Lightning Round: Moving Those MARCs: Workflows For Loading Library Catalog Holdings To A Discovery Layer

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Overview

• Initial Set-up

• Content Type Mapping

• Workflow Changes

• Problems

• Questions
Initial Set-up

• Records must be exported from catalog in MARC-21 format

• Records must be UTF-8 encoded (requires service request to Innovative)

• Upload records in binary mode, not ASCII mode

• Full catalog holdings must be batched, not sent as separate, individual records
Content Type Mapping

- Critical to discovery—one way to filter results by facet “Content Type”
- Answers the question “What types of material does your library own?”
- Decide how you want materials to display. Exclude terms for items you do not own
Content Type Mapping

Decisions and Examples

• Exclude mapping to items you don’t own:
  • Streaming video

• Continuity with HopeCat display:
  • Audio Recording versus Music or Spoken Word Recording
  • Video Recording versus DVD

• Fix incorrectly mapped records:
  • Internet Resource versus CD-ROM: mapped both as Web Resource
Content Type Mapping

• Familiarize yourself with Leader (006), 007, and 008 MARC fields

• After loading records, review them in your discovery tool to see the display
Workflow Changes

• Quarterly, full catalog holdings sent (at suggestion of vendor)

• Daily updates and deletes sent--forced to reorganize our delete records workflow

• Maintenance of exclusions and deletions
Problems

• Staff size/dedicated time

• Too many records, our list of exclusions to discovery layer gets larger even as we want to include more

• Good and Bad: Mistakes in cataloging became apparent in 1Search

• Discovery layer indexing out of our control
Questions?

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