shipment, since our business office needs it for their records and audit.
- Clerk checks in items in Sierra and sends holds to circ desk or ILL bags. Items with no holds are sent to librarian’s offices for them to examine before they are shelved.



Lessons Learned

- Vendors are not perfect. They will make mistakes. They are also ready, willing and able to acknowledge and fix mistakes.
- Vendors all do really nice work, almost all the time. Vendor CLS departments and reps are really service oriented and eager to please.
- CLS programs can be almost completely hands off, but that depends on your comfort level, staffing and workflow.
- We have found that the quality of CLS records is high. In the beginning we would carefully examine bibliographic records for completeness and accuracy. We no longer do so.
- We still do a fair amount of error checking of CLS materials for cataloging issues, such as call numbers, but will likely try to automate more in the future.



Lessons Learned

- “On Sale Date Items.” We receive approximately 80% of the new “Tuesday” books from B&T prior to the sale date. The rest by the end of the week at the latest. That is why we work with Brodart McNaughton. With our Midwest orders we rarely miss an on sale date.
- Electronic invoicing is wonderful! What a time saver!
- NEW stickers are always a problem.
- CLS has let the Technical Services staff concentrate on some of our more specialized collections in law, music, and genealogy.
- We were able to consolidate Technical Services department space and now we have much-needed additional program and study/conference room space.



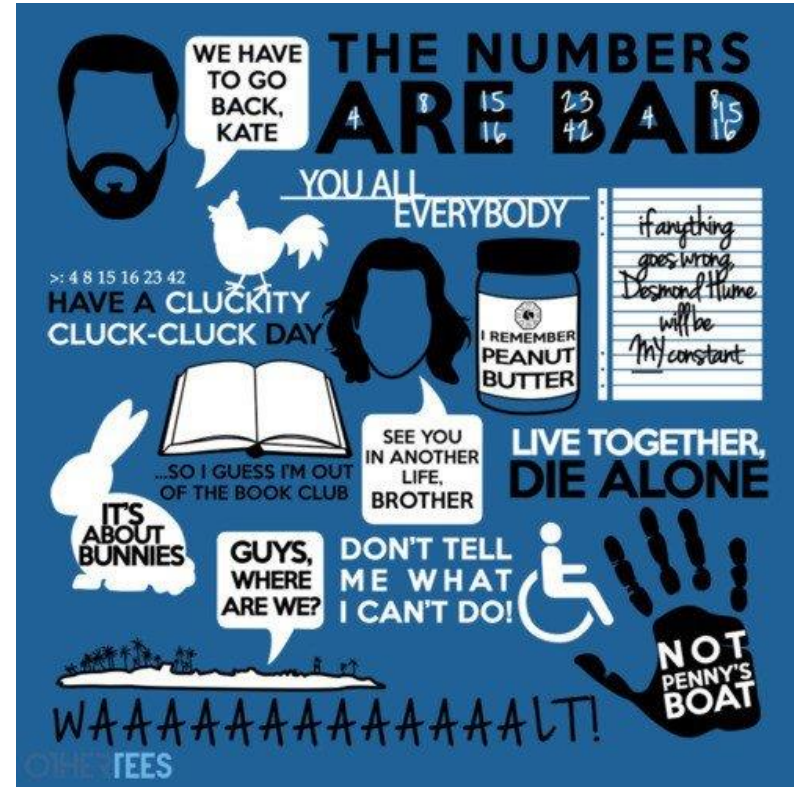
Functions and Setup



Acquisitions Functions

- Quick Click Ordering
- Edifact Ordering and Invoicing
- Selection Lists
- Print/Send Orders
- Status Reports
- Import Invoices

*Consult documentation for details



Library Responsibility

- Contact vendor
- Consult with vendor to configure accounts for EDIFACT and Shelf-Ready
- Create new Vendor Records for each account
 - VCODE3=d 'Edifact'
 - GIR CODE = 1 or 2 (vendor preference)
 - Note 2 or 3 = \$VENDSAN='xxxxxxx' (vendor preference)
- Setup Marc Profile on Vendor site (some vendors do this for you)
 - 96x fields, fund, location, and vendor codes
 - Order Status = 1 (very important!)
- Setup Item profile with vendor



Vendor Record Setup

v18008483 **Last Updated: 07-11-2014** **Created: 08-09-2013** **Revisions: 11**

CLAIMCYCLE	<input type="text"/>	RECEIPTS	<input type="text" value="0"/>	EPRICE CNCL	<input type="text" value="\$0.00"/>
VCODE1	<input type="text" value="- NONE"/>	INVOICES	<input type="text" value="0"/>	AVG WEEKS	<input type="text" value="0"/>
VCODE2	<input type="text" value="- NONE"/>	ORD CLMD	<input type="text" value="0"/>	DISCOUNT	<input type="text" value="0"/>
VCODE3	<input type="text" value="d EDIFACT"/>	CPY RCVD	<input type="text" value="0"/>	VENDOR MSG	<input type="text"/>
ORDERS	<input type="text" value="0"/>	ORD TOT	<input type="text" value="\$0.00"/>	LANGUAGE	<input type="text" value="eng English"/>
CLAIMS	<input type="text" value="0"/>	INV TOT	<input type="text" value="\$0.00"/>	GIR CODE	<input type="text" value="1"/>
CANCELS	<input type="text" value="0"/>	EPRICE RCVD	<input type="text" value="\$0.00"/>		

VENCODE

VENNAME

ACCTNUM

ADDRESS1

NOTE2



Vendor Responsibility

- Offer EDIFACT Ordering and Invoicing
- Configure accounts for EDIFACT
- Set up MARC profile for all accounts (96x values provided by Library via System)
- Provide Account & SAN numbers
- Provide Vendor record configuration (GIR Code, Note 2 or 3)
- Create FTP Folders
 - Invoices & Reports
 - Item Load files
- Provide FTP logins
- Provide IPs for z39 access and FTP
- Catalog for unique items
- Create 949 field with item information based on library's specification



Marc Profile Setup

MARC Profile Setup for EDIFACT					
MARC	DELIMITER	VALUE	SIERRA DISPLAY	Field Name	SOURCE
960	a	p	PURCHASE	ACQ Type	DEFAULT
960	c	-	NOT USED	Code 1	optional
960	d	-	NOT USED	Code 2	optional
960	e	-	NOT USED	Code 3	optional
960	f	-	NOT USED	Code 4	optional
960	g	-	NOT USED	Form	library supplied
960	h	-	NOT USED	Order Note	optional
960	i	f	FIRM	Order Type	DEFAULT
960	k	a-z, 1-6	4-5 alpha char A-Z	RLOC	library supplied, system defined
960	l	a-z, 1-6	4-5 alpha char A-Z	BLOC	library supplied, system defined
960	m	1	ON HOLD	STATUS	EDIFACT DEFAULT
960	o	1-99	1-99	Copies	library supplied
960	p		BLANK	CDATE	Supplied on download
960	q	MMDDYYYY	MM-DD-YYYY	ODATE	system supplied
960	r		BLANK	RDATE	DEFAULT
960	s	\$0.00	\$0.00	E PRICE	vendor supplied - list price
960	t	5 alpha char	A-Z	LOCATION	library supplied, system defined
960	u	alpha & num	A-Z, 1-99	FUND	library supplied, system defined
960	v	5 alpha char	A-Z	VENDOR	library supplied, system defined
960	w	eng	ENGLISH	LANG	DEFAULT
960	x	xx	COUNTRY UNKNOWN	COUNTRY	DEFAULT
960	y	1	1	VOLUME	DEFAULT
961	c	alpha & num	variable length text	Note or Cart name	Vendor supplied
961	d	alpha & num	variable length text	INT Note	vendor supplied
961	f	alpha & num	variable length text	Selector	optional
961	h	alpha & num	variable length text	VEN NOTE/PO PER LINE	system supplied?
961	j		variable length text	PO Name	vendor supplied
961	l		variable length text	REQUESTOR	??
961	m		variable length text	Blanket PO #	Used for EDI



System Administration Responsibility



MAKE IT HAPPEN*

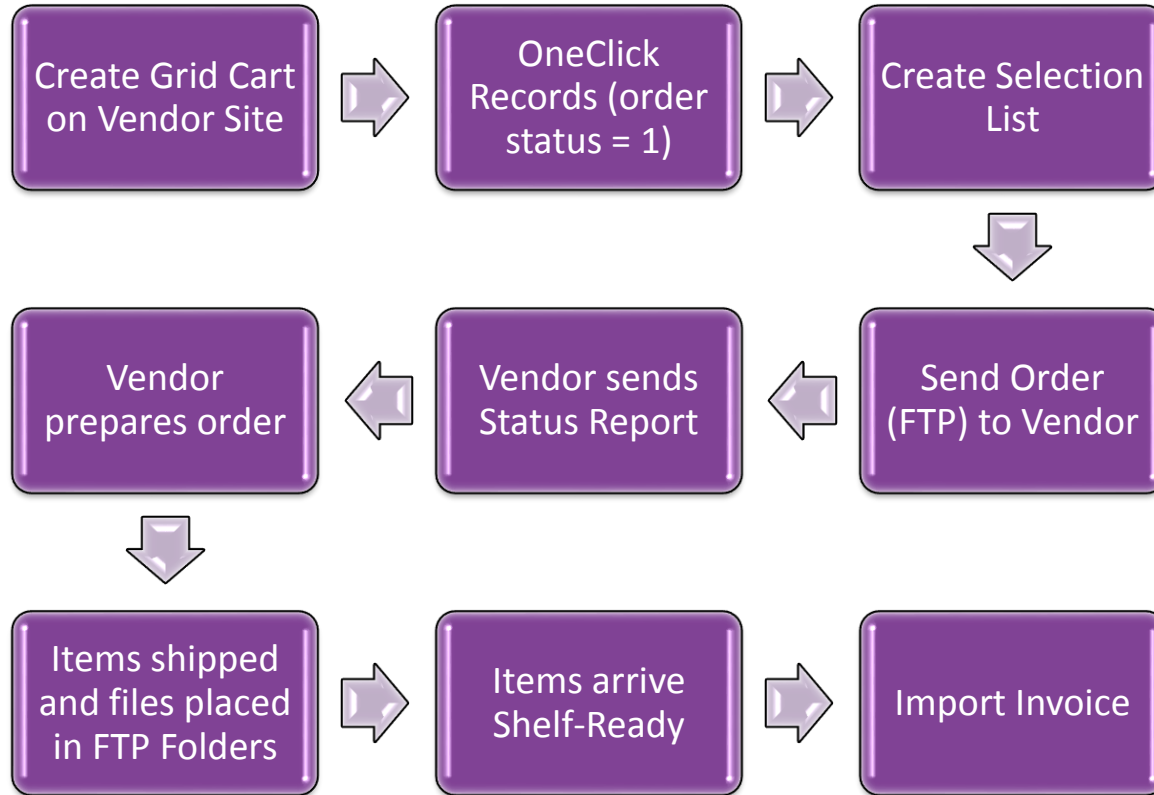


*System Administration Responsibility

- Setup load tables
- Add Vendor IP to tables
- Add Vendor SAN to Library SAN File
- Provide MARC Profile & Quick Click FTP setup info to Library
- Contact vendor for additional configuration (as needed)
- Alter/re-configure MARC Profile on Vendor site (as needed)
- Train library staff
- Test orders, invoices and item loading



The Process



Record Profiling & Loading

- Matching on Order Number
- Loading Item records-mapping fixed and variable fields
- Overlaying brief bibliographic records while protecting existing fully cataloged records



THE PROCESS

VENDOR

- Creates file of MARC records
- Puts files of MARC records on their ftp server
- Sends email notification to UC department and library

UNION CATALOG

- Retrieves files from ftp server
- Loads files in Data Exchange (logged in as library)



Load Table Specifics

- Records match on Order number in the 907 field using the Idx trigger
- Item field values are loaded based on the values in the 949 1 subfields



Raw Data Example

LEADER 01309pam 2200349 i 4500

DIRECTORY

001001300000 003000400013 005001700017 008004100034 010001700075
020002900092 040003000121 042001400151 050002500165 082001400190
100002900204 245003200233 250001900265 264004300284 300002400327
336002600351 337002800377 338002700405 490002500432 520021000457
650003900667 650001900706 650001300725 800003900738 856010600777
907001500883 949006100898

TAGS

1 000 01309pam 2200349 i 4500@
2 001 2015021393@
3 003 DLC@
4 005 20161101123551.0@
5 008 150924s2016 nyu d 000 1 eng @
6 010 |a 2015021393@
7 020 |a9781250044655 (hardback)@
8 040 |aDLC|beng|cDLC|erdajdGCmBT@
9 042 |apcc|alcac@
10 050 0 0 |aPZ7.M571737|bHe 2016@
11 082 0 0 |a[Fic]223@
12 100 1 |aMeyer, Marissa,|eauthor.@
13 245 1 0 |aHeartless /|cMarissa Meyer.@
14 250 |aFirst edition.@
15 264 1 |aNew York ;|bFeiwei and Friends,|c2016.@
16 300 |a453 pages ;|c24 cm.@
17 336 |atext|btxt|2rdacontent@
18 337 |aunmediated|bn|2rdamedia@
19 338 |avolume|bnc|2rdacarrier@
20 490 1 |aThe Lunar chronicles@
21 520 |aln this prequel to Alice in Wonderland, Cath would rather open a bakery and marry for love than accept a proposal from the King of Hearts, especially after meeting the handsome and mysterious court jester.@
22 650 1 |aCharacters in literature|vFiction.@
23 650 1 |aLove|vFiction.@
24 650 1 |aFantasy.@
25 800 1 |aMeyer, Marissa.|tLunar chronicles.@
26 856 4 2 |3Cover image|uhttp://www.netread.com/jcusers2/bk1388/655/9781250044655/image/lqcover.9781250044655.jpg@
27 907 |a.o93386023@
28 949 1 |aYA FIC MEYER|j30643005702031||pmyfc|t2|p19.99|q220|r1|sp@



949 Subfield

949 1 YA FIC MEYER Call#	 i30643005702031 Barcode	 lpmyfc Loc code	 t2 ITYPE	 p19.99 Price	 q220 ICODE1	 r1 ICODE2	 sp Status
------------------------------------	------------------------------------	----------------------------	---------------------	-------------------------	------------------------	----------------------	----------------------



949 1 YA FIC MEYER

|i30643005702031

|lpmyfc

|t2

|p19.99

|q220

|r1

|sp

Call#

Barcode

Loc code

ITYPE

Price

ICODE1

ICODE2

Status

Load Table lines:

```

|||0|0| | |0|n|G|0|@link="i:1:949"
/^949 1|||0|5|i| |79|n|N|1|#com="loc"
/^949 1||q|0|0|i| |59|n|N|1|#com="i1"
/^949 1||r|0|0|i| |60|n|N|1|#com="i2"
/^949 1||t|0|0|i| |61|n|N|1|#com="ty"
/^949 1||p|0|0|i| |62|n|N|1|#com="pr"
/^949 1||s|0|1|i| |88|n|N|1|#com="sta"
/^949 1||u|0|1|i| |97|n|N|1|#com="im"
/^949 1||g|0|3|i| |58|n|N|1|#com="cop"
/^949 1|082|ab|0|0|i|c|0|y|N|1|
/^949 1||i|0|0|i|b| |n|N|1|#com="i/a"@item

```

Fixed-Length Field Numbers

Data Fields	Holds	Fines
Fixed Fields		
58 COPY #	59 ICODE1	60 ICODE2
61 I TYPE	62 PRICE	63 OUT DATE
64 OUT LOC	65 DUE DATE	66 PATRON#
67 LPATRON	68 LCHKIN	70 IN LOC
71 # RENEWALS	72 # OVERDUE	73 ODU DATE
74 IUUSE3	75 RECAL DATE	76 TOT CHKOUT
77 TOT RENEW	78 LOUDDATE	79 LOCATION
87 LR	88 STATUS	93 INTL USE
94 COPY USE	97 IMESSAGE	108 OPACMSG
109 YTDCIRC	110 LYRCIRC	81 RECORD #
83 CREATED	84 UPDATED	85 REVISIONS
Variable Fields		
v VOL	c CALL #	y MARC
8 HOLD	b BRCD	m MESSAGE
x NOTE	4 VIRTUAL RECORD	6 COURSE ID
r RESV. NOTE	u INV INFO	1701 Save Item Itype
1702 Save Item Location	1703 Save Item Checkout Total	1301 Old Location
!	MARC Tag	



ITEM LOADED

949 1 YA FIC MEYER |i30643005702031 |lpmyfc |t2 |p19.99 |q220 |r1 |sp
Call# Barcode Loc code ITYPE Price ICODE1 ICODE2 Status

i254273464 Last Updated: 12-31-2016 Created: 11-16-2016 Revisions: 9

COPY #	0	LCHKIN	12-06-2016 12:38PM	LOCATION	pmyfc PM-Young Adult Area
ICODE1	220	IN LOC	239	LR	0
ICODE2	1 ADULT FICTION	# RENEWALS	0	STATUS	- AVAILABLE
I TYPE	2 Default Circ	# OVERDUE	0	INTL USE	0
PRICE	\$19.99	ODUE DATE	- -	COPY USE	0
OUT DATE	- - :	IUSE3	0	IMESSAGE	- NO MESSAGE
OUT LOC	239	RECAL DATE	- -	OPACMSG	- ---
DUE DATE	- -	TOT CHKOUT	1	YTDCIRC	0
PATRON#	0	TOT RENEW	0	LYRCIRC	1
LPATRON	2805981	LOUTDATE	11-16-2016 03:50PM		

CALL # 082 1 YA FIC MEYER
MARC 949 1 YA FIC MEYER|i30643005702031|lpmyfc|t2|p19.99|q220|r1|sp
BRCD 30643005702031



VENDOR SPECIFICS

- CLS (B&T) searches our database first and delivers two files
 - “ADD” MARC file-If they find a full record in our database they add the record to the “ADD” MARC file (only need the item info)
 - “NEW” MARC file-If they find a brief record they add a fully cataloged record to the “NEW” MARC file (need the FULL bib)



THE PROBLEM

51 libraries authorized to create and edit Bibs

From the time B&T searches our database and delivers the file of FULL/NEW records our catalogers may have already enhanced the brief record to be a fully cataloged MARC record.

Needed to protect fully cataloged records from being overlaid.



LOAD PROFILING

Created two load tables

- One table ONLY attaches item records
- Second table overlays only the BRIEF bib records based on the EncLvl in the bib record



LOADING PROCESS

- All MARC files are loaded using the table to attach items
- All NEW MARC files are loaded a second time using the bib overlay table



OVERLAYING BASED ON ENC LVL

- Load table uses @ov_priority to compare the EncLvl in the existing bib record and the incoming bib record
- If the EncLvl in the existing bib is greater than the incoming bib record the incoming record will be rejected
- If the EncLvl in the existing bib is less than the incoming record the existing bib record will be overlaid



Encoding level is position 17 in the Leader

LANG eng English XXXXX 67 MAT TYPE a BOOK
SKIP 0 CAT DATE 01-03-2017 BCODE3 e BACKSTAGE ENHANCED
LOCATION multi AUDIENCE j JUVENILE LEVEL COUNTRY nyu New York

MARC Leader

REC LENGTH	#####	REC STAT	c	REC TYPE	a
BIB LEVEL	m	ARC CTRL		CHAR ENC	
IND CNT	2	SFLD CNT	2	BASE ADDRESS	#####
ENC LEVEL		CAT FORM	i	MULTIPART	
LEN FIELD	4	LEN START	5	LEN IMPL	0
UNDEFINE	0				

LOCATIONS

amaw2,bbyg,blygn,bpygn,bwys
,hbyg,hfygn,hmyw1,hpygn,lsav
nsyw5,pygn,pmyfc,rmygn,rvygn
,soygn,syfc,wbaw3,wbqqq,wh

SOURCE	001	0016825816
MARC	005	20170103112823.0
MARC	008	150924 t 2016 2016 nyu a
LCCN	010	2015021393
STANDARD #	020	9781250044655 (hardcover)
STANDARD #	020	1250044650 (hardcover)
MARC	040	dsm dlw dUtOrBLW
MARC	050	0 0 PZ7.M571737
MARC	082	0 0 [Fic]
AUTHOR	100	1 Meyer, Marissa, eauthor.
TITLE	245	1 0 Heartless cMarissa Meyer.
EDITION	250	First edition.
PUBLISHER	264	1 New York : bFeiweil & Friends, c
PUBLISHER	264	4 c©2016

50259969

Select

- Full level
- 1 Full level, material not examined
- 2 Less-than-full level, material not examined
- 3 Abbreviated level
- 4 Core level
- 5 Partial (preliminary) level
- 7 Minimal level
- 8 Prepublication level
- u Unknown
- Not applicable
- l OCLC - Full-level input by participant

OK Cancel



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“

Here blank is the highest priority, followed in order by 1, 2, 3, etc.

“This routine sets the priority of encoding level values contained in byte 17 of the MARC Leader of incoming bibliographic records. This is consulted when a matched record is to be overlaid based on @ov_action. The format is a list of colon-separated values in descending order of priority, reading from left to right.”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“

|||0|0| | |0|n|G|0|@ov_action=“u”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

```
|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“
```

```
|||0|0| | |0|n|G|0|@ov_action=“u”
```

REJECT,OVERLAY,REJECT

“Determines how to process the incoming record depending on how many matches were found on the @ov_tag value.” “When using any of the @ov_priority functions the value of @ov_action must indicate an OVERLAY”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“

||0|0| | |0|n|G|0|@ov_action="u”

||0|0| | |0|n|G|0|@ov_priority_action="r”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

```
|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“
```

```
|||0|0| | |0|n|G|0|@ov_action="u”
```

```
|||0|0| | |0|n|G|0|@ov_priority_action="r”
```

REJECT the record if incoming < existing

“Specifies the action to be performed if the incoming record’s encoding level (as determined by @ov_priority) is less than the record to be overlaid.”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

```
||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“
```

```
||0|0| | |0|n|G|0|@ov_action="u”
```

```
||0|0| | |0|n|G|0|@ov_priority_action="r”
```

```
|||0|0| | |0|n|G|0|@ov_priority_type="e”
```



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“

|||0|0| | |0|n|G|0|@ov_action="u”

|||0|0| | |0|n|G|0|@ov_priority_action="r”

|||0|0| | |0|n|G|0|@ov_priority_type="e”

Overlay if incoming priority is Greater than Existing priority (if blank nothing is higher, will not be overlaid)

“Specifies the action to be performed based on the results of @ov_priority_tag’s comparison of priorities of the incoming record versus the record to be overlaid.”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“

||0|0| | |0|n|G|0|@ov_action=“u”

||0|0| | |0|n|G|0|@ov_priority_action="r"

||0|0| | |0|n|G|0|@ov_priority_type="e"

|||0|0| | |0|n|G|0|@ov_rec_number=“r”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

```
|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J"
```

```
|||0|0| | |0|n|G|0|@ov_action="u"
```

```
|||0|0| | |0|n|G|0|@ov_priority_action="r"
```

```
|||0|0| | |0|n|G|0|@ov_priority_type="e"
```

```
|||0|0| | |0|n|G|0|@ov_rec_number="r"
```

Reject if it doesn't find the .o number [if .o# is missing will catch on item load]

“Specifies the action to be performed if an overlay is done on an Innovative record number via the @Idx trigger and the overlay fails. Also specifies the action to take if an overlay fails due to a bad check digit in the record to be overlaid.”



LOAD TABLE PROFILE FOR “NEW” @ov_priority lines in load table

|||0|0| | |0|n|G|0|@ov_priority=" :1:2:3:4:5:7:8:u:z:l:K:L:M:E:J“

|||0|0| | |0|n|G|0|@ov_action=“u”

|||0|0| | |0|n|G|0|@ov_priority_action="r"

|||0|0| | |0|n|G|0|@ov_priority_type="e"

|||0|0| | |0|n|G|0|@ov_rec_number="r"



OTHER STUFF

- Catalogers in the county and UC staff ensure that the EncLvl is made full when cataloging, enhancing or importing bib records.
- CLS sets the EncLvl to “blank”=full on their full records.
- Globally update “OneClick” records to EncLvl=brief.
- 949 1 subfields contain item information, common error is missing second indicator of 1, record will not load
- Subfield information CS Direct
 - “Transferring records into innopac from bibliographic utilities”

https://csdirect.iii.com/manual/Default.shtml#i_dbmaint_specifying_item.html



Questions?

