Adventures with Vandelay



Kathy Lussier, MassLNC Project Coordinator Evergreen International Conference 2012 April 27, 2012



Art Vandelay, Importer/Exporter



Why did MassLNC embark on this project?

MassLNC comprises 3 distinct consortia

- Central/Western Massachusetts Automated Resource Sharing (C/W MARS)
- Merrimack Valley Library Consortium (MVLC)
- North of Boston Library Exchange (NOBLE)
- Nearly 30 year history of centralized cataloging



Different needs to support

- MVLC central catalogers hand pick records from OCLC matching is the greatest concern.
- NOBLE batch importing records for e-books is a big concern.
- C/W MARS
 - Regularly importing batches from libraries on OCLC quality metrics are needed.
 - Greater likelihood of bringing on new libraries.



Development partners

King County Library System and SITKA



Sitka

MassLNC contracted with Equinox to perform the work



Disclaimer: I'm not a cataloger



<u>1</u> Server Settings +						
Go <u>B</u> ack Reload Go Forward						
Export Records 🔹 Import Records	👔 Inspect Queue 📲 Record Display Attributes 📲 Merge / Overlay Profiles 📲 Record Match Sets 📲 Import Item Attributes					
Evergreen MARC File Upload	Evergreen MARC File Upload					
Record Type	Bibliographic Records					
Create a New Upload Queue	or Add to an Existing Queue					
Record Match Set	▼					
Holdings Import Profile	▼					
Select a Record Source	ocic					
Record Import Actions						
Merge Profile						
Import Non-Matching Records						
Merge On Exact Match (901c)						
Merge On Single Match						
Merge On Best Match						
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality / Quality of Best Match					
Insufficient Quality Fall-Through Profile	▼					
File to Upload:	Browse_ Upload					

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File to Upload:	Browse Upload					

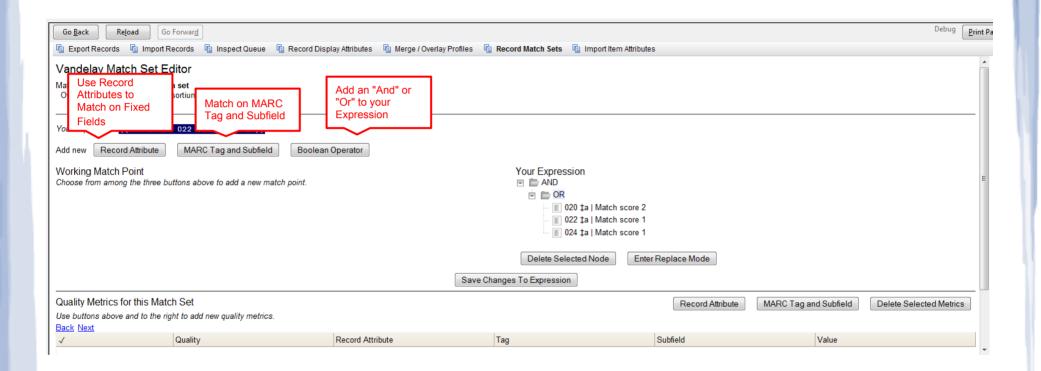
<u>1</u> Server Settings +	
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File to Upload:	Browse_ Upload
1	

Vandelay Record Match Set Editor

- Any MARC tag can be designated as a match point.
 - 020a and 022a are normalized to ignore any trailing text on incoming record.
- Record attributes, like item type or item form, can also serve as match points.
- Boolean operators allow you to identify which match points are required.

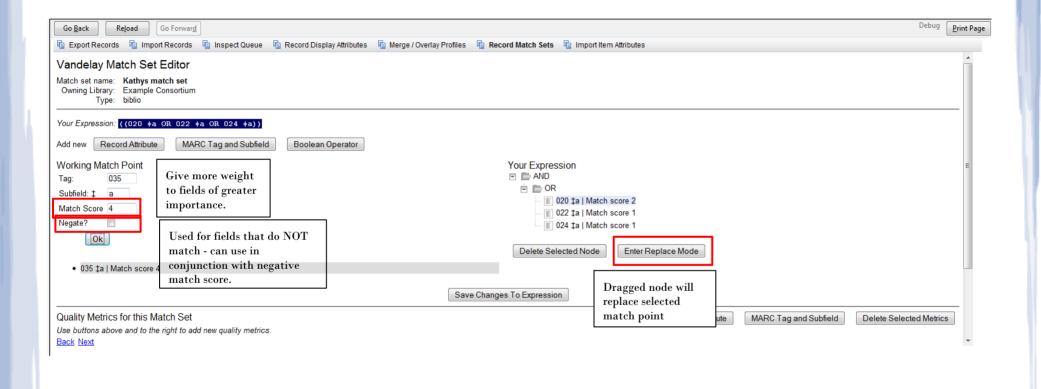


Vandelay Record Match Set Editor





Vandelay Record Match Set Editor





More on Record Attributes

- Evergreen is seeded with default record attributes, including those based on fixed fields.
- Cases where you may want to create your own via Server Administration < MARC Record Attributes.
 - Match points for MARC tags that don't contain a subfield (001 tag).
 - Match points for non-repeatable fields where the text needs to be normalized (010 tag).



Record Attribute for 001 field

Name	oclcnumber
Label	OCLC Number
Description	
Filter?	\checkmark
Fixed Field	
Format	▼
Joiner	
MARC Subfields	
MARC Tag	001
Physical Characteristic	
Sorter?	
Starting Position	
String Length	
XPath	



Go Back Reload Go Forward	
Export Records 📳 Import Records	👔 Inspect Queue 📲 Record Display Attributes 🖷 Merge / Overlay Profiles 🖷 Record Match Sets 🛱 Import Item Attributes 👘
Evergreen MARC File Upload	
Record Type	Bibliographic Records 🔹
Create a New Upload Queue	Apr_22_2012 or Add to an Existing Queue
Record Match Set	Kathys match set
Holdings Import Profile	
Select a Record Source	oclc
Record Import Actions	
Merge Profile	
Import Non-Matching Records	
Merge On Exact Match (901c)	
Merge On Single Match	
Merge On Best Match	
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	
File to Upload:	Browse_ Upload

Import Item Attribute Definitions

- Identify the MARC tag and subfields that contain your copy data.
- At a minimum, you should identify:
 - MARC tag that contains holdings data
 - Subfields for circulating library, owning library, call number, barcode.



Import Item Attribute Definitions

🖷 Export Records 🖷 Import Records 👘 Inspect Queue 🖷 Record Display Attributes 🖷 Merge / Overlay Profiles 🖷 Record Match Sets 👘 Import Item Attributes

Import Item Attribute Definitions

Context Org Unit BR1 -

Back Next				-																	
Barcode	Call Number	Circulate	Circulate As MARC Type	Circulating Library	Circulation Modifier	Copy Number	Deposit	Deposit Amount	Holdable	Keep	Name	OPAC Visible	Owner	Owning Library	Price	Private Note	Public Note	Reference	Shelving Location	Status	Tag
i	а	r		[@code="x"	't				r	False	949 holdings field	r	1	[@code="x"]	р	n	z	r	I	s	949
р	j	[@code = "x" and text() = "circulating	i	[@code = "b"][2]	g	t	d	k	[@code = "x" and text() = "holdable"]	False		[@code = "x" and text() = "visible"]	1	[@code = "b"][1]	У	I	m	[@code = "x" and text() = "reference"]	с	z	852
i	а				t					False	Unicorn Import format 999		1	m	р				I	k	999

New Definition

Delete Selected



<u>1</u> Server Settings						
Go Back Reload Go Forward						
Export Records 🔹 Import Records	🔋 Inspect Queue 🛛 🔋 Record Dis	play Attributes	🖺 Merge / Overlay Profiles	🔋 Record Match Sets	🔋 Import Item Attributes	
Evergreen MARC File Upload	Evergreen MARC File Upload					
Record Type	Bibliographic Records					
Create a New Upload Queue	Apr_22_2012	or Add to an	Existing Queue	•		
Record Match Set	Kathys match set					
Holdings Import Profile	949 holdings field]				
Select a Record Source	oclc 🗸					
Record Import Actions		_1				
Merge Profile	•]				
Import Non-Matching Records						
Merge On Exact Match (901c)						
Merge On Single Match						
Merge On Best Match						
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality / Qua	ality of Best Mate	ch			
Insufficient Quality Fall-Through Profile	•					
		_				
File to Upload:	Bro	wse Up	load			
	_					

Merge/Overlay Profiles

- Identify which fields should be imported from incoming record and which should be preserved on existing record.
- Vandelay is now seeded with two merge/overlay profiles:
 - Default merge No fields from incoming record are added to match. Useful for item loads.
 - Default overlay Incoming record will replace existing record.



Merge/Overlay Profiles

- Available options include:
 - Preserve specification fields in existing record that should be preserved.
 - Replace specification fields in existing record that should be replaced by those in incoming record.
 - Add specification fields from incoming record that should be added to existing record (in addition to any already there.)
 - Remove specification fields that should be removed from incoming record.
- You can add multiple tags to these specifications, separating each tag with a comma.



Merge/Overlay Profiles

G	Go Back Reload Go Forward Go Forward						
🖷 Export Records 🧌 Import Records 🖷 Inspect Queue 🦷 Record Display Attributes 🖷 Merge / Overlay Profiles 🖷 Record Match Sets 🖷 Import Item Attributes							
Overlay / Merge Profiles Context Org Unit BR1							
	<u>k Next</u> Name	Owner	Preserve Specification	Replace Specification	Add Specification	Remove Specification	Min. Quality Ratio
	Default Merge	CONS		901c			
	Default Overlay	CONS	901c				
	New 856	CONS			856		
	Preserve Summary and Contents	CONS	901c, 505, 520				
	Preserve Summary and Contents	CONS	901c, 505, 520				

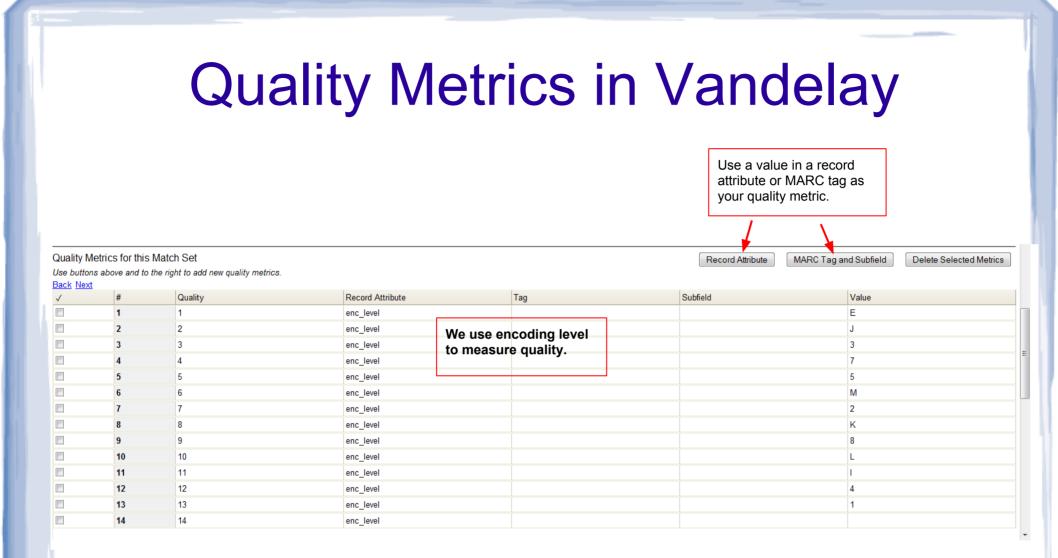


Server Settings 2 Bib Record: 5					
Go Back Reload Go Forward					
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Merge Profile	Preserve Summary and C				
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File to Upload:	Browse_ Upload				
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Quality Metrics in Vandelay

- Quality metrics provide a mechanism for Vandelay to measure the quality of records and to make importing decisions based on quality.
- Metrics are configured in the match set editor.







Adding a New Quality Metric

Quality Metrics for this Match Set

Record Attribute:	ELvl		•	
/alue:	K			Hgher-quality values should get a higher
Match Score	8			should get a higher match score
	Ok	Cancel		



More on Quality Metrics

- Quality Metrics are not required when creating a match set.
- If you don't plan to use them, the "minimum quality ratio" on the batch import screen should be set to 0.0.



Best/Single Match Minimum Quality Ratio

- Set to 0.0 if Vandelay should import a record regardless of record quality.
- Set to 1.0 if the incoming record must be of equal or higher quality than the existing record to be imported.
- Set to 1.1 if the incoming record must be of higher quality than the existing record to be imported.



Evergreen MARC File Upload

Record Type	Bibliographic Records 🔹		
Create a New Upload Queue	Apr_22_2012	or Add to an Existing Queue	•
Record Match Set	m300 Upload 2 🔹		
Holdings Import Profile	949 tag 💌		
Select a Record Source	oclc 💌		
Record Import Actions		_	
Merge Profile	m300 Upload 🔹		
Import Non-Matching Records	\checkmark		
Merge On Exact Match (901c)			
Merge On Single Match			
Merge On Best Match	\checkmark		
Best/Single Match Minimum Quality Ratio	1.1 New Record Quality / Qua	lity of Best Match	
Insufficient Quality Fall-Through Profile	•		
Import Non-Matching Records Merge On Exact Match (901c) Merge On Single Match Merge On Best Match Best/Single Match Minimum Quality Ratio	 ✓ ✓ ✓ 1.1 New Record Quality / Quality	lity of Best Match	

Insufficient Quality Fall-Through Profile

• Use this option if you want Vandelay to use one merge/overlay profile for high quality records and another for low quality records.

• Example:

High-quality records use the Full Overlay profile.
 Low-quality records use the Match-Only merge profile to load items.



Evergreen MARC File Upload

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Record Match Set	m300 Upload 2 🔹
Holdings Import Profile	949 tag 🔹
Select a Record Source	oclc
Record Import Actions	
Merge Profile	Full Overlay
Import Non-Matching Records	\checkmark
Merge On Exact Match (901c)	
Merge On Single Match	
Merge On Best Match	\checkmark
Best/Single Match Minimum Quality Ratio	1.1 New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	Match-Only Merge
File to Upload:	Browse_ Upload

Changes to Import Queue

- Failure messages for records that did not import.
- A new items import queue that also displays failure messages.
- Display of number of matches on main queue page.
- Ability to export to CSV, e-mail, or print the queue. Ability to export to bucket was also added at a later time.
- New option to limit queue to records that failed to load.



View of the Import Queue

	View MARC	Matches	Import Failures	Import Time	Title of work	Author of work	Language of work
	View MARC	Matches (3)	<u>ltems (1)</u>	8/10/11	Jupiter / by L.L. Owens.	Owens, L. L.	
•					,		,



Error Messages

Import Errors

ID	40				
Import Error	overlay.record.quality				
Error Detail					
<u>Title</u>	Why didn't you come for me? / Diane Janes.				
Author	Janes, Diane.				
ISBN	9781569479407				

Import Errors

<u>ID</u> 3534

Title The effect of response groups on the revision of student writing./ William D. Howe.

Author Howe, William D.

1	Barcode	Call Number	Owning Library	Import Error	Import Error Detail	Alert Message	Attribute Definition
	30594001377(MEd2000.H85	8	Import or Overlay failed	ACTOR_ORG : The requested actor_org_unit was not found		8
1							III



Works great for MARC record imports, but what about acquisitions?

- As we were working on the Vandelay project, we realized we needed similar functionality when loading order records via acquisitions.
- MassLNC contracted with Equinox again to bring Vandelay functionality to the acquisitions order record loader.



Order Record Loader

Upload

Create Purchase Order				
Activate Purchase Order				
Provider				
Context Org Unit		•		
Add to Selection List		•		
Upload to Queue		• C	Or create a new o	ueue
Record Match Set		•		
Merge Profile		•		
Import Non-Matching Records		F	Record Source	
Merge On Exact Match (901c)				
Merge On Single Match				
Merge On Best Match				
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality / C	uality	of Best Match	
Insufficient Quality Fall-Through Profile		•		
Load Items for Imported Records				

Questions?

