

Sirsi-Batch loading

Loading record batches to Unicorn

While this methodology does not make sense for the small numbers of records one usually works with in copy cataloging operations, when loading larger sets such as YBP approval books, NetLibrary titles, GPO Shipping List records, or batches of original records from OCLC, it is much simpler to use MARC Import and the *bibload* report then to bring the records in one at a time through SmartPort. Unicorn can load MARC records in both communication format and as formatted text files.

MARC communication format loads

1. With desired upload file on your PC or network, select the *MARCIMPORT* wizard.
2. From the *Marclmport : Properties* box, accept the default values and click OK.
3. From the *Marclmport Utility : Main* box, click on *Bibliographic data and Import*.
4. From the *Marclmport Utility : Import Bibliographic Data* box, click on the *OTHER* box and identify the MARC file awaiting upload using the Source gadget (diamond-shaped button to right of Source window). Make sure that the *MARC* radio button has been selected.
5. Provide a filename you can remember in place of OTHER.MARC. This could be your initials and date (cp031117.marc) or a name indicating the content or purpose of the load (YBP1125.marc, GPOurl0312.marc, NetLibraryMay.marc). Media should read pcdiskette even when you are working with a networked file.
6. Click *OK* and answer *Yes* to "Is diskette ready?". Answer *No* to the question on more files to upload or they will be appended to the present file. A text file, listing the number of records loaded, will pop up. The top section refers to bibliographic records loaded while the bottom is for authorities.
7. Go back into WorkFlows and you should see your uploaded file listed in the *Marclmport Utility : File list*
8. Cancel and *Exit* your way out of *MARCIMPORT* and you are ready to run *bibload*, instructions for which are in a separate section below.

Loading database output and flat ASCII formatted text

Follow the instructions above, but at step 4 select the *SIRSI* file type and click on the *Flat ASCII* radio button.

Sirsi specifies the following format for ASCII text input:

```
.[MARC tag]. Ind1Ind2|aText|bText
```

Each bibliographic record in the input file must begin with a document boundary statement and the name of the FORMAT being used (MARC, SERIAL, MANUSCRIPT, MAP, MRDF, MUSIC, VM):

```
*** DOCUMENT BOUNDARY ***  
FORM=MARC
```

The following illustrates a typical MARC record presented as ASCII text to MARCIMPORT:

```

*** DOCUMENT BOUNDARY ***
FORM=MARC
.007. |acr an-----
.008. |a030622s2003 ncuab m 000 eng d
.040. |aNRC|cNRC
.100. 1 |aByrd, Erick T.|q(Erick Tilghman),|d1973-
.245. 13|aAn analysis of variables that influence stakeholder participation
and support for sustainable tourism development in rural North
Carolina|helectronic resource /|cby Erick T. Byrd.
.260. |c2003.
.300. |axxi, 272 p. :|bill., map.
.502. |aThesis (Ph.D.)--North Carolina State University.
.504. |aIncludes bibliographical references (p. 140-146).
.500. |aIncludes vita.
.520. |aKeywords: stakeholders, development, tourism, sustainable
tourism.
.650. 4|aNorth Carolina State University|xTheses|xParks, Recreation and
Tourism Management.
.856. 4|yFull text
(pdf)|uhttp://www.lib.ncsu.edu/theses/available/etd-11122003-102451/unrest
ricted/etd.pdf
.948. |c5/11/2003
.949. |wETD|mONLINE|lNET|tDISSERTN|zNCSUTHESIS

```

Bibload report

While MARCIMPORT prepares MARC or text data for use by the system, it takes a second report from the MARC Import group to actually load the data into the database. There are reports which do pretty much the same thing, *bibload* and *bibloadbatch*. The latter is intended for far larger batches in the range of several thousands.

1. Select the *Schedule new report* wizard and, within that, the *MARC Import* tab.
2. Select *Load Bibliographic Records* and click the *Schedule* button.
3. On the *Schedule New Reports* : *Create bibload* box you will find three tabs. On the *Basic Information* tab provide a Report name you will remember when looking at the finished reports later on.
4. On the *Selection Criteria* tab, first identify the file you imported above, specifying whether it was a MARC or FLAT (ASCII text) file.
5. Under *Title control processing* select the appropriate sources for incoming flexkeys using the gadget to the right of the data entry window. For OCLC original records this will be OCLC number (001); for other records this could be ISBN (020), OCLC number (035), or another appropriate source.
6. A *Title control number matching rule* table is provided below. Select the rule appropriate to the overlay/new record outcome you desire
7. You may select to use *TODAY* under *Date cataloged* or you could set this to the previous month if you desire to prevent the file from going to Marcive for authority processing and OCLC for holdings setting.
8. *Default record format* can be set to anything, allowing MARC leader to set the format.
9. Under *Update title control information* enter 948.
10. Under *Bibliographic record processing* check *Update bibliographic record* and *Remove junktags*.
11. Under *Call number and copy processing* leave *Holdings entry preprocessing* set to *NONE*. Set *Copy processing* to either create or update holdings. If you are loading new records with holdings information imbedded in 949, choose *Create and update copies using holdings statement _and put the holdings tag (usually 949) in the _Entry ID* window. *Call number load rules* are set in the format used for SmartPort (Class scheme, MARC tag, subfields, occurrence).
12. With *Default holding code* you can set all records to load particular values for library, location, item type, and item categories according to the *Holding code table*.
13. Click on *Schedule* to schedule the load. For files of less than several hundred, go ahead and use *Once*. If you are worried about causing other reports to queue up, you can schedule the load to occur after hours. Click on *OK* and the report is off and running.
14. To check the status of your report, click on the *Finished reports* wizard. If your report is done it will show up on the list. If not you can click the middle icon at the upper left of the *Finished report* box to *Display report scheduler status*. Single click on your report name and choose *View* to see your report.

Title control number matching rules

1	Create	Error	Error
2	Create	Overlay	Error
3	Error	Overlay	Error
4	Create	Overlay	Overlay
5	Error	Overlay	Overlay

External use of MARC 949 to generate holdings

If you are cataloging a number of titles on OCLC or need to batch load records from a vendor like Marcive, NetLibrary, or Yankee Book Peddler, it may be faster to key holdings information into a MARC 949 field and then to use MARCIMPORT and the bibload report to create both title AND call/item records in Unicorn. This is the methodology that UNC-CH and Duke have used for all of their current DRA cataloging since 1993. It is also the method we currently use for batch loading GPO MARC record sets from Marcive, NetLibrary e-book titles, and large microform sets such as the Evans Collection.

For loading into Unicorn, a 949 needs to be created for each call number record associated with a title. Thus, for each volume of a multi-volume set, for each additional library holding the title, and for each accompanying material type, a new 949 is created. The following table illustrates the subfields that map to various fields in the call number and item records in Unicorn.

Subfield	Contents	Default
a	Call number	Call # specified in load statement
w	Class scheme	LC
v	Volume number	None
c	Copy number	1
d	Last activity	MM/DD/YYYY
e	Date last charged	MM/DD/YYYY
f	Date inventoried	MM/DD/YYYY
g	Times inventoried	0
h	Holding code In place of separate Library, Location, Item type	None
i	Barcode	Auto barcode
j	Number of pieces	0
k	Current location	Home location
l	Home location	None
m	Library	None
n	Total charges	0
o	Item notes or comments	None
p	Price	0
q	In-house charges	0
r	Circulate flag	Yes
s	Permanent flag	Yes
t	Item type	None
u	Acquisitions date	MM/DD/YYYY
x	Item cat1	None
z	Item cat2	None

Note that while new volumes require a new 949, you can use a single 949 to create multiple copies with the same call number. Defaults in the table above refer to values automatically created when that subfield is not coded. Thus, leaving out the barcode subfield will cause an AUTO barcode to be generated. Leaving out the |w class scheme will result in a default to LC. Note also that one can use |h Holding codes in place of separate |m Library |t Location |l Item type |x Item cat1 |z Item cat2 combinations. Call number spacing here should be identical to what is used in manually created call records. A number of examples follow.

949 MF 875|wALPHANUM|tMICROFICHE|IMICROFORMS|xMICROFORM|mDHHILL

949 TT685 .V35 2000|mTEXTILES|tVID-CASS|IMEDIA|xVIDEO

949 TT685 .V35 2000 Brochures|mTEXTILES|tBOOK|IMEDIA|xBOOK

949 |wEBOOK|hNCLIVENETL

949 |wETD|mONLINE|tDISSERTN|INET|xNCSUTHESES

External use of MARC 948 to generate time stamps

Setting date stamps for DATE CREATED, DATE MODIFIED and DATE CATALOGED must be done in 948, much as call number information is set in 949. Format should be MM/DD/YYYY, as in WorkFlows.

Subfield	Contents	Default
a	Date title created	Date of load
b	Date title modified	Date of load
c	Date title cataloged	NEVER