

# Adventures with Vandelay

*Massachusetts Library  
Network Cooperative*

**Mass  
LNC**

The logo for MassLNC features the word "Mass" in a large, black, serif font above the word "LNC" in a larger, black, serif font. Behind the letters "LNC" are three horizontal arrows pointing to the right. The top arrow is gold, the middle arrow is blue, and the bottom arrow is yellow.

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



Art Vandelay, Importer/Exporter

*Massachusetts Library  
Network Cooperative*  
**MassLNC** →

# 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**



# Batch Import Screen

1 Server Settings +

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

Create a New Upload Queue  or Add to an Existing Queue

Record Match Set

Holdings Import Profile

Select a Record Source

### 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  New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

File to Upload:

# Batch Import Screen

1 Server Settings +

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

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File to Upload:

# 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

Go Back Reload Go Forward Debug Print Pa

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

### Vandelay Match Set Editor

Use Record Attributes to Match on Fixed Fields

Match on MARC Tag and Subfield

Add an "And" or "Or" to your Expression

Add new Record Attribute MARC Tag and Subfield Boolean Operator

Working Match Point  
Choose from among the three buttons above to add a new match point.

Your Expression

- AND
  - OR
    - 020 \$a | Match score 2
    - 022 \$a | Match score 1
    - 024 \$a | Match score 1

Delete Selected Node Enter Replace Mode

Save Changes To Expression

Quality Metrics for this Match Set  
Use buttons above and to the right to add new quality metrics.  
[Back](#) [Next](#)

Quality	Record Attribute	Tag	Subfield	Value
✓				

Record Attribute MARC Tag and Subfield Delete Selected Metrics

# Vandelay Record Match Set Editor

The screenshot shows the 'Vandelay Match Set Editor' interface. At the top, there are navigation buttons: 'Go Back', 'Reload', and 'Go Forward'. Below these are utility buttons: 'Export Records', 'Import Records', 'Inspect Queue', 'Record Display Attributes', 'Merge / Overlay Profiles', 'Record Match Sets', and 'Import Item Attributes'. The main title is 'Vandelay Match Set Editor'. Below the title, it shows 'Match set name: Kathys match set', 'Owning Library: Example Consortium', and 'Type: biblio'. The 'Your Expression' field contains the text: `((020 +a OR 022 +a OR 024 +a))`. Below the expression field are three buttons: 'Add new Record Attribute', 'MARC Tag and Subfield', and 'Boolean Operator'. The 'Working Match Point' section shows 'Tag: 035', 'Subfield: a', 'Match Score: 4', and 'Negate?' (unchecked). A red box highlights the 'Match Score' field. A callout box points to it with the text: 'Give more weight to fields of greater importance.' Below this is an 'Ok' button. A list of match points is shown: '• 035 a | Match score 4'. A second callout box points to this list with the text: 'Used for fields that do NOT match - can use in conjunction with negative match score.' The 'Your Expression' tree view shows a hierarchical structure: 'AND' containing an 'OR' node, which contains three nodes: '020 a | Match score 2', '022 a | Match score 1', and '024 a | Match score 1'. A red box highlights the 'Enter Replace Mode' button. A callout box points to it with the text: 'Dragged node will replace selected match point'. At the bottom, there are buttons for 'Delete Selected Node', 'Save Changes To Expression', 'Delete Selected Metrics', and 'MARC Tag and Subfield'. A 'Quality Metrics for this Match Set' section is at the bottom left, with a note: 'Use buttons above and to the right to add new quality metrics.' and links for 'Back' and 'Next'.

# 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?	<input checked="" type="checkbox"/>
Fixed Field	
Format	
Joiner	
MARC Subfields	
MARC Tag	001
Physical Characteristic	
Sorter?	<input type="checkbox"/>
Starting Position	
String Length	
XPath	
Cancel	Save

# Batch Import Screen

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

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### 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

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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** New Definition Delete Selected

Context Org Unit

[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	a	r		[@code="x" t					r	False	949 holdings field	r	1	[@code="x"]	p	n	z	r	l	s	949
p	j	[@code = "x" and text() = "circulating"	i	[@code = "b"][2]	g	t	d	k	[@code = "x" and text() = "holdable"]	False	Evergreen 852 export format	[@code = "x" and text() = "visible"]	1	[@code = "b"][1]	y	l	m	[@code = "x" and text() = "reference"]	c	z	852
i	a				t					False	Unicorn Import format -- 999		1	m	p				l	k	999

# Batch Import Screen

1 Server Settings

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: 949 holdings field

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:

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File to Upload:  Browse...   Upload

# 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

Go Back Reload Go Forward Debug Print Page

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

[Back](#) [Next](#)

New Merge Profile Delete Selected

✓	Name	Owner	Preserve Specification	Replace Specification	Add Specification	Remove Specification	Min. Quality Ratio
<input type="checkbox"/>	Default Merge	CONS		901c			
<input type="checkbox"/>	Default Overlay	CONS	901c				
<input type="checkbox"/>	New 856	CONS			856		
<input type="checkbox"/>	Preserve Summary and Contents	CONS	901c, 505, 520				

# Batch Import Screen

Server Settings **Bib Record: 5**

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: 949 holdings field

Select a Record Source: oclc

---

### Record Import Actions

Merge Profile: Preserve Summary and C

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:

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File to Upload:    Browse...   Upload

# 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.

# Quality Metrics in Vandelay

Use a value in a record attribute or MARC tag as your quality metric.

## Quality Metrics for this Match Set

Use buttons above and to the right to add new quality metrics.

[Back](#) [Next](#)

Record Attribute

MARC Tag and Subfield

Delete Selected Metrics

✓	#	Quality	Record Attribute	Tag	Subfield	Value
<input type="checkbox"/>	1	1	enc_level			E
<input type="checkbox"/>	2	2	enc_level			J
<input type="checkbox"/>	3	3	enc_level			3
<input type="checkbox"/>	4	4	enc_level			7
<input type="checkbox"/>	5	5	enc_level			5
<input type="checkbox"/>	6	6	enc_level			M
<input type="checkbox"/>	7	7	enc_level			2
<input type="checkbox"/>	8	8	enc_level			K
<input type="checkbox"/>	9	9	enc_level			8
<input type="checkbox"/>	10	10	enc_level			L
<input type="checkbox"/>	11	11	enc_level			I
<input type="checkbox"/>	12	12	enc_level			4
<input type="checkbox"/>	13	13	enc_level			1
<input type="checkbox"/>	14	14	enc_level			

We use encoding level to measure quality.



# Adding a New Quality Metric

Quality Metrics for this Match Set

Record Attribute:

Value:

Match Score:

Higher-quality values  
should get a higher  
match score

# 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.

# Batch Import Screen

## Evergreen MARC File Upload

Record Type	<input type="text" value="Bibliographic Records"/>	
Create a New Upload Queue	<input type="text" value="Apr_22_2012"/>	or Add to an Existing Queue <input type="text"/>
Record Match Set	<input type="text" value="m300 Upload 2"/>	
Holdings Import Profile	<input type="text" value="949 tag"/>	
Select a Record Source	<input type="text" value="oclc"/>	

## Record Import Actions

Merge Profile	<input type="text" value="m300 Upload"/>	
Import Non-Matching Records	<input checked="" type="checkbox"/>	
Merge On Exact Match (901c)	<input type="checkbox"/>	
Merge On Single Match	<input type="checkbox"/>	
Merge On Best Match	<input checked="" type="checkbox"/>	
Best/Single Match Minimum Quality Ratio	<input type="text" value="1.1"/>	New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	<input type="text"/>	

# 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.

# Batch Import Screen

## Evergreen MARC File Upload

Record Type	<input type="text" value="Bibliographic Records"/>	▼
Create a New Upload Queue	<input type="text" value="Apr_22_2012"/>	or Add to an Existing Queue <input type="text"/>
Record Match Set	<input type="text" value="m300 Upload 2"/>	▼
Holdings Import Profile	<input type="text" value="949 tag"/>	▼
Select a Record Source	<input type="text" value="oclc"/>	▼

## Record Import Actions

Merge Profile	<input type="text" value="Full Overlay"/>	▼
Import Non-Matching Records	<input checked="" type="checkbox"/>	
Merge On Exact Match (901c)	<input type="checkbox"/>	
Merge On Single Match	<input type="checkbox"/>	
Merge On Best Match	<input checked="" type="checkbox"/>	
Best/Single Match Minimum Quality Ratio	<input type="text" value="1.1"/>	New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	<input type="text" value="Match-Only Merge"/>	▼

File to 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

<input type="checkbox"/>	View MARC	Matches	Import Failures	Import Time	Title of work	Author of work	Language of work
<input type="checkbox"/>	<a href="#">View MARC</a>	<a href="#">Matches (3)</a>	<a href="#">Items (1)</a>	8/10/11	Jupiter / by L.L. Owens.	Owens, L. L.	



# Error Messages

## Import Errors

ID 40

Import Error overlay.record.quality

### Error Detail

Title Why didn't you come for me? / Diane Janes.

Author Janes, Diane.

ISBN 9781569479407

## Import Errors

ID 3534

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

Author Howe, William D.

	Barcode	Call Number	Owning Library	Import Error	Import Error Detail	Alert Message	Attribute Definition
<input type="checkbox"/>	305940013776	MEd2000.H8E		Import or Overlay failed	ACTOR_ORG : The requested actor_org_unit was not found		8



# 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  ▼

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Upload to Queue  ▼

Or create a new queue

Record Match Set  ▼

Merge Profile  ▼

Import Non-Matching Records

Record Source  ▼

Merge On Exact Match (901c)

Merge On Single Match

Merge On Best Match

Best/Single Match Minimum Quality Ratio  New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile  ▼

Load Items for Imported Records

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Questions?

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