Lehigh University
Batch Import Processes

MARC Edit Task Name	For which records?	What does the task do?	What does the import profile do?	What is missing that we wish the system could do?
Acquisitions – File 1 – Step 1	All incoming MARC records for purchases. These can come from OCLC, YBP, WCP, or Midwest.	1) Deletes unwanted MARC fields 2) Adds a 980 field that contains order information.	Record is not imported until final acquisitions task is run.	We would like the system to be able to deal with scenarios such as added volumes, multiple volumes at once, multiple copies at once, added copies, or plain old single order copies, without having to run 2 or 3 MarcEdit tasks, and more importantly, not asking the staff to look at a chart and determine which "scenario" they are dealing with. We would like the system to know if a bib record exists already and an added volume is coming in, a new item needs to be attached to the existing holdings record. Or, if a copy 2 has come in and the purchase is represented in a
Acquisitions – File 1 – Step 2	This is a second task that needs to be run on the same MARC order file, in addition to the one above, if the item being acquired is a second copy for the library or a multi-volume set.	Adds an extra field on the 980 that asks the user to categorize what this is: A. A new multi-volume set B. Multiple copies of a new (not yet in the catalog) book. C. Volume or volumes to be added to a record that is already in the catalog D. A second copy or a replacement copy of a book that is already in the catalog.	Record is not imported until final acquisitions task is run.	
Acquisitions – File 2	This is the final task that the acquisition staff must run on all incoming records.	The coded letters are transformed into the needed fields required by our catalog to handle that particular situation in terms of holdings and items.	Uses the info in the 980 field to create a purchase order; creates an appropriate holdings/item record or item record on an existing holding, depending on what is in the MARC record as set up in the previous steps.	

				MARC bib, that the system needs to add a new holding and item onto the existing bib. ; The ability to automate or even somehow simplify the population of the Purchase Order would be helpful. Now the acquisitions staff member has to type in the Account Number, Object Code, Donors. This is variable though from book to book, not vendor to vendor. Sometimes the vendor can supply this if it is given to them at the point of order, sometimes not. Often our orders today come from Amazon. Our acquisitions staff will perform a quick search using MarcEdit OCLC extension and work with that record in that case.
Ebooks-Subscriptions (17 separate tasks named for the	Records from various vendors, as well as WorldShare Management (OCLC	1. Deletes MARC fields that are not needed ("junk tags")	The import profile will look for a match anywhere between 035 $a or 035 $z between the incoming record and cataloging record. If it	Sometimes the catalog does not catch a match between 035$a and 035$z, so I

source of the bib records)	records). The existence of a task for each vendor is not a response to the way the information arrives, but a way to "tag" a record with the source and rights that exist with the access to that title. That is based on the vendor, and particular package we have with that vendor.	2. Adds some constant data for local purposes (i.e. a 655 field that says Electronic books) 3. Adds RDA elements to the record as best as an automated process can. We value the 33x fields, so it handles that well and our eBook records are consistently represented format-wise. 4. Cleans the 856 field to our local specifications to add a Coral ID (Coral is our Open Source ERM), a quick look at the terms (i.e. single user, subscription, etc.) for our reference librarians. 5. Moves the OCLC number from the 001 to an 035$a	finds a match it will protect the 856 of the existing record, overlay the entire bib, except that protected 856, and create an eholding record for the new acquisition. If it does not find a match it will create a new bibliographic record and an eholding record.	always run a SQL query to look for matches previous to the import. I really shouldn't have to do this; also protecting the 856 field is a workaround – a substitute for the system's inability to merge records. This reminds me to mention that MarcEdit merges records very well, and while this is a much simpler task then would be for a library catalog, it may serve as some kind of example.
Ebooks - Purchases	Records that need to overlay brief records, or quick imports by acquisitions.	1. Deletes "junk" fields 2. Adds RDA elements 3. Creates a blank 001 field. The user has to fill in that 001 field to create a match point. 4. Creates the local standard 856 field. 5. Moves the OCLC number from the 001 to an 035$a	The import profile looks for a match. If there is no match, the record will be rejected. If there is a match, the record will overlay the existing bib. The eholding record will get populated appropriately and the PO will be retained.	Again, if the system could detect that match instead of us having to force a match point, that would be helpful.
Finding Aids from XML	Records that come from ArchivesSpace in MARCXML.	1. Adds RDA elements 2. Puts the MARC fields in order	The import profile simple creates a bib/holding/item record.	It would be great if the system ingested the XML file, instead

		3. Creates an 856 field appropriate to local standards.		of having to turn it into MARC first.