

Improve data consistency and expand data content through record repair, correction and replacement.

### Improve Your Data with Follett's Help and Expertise

While you know your data, we know Destiny and we're here to help you maximize the usefulness of your data in Library Manager. In order to do so, the Library Manager MARC Enhancement Service has been designed to:

- Improve relevancy and accuracy of search results.
- Increase access points so users find information quickly and easily.
- Streamline searching and information retrieval.

### Excellent Data Improves Information Access

The value of your library is found in your collection, while the value of your data is in assisting users to discover resources that fit their needs. You might ask yourself if your data has been influenced by:

- Different catalogers who have created and managed your MARC bibliographic records using contradictory cataloging policies?
- Manually created records which were quickly entered to circulate materials when new; however lack the full content necessary to efficiently and effectively locate materials over time?
- Evolving industry practices that have changed ideas about how materials are cataloged such as SEARS subject headings updates?

If so, your MARC bibliographic data might have become inconsistent and now limits the ability of your users to locate materials. Additionally, if you represent one library in a district, these issues could be compounded by the other libraries across your district.

If these influences have affected your data, then your data's value could be significantly increased through the Library Manager MARC Enhancement Service. Again, if you represent one library in a district, then the value added by the Enhancement Service across the district would be even greater.

### Library Manager MARC Enhancement Service

If you identify with the influences that could have affected your data and would like to address issues to increase your data's value, then the intent of the Library Manager MARC Enhancement Service aligns with your goals. However, before you make this important decision, you might have questions regarding the service.

The following section focuses on questions you might have regarding the service and the answers will provide detail to help you determine whether this service is right for your library or district as a whole.

If you find that the Enhancement Service does not address all of your data issues, the Destiny Custom Data Manipulation service would offer additional options.

## Questions & Answers

Details regarding the steps involved in enhancing your data are included in the answers to the following questions:

- Why would I want to purchase the Enhancement Service?
- What does the Enhancement Service do to my records?
- Could you provide more detail regarding what is done?
- Why is the LEADER set and how is it set accurately?
- What is the difference between strict record matching rules and expanded matching rules?
- What data elements are involved in strict rule record matching?
- What data elements are involved in expanded rules record matching?
- When a record match occurs, my record is replaced with the Alliance Plus record. Are there any parts of my record that do not get overwritten?
- What happens to the records that are not matched with an Alliance Plus record?
- If my data issues aren't addressed by the Enhancement Service, is there an alternative?

These questions and their answers comprise the remaining pages of this service summary.

### ***Question: Why would I want to purchase the Enhancement Service?***

When speaking of the importance of good data in locating materials, one of our customers said "If they don't know you have it and they can't find it, what good is it?"

By addressing data consistency, data content, and data quality the Enhancement Service makes it easier for your patrons to know you have the materials, to determine if the materials are relevant to their needs, and to locate the materials quickly.

By making records more consistent across multiple collections, Library Manager's ability to recognize duplicate records and merge them into a single shared record increases. This reduces the record maintenance efforts of your staff. It also lends to consistency for your students as they progress through their learning career, moving grade to grade, school to school, and out into the world prepared for a lifetime of learning.

### ***Question: What does the Enhancement Service do to my records?***

The Enhancement Service steps through your MARC records and does the following:

- Repairs MARC record structure.
- Corrects existing MARC tag formats.
- Creates required MARC tags.

- Replaces your MARC record with a matching Alliance Plus record.
- Updates existing SEARS subject headings.
- Adds your school name to at the end of all 59X tags.

Each of these steps is required in order to enhance your data. The goal of repairing the MARC record structure, correcting existing MARC tag formats and creating required MARC tags is to locate the same record in Alliance Plus.

**Note:** *If you are not familiar with Alliance Plus, it is our database of over nine million MARC records. Alliance Plus is continuously updated with new MARC records providing an excellent source of K12-specific data. It serves as the foundation of our Enhancement Service.*

When a match between your record and an Alliance Plus record occurs, the majority of your record content is replaced by the Alliance Plus record's content. This creates a hybrid record containing Alliance Plus data and your local tags.

- The Enhancement Service processes data using our strict record matching rules although using an expanded set of record matching rules can be requested. It is important to understand the implications of using either the strict or expanded record matching rules, so questions specific to this topic are included later in this service summary.
- To determine whether your local tags will survive this record replacement process, please refer to the question specific to this topic later in this service summary.

The additional data enhancements, such as updating your existing SEARS subject headings and adding your school name to the end of the 59X tags, are additional benefits of the service.

**Question: Could you provide more detail regarding what is done?**

In order to make an informed decision whether to purchase the Enhancement Service or not, you should consider the following summary of the actions taken. The Enhancement Service:

- Identifies MARC file format and record directory corruption.
  - Repairs and attempts to recover records impacted by file format corruption.
  - Performs general record structure cleanup.
    - Removes multiple end of tag markers, etc.
- Removes invalid characters from the beginning of the Title in 245\$a.
  - This prevents incorrectly entered characters from impacting the ability to find a match.
    - “[Grapes of Wrath” becomes “Grapes of Wrath”
- Creates a 008 tag when no 008 tag exists. The 008 tag provides coded information about the record as a whole and special bibliographic aspects of the material the record describes.
- Adds or updates the 005 tag. The 005 tag serves as a version identifier for the record.
- Sets the non-language material “Type of Record” values in the record’s LEADER using MARC21 encoding specifications.
  - This is accomplished through a manual review of values contained in call number prefixes and tag 245\$h.
  - Clearly recognized material type patterns are fed into computer utilities that process the records setting the material type based other these other indications in the record.

- Sorts the MARC tag order within the record.
- Repairs Title tags that contain a leading article at the end of the title.
  - This includes Main Entry, Added Entry, and Uniform Title tags.
- Enhances your MARC records by replacing matched records with record content from Alliance Plus. Using Alliance Plus as a master source for MARC records results in greater consistency and expanded record content. This is the same record resource included with Library Manager.
- Splits subjects containing obsolete subdivision formatting.
  - Markers consisting of “-“and “--“ are eliminated with the tag contents following the marker placed in \$x of the tag.
- Updates existing SEARS subject headings using the latest edition of valid SEARS headings.
- Updates form subdivisions in subjects as required. For example:
  - If your original record of “Little Women” included the following:
 

```
650 1_aFamily life_xFiction.^
650 1_aSisters_xFiction.^
651 1_aNew England_xFiction.^
```
  - Your updated record would be as follows:
 

```
650 1_aFamily life_vFiction.^
650 1_aSisters_vFiction.^
651 1_aNew England_vFiction.^
```
- Where no Physical Description (tag 300 \$a) exists, creates a default tag. (Example: [ ] p. )
- Adds school name to the end of all 59X tags.
  - These are local tags that will remain in a MARC record shared across all of the sites within Destiny Library Manager.
  - Adding the school name associates the tag with the original site the content came from.
  - A PDF report is provided to aid in reviewing these tags.

**Note:** The above activities do not appear in the order they are performed.

### **Question: Why is the LEADER set and how is it set accurately?**

The LEADER in a MARC record is essentially a directory and road map the computer uses to understand what it is looking at and how to find its way around a MARC record. The character positions consist of data elements containing numbers or encoded values that define how a computer sees the record. The information encompasses everything from how long the record is to the type of material reflected in the record. Position 6 of the leader reflects the Type of Record.

Library Manager uses the LEADER for many aspects of record handling and display. For example, the Type of Record can determine how records match during import, or can display the correct material icon to a patron on a search screen. For this reason, setting the LEADER is a standard part of preparing data for success during processing. Setting the leader improves the ability for records to accurately match, and aids patrons in quickly recognizing different materials in their searches.

The value for “type of record” in the leader can be globally set using a computer utility. A manual review of descriptive values located in other fields of the record reveals the major patterns. The patterns are then used to configure the utility to set the leader to the correct type of record for as many records as possible using a global

process. A manual, record by record setting of this value is not available.

In general, Follett Software Company uses values found in call numbers (852 tag), and the medium designator of the title (245\$h) to set the correct value in the LEADER.

Setting the LEADER is not done for the following materials:

• Fiction	• Story Collections	• Non-Fiction
• Periodicals	• Professional	• Reference
• Easy	• Magazines	• Biographies

**Question: What is the difference between strict record matching rules and expanded record matching rules?**

Record matching is a process that uses data elements from your MARC record to locate the same record within Alliance Plus. It is important for record matching to be lenient enough to allow matches to occur, but not be so lenient that records match incorrectly.

Record matching rules define a sequential progression of data elements that are compared and used in determining a match. The Enhancement Service's record matching consists of a set of strict record matching rules and an expanded set of additional record matching rules that can be included in processing to increase the potential for a match to occur.

Strict record matching rules are the default set of record matching criteria that is applied to all records as they are processed. These rules enable records to match with minimal risk of incorrect matches in typical MARC databases. The matching criteria has been refined and developed over many years of processing millions of MARC records. For most of these rules, the presence of an LCCN, ISBN, or ISSN is critical.

Some collections may be cataloged with information that can be used to make a match, but do not contain one of the elements needed for strict matches to occur. For example, the records may not contain LCCN, ISBN, or ISSN. For these cases, use of expanded record matching rules may be beneficial and can be requested.

Expanded record matching rules are a set of additional record matching criteria that can be added to the strict matching. As with strict matching, the expanded criteria are applied to all records in a collection. When the progression through the strict matching rules does not result in a match, a further attempt using the additional rules occurs. This increases the potential for a match to occur. It is important to understand the increased potential for a match also increases the risk of an incorrect match. To gain a further understanding of the matching criteria, see the summary of strict and expanded record matching criteria in the next questions.

**Question: What data elements are involved in strict rule record matching?**

During the process, a record comparison begins with the strictest matching criteria and advances through the steps until a match occurs. If the comparison advances through all steps with no match occurring, the record is left untouched. The process advances to the next record and the process repeats itself. When a match occurs, the record is enhanced.

The Enhancement Service uses seven progressive steps of record matching criteria to match your record with the same record in Alliance Plus. While the details of this process are proprietary information Follett Software Company does not publish, following is a summary of these steps:

During processing, a MARC record is read and progresses through the following comparisons, searching the Alliance Plus records until a match occurs:

- Level 1 – LCCN, Title, Language Code, and Media Type
- Level 2 – ISBN, Title, Language Code, and Media Type
- Level 3 – ISSN, Title, Language Code, and Media Type
- Level 4 – LCCN, Author, Language Code, and Media Type
- Level 5 – ISBN, Author, Language Code, and Media Type
- Level 6 – ISSN, Author, Language Code, and Media Type
- Level 7\* – Title, Author, Language Code, and Media Type

**Note:** \* = This level has some conditional restrictions placed on it to reduce the risk of an incorrect match

**Question: What data elements are involved in expanded rules record matching?**

Expanded record matching rules are additional record matching criteria added to the strict matching criteria in processing. When expanded record matching is requested the Enhancement Service processing advances through the strict matching rules as described in the strict rules description above. When all strict rules are attempted and no match occurs, the Enhancement Service continues processing through the following expanded record matching criteria.

- Level 8\* – Limited Title, Limited Author, Language Code, and Media Type
- Level 9\* – LCCN, Language Code, and Media type with no Main Entry in either the customer MARC record or the Alliance Plus record
- Level 10\* – ISBN, Language Code, and Media type with no Main Entry in either the customer MARC record or the Alliance Plus record
- Level 11\* – ISSN, Language Code, and Media type with no Main Entry in either the customer MARC record or the Alliance Plus record

**Note:** \* = This level has some conditional restrictions placed on it to reduce the risk of an incorrect match

**Question: When a record match occurs, my record is replaced with the Alliance Plus record. Are there any parts of my record that do not get overwritten?**

Yes. There are local tags that will not be overwritten during the record replacement process. These local tags are handled as described in the following:

Tag	Action Taken
040	Updates subfield d to reflect that Follett Software Company was the last modifying agency
521	Retained as a local tag. Any 521 from a Follett source will be overwritten in the record replacement process.
526	Retained as a local tag.
590-599	Retained as a local tag.
658	Retained as a local tag.
690-699	Retained as a local tag.
790-799	Retained as a local tag.
856	Retained as a local tag.
940	Reading level, interest level, and review source information is moved as described below, in accordance with the MARC21 specification: <ul style="list-style-type: none"> <li>o 521 0  \$aReading Level\$bFollett Library Resources</li> <li>o 521 2  \$aInterest Level\$bFollett Library Resources</li> </ul>

005	Gets updated with a new time stamp per MARC21 specifications. Updates \$d when it does not reflect Follett Software Company as the last modifying agency.
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**Question: *What happens to the records that are not matched with an Alliance Plus record?***

Nothing. Non-match records remain in the customer data file. Other processing steps included in the service may modify these records but they are not dropped from the data.

**Question: *If my data issues aren't addressed by the Enhancement Service, is there an alternative?***

Yes. If you find that the Enhancement Service does not address all of your data issues, the Destiny Custom Data Manipulation service would offer additional options.