



MARCIVE® INC.

RECLASSIFICATION PROFILE Part 2: Guide

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This guide is intended to help you answer the questions in Part 1 of the Reclassification Profile. The numbering corresponds to the numbers in the profile.

Please fill in the answers directly into the Part 1 form, print, sign, and return to your MARCIVE representative. You may mail, send a pdf, or fax the signed profile. Only Part 1: Customer Specifications, pages 1-7 are needed.

Please contact your representative for more information.

Customer authorization

This profile is used in place of a contract, so we need to have the signature of the person who is authorizing the work to be done. If you are not the person who is authorized to commit money for your institution, please have that person sign the first page of the profile.

You may have received an initial quote before we received your specifications and a later quote once we learned more about your project and the number of bibliographic records. This final quotation is the one that will be referenced in the profile.

We honor our prices up to 12 months from the date you sign this profile. If the project is expected to last longer than 12 months, we will supply a different number of months. It is a good idea to provide your data to us around the same time as the profile is completed, simply because profile options might change in the interim.

Once you have completed the profile, print Part 1 and have the appropriate person sign.

We also need the spelled out name, title, and institution of the person authorizing the work.

1. Customer addresses and means of shipment

1.1 Customer address

We use this information to enter your institution into our database, so it is important for it to be complete and accurate. We ask that it not be a Post Office box because we ship products using UPS. If there is an address that you use for UPS shipments, please include it here.

1.2 Billing address. Leave blank if same as above.

If invoices are to go to a different address, please enter that address here, and give us the name of the person to whose attention the invoice should go.

1.3 Contact name

Typically, the name of the person who is managing the project would go in the contact area.

Is there a way to contact you when the library is closed? For example, if you are a 9-month librarian who wants the project completed over the summer, we need a way to ask questions.



1. Customer addresses and means of shipment

1.4 Vendor address

If you would like us to ship the final MARC record file to your vendor for loading, we need all of the appropriate information.

1.5 Method of shipment

Charges for shipping physical products (spine label sets and so forth) will be added to your invoice. The default method is UPS Ground, as it is the least expensive but still provides tracking. Please let us know if you prefer to make other arrangements.

Use the free text area at “Other” if you wish to give us more detailed instructions about shipping.

2. Customer Information

2.1 Type of library. This helps us understand your library better. Examples:

- College, university, or community college
- Law library
- Special (corporate, historical)
- Armed forces library
- Medical library

2.2 Existing MARCIVE customer. We are always delighted when a customer of one service chooses us for another—and it happens a lot.

Do you receive cataloging from us currently (MARC records or catalog card images)? Or did you receive cataloging from us in the past? We already have an ID set up for you. Smart and generic barcode, spine label set, retrospective conversion, Brief Record Upgrade, authorities processing, and government documents customers all have ID codes. Any ID codes that your library has used for any project are of interest to us.

If you do not know the ID code but know that your library used our services, just put a checkmark by the appropriate service or services.

Relationship between profile and price quotation

Every reclassification project MARCIVE performs is unique. Our marketing representative prepared a custom quotation for your library based on our understanding of:

- Volume of work
- Source data
- Specifications
- Sample you provided us

Before we start the project, the number of titles may increase or decrease and the profile may reveal options you had not previously considered.

As you go through the profile and notice the words “**See quote,**” the item may be an extra cost item that we can add in—or our marketing representative may already have included it. If you have any questions about your quote or would like to add or remove products, please contact your marketing representative. We are happy to oblige!

3. Characteristics of library’s data

3.1 Source(s) of bib records to be used for reclass project. Typical answers: “Export from SirsiDynix Horizon.” “Export from Ex Libris Voyager.”

3.2 Control number. At the conclusion of the project, MARCIVE will return the library’s database containing the new call number. The library will reload the database and replace existing records. It is essential that you know the MARC tag of the control number that will be used to replace the existing database.



3. Characteristics of library's data

- 3.3 Number of bib records.** This is the total number of MARC bibliographic records the library is sending.
- 3.4 Project dates.** It is important for MARCIVE to know the library's expectations for the completion of the project. We will try to work with your plans. A number of factors affect our delivery, including the availability of label stock. If you have hired student assistants to begin relabeling the collection the first day of June, please let us know!
- 3.5 How will records be sent to MARCIVE?** Please export the data from your automated system in files of 50,000 records each and send via FTP.
- 3.6 Character coding scheme of MARC record output.** Exported records from an automated system can be in MARC-8 (standard MARC format) or UTF-8 (Unicode). It makes a difference. Please ask your ILS vendor if you are unsure.

4. Reclassification options

- 4.1 Classification (old to new).** Most libraries are moving from Dewey Decimal Classification to Library of Congress classification. However, if you want to move from Elazar to LC classification, Planetree to NLM classification, or even LC to Dewey, all that is important is that the old call number and the desired new call number exist in identifiable places in the MARC bib record you send us.
- 4.2 Has any portion of your database already been reclassified?** The default is that we do not need to look for records that have already been reclassified.
- However, it may be that you have already started using the new classification system. If you are sending the entire database, including the previously reclassified titles, MARCIVE can produce spine label sets, smart barcode labels, or perform other processing according to your specifications. If no processing is desired, it is better for the library not to send those records.
- 4.3 Reclassify all records.** The default is that MARCIVE will attempt to reclassify all records that the library sends.
- If the library cannot suppress export of records that should not be reclassified, please provide us with criteria for separating the records, which do need the processing. There may be a charge for identifying the subset.
- 4.4 Search records in Library of Congress database when library's record lacks an LC call number.** The default is not to perform this extra step. Do not answer 4.6.1.
- However, it may be that none of the library's bib records contains the new call number. It may be that some of the records have the new call number but many do not. In either case, an option is to have MARCIVE search the Library of Congress database to try to find an LC call number.
- If the library wants to have MARCIVE perform this extra step, the quote should include the extra charge. Please answer 4.4.1, which specifies what constitutes a match.
- 4.4.1 Criteria for a match.** You are choosing to have MARCIVE compare the library's database against the Library of Congress database to increase the number of records reclassified.
- We take the record you send us, create a key for LCCN, ISBN, ISSN, and Author/Title/Publisher/Date, and then search our database for the best possible match. If there are multiple matches, they are handled in accord with this profile.
- Rules for matching:**
1. LCCN + words from the title
 2. ISBN + words from the title
 3. ISSN + words from the title



4. Reclassification options

If more than one record matches, additional information is checked.

4. Title words + First word of the author's name + Publisher word(s) + Date of Publication (exact)

The default is to look for an exact match. This lowers the match rate, but you might be more satisfied with the results. Only the first example below would be a match.

An option is to look for an exact match, but accept as a match a record that varies as much as two years either way. Both of the examples below would be a match.

Example 1 (Both standard and looser criteria would match)

Your library's record

082 00 \$a 300 \$b S72
245 00 \$a Soviet studies in social sciences.
260 __ \$a New Delhi , \$b Concept \$c 1981.

LC record

010 \$a 81-905719
050 00 \$a H35 \$b .S724 1981
245 00 \$a Soviet studies in social sciences / \$c edited by Zafar Imam ; sponsored by the Indian Council of Social Science Research.
260 __ \$a New Delhi : \$b Concept, \$c 1981.

Example 2 (Only looser criteria would match)

Your library's record

082 00 \$a Fic
100 1_ \$a Montgomery, Lucy Maud.
245 10 \$a Anne of Green Gables / \$c by L.M. Montgomery.
260 __ \$a New York : \$b Grosset & Dunlap, \$c 1981.

LC record

010 \$a 83-047616
050 00 \$a PZ7.M768 \$b An 1983
100 1_ \$a Montgomery, L. M. \$q (Lucy Maud), \$d 1874-1942.
245 10 \$a Anne of Green Gables / \$c written by L.M. Montgomery ; illustrated by Jody Lee.
260 __ \$a New York : \$b Grosset & Dunlap, \$c [1983], c1935.

Example 3 (Only looser criteria would match)

Your library's record

082 00 \$a 823.8 W672p
100 1_ \$a Wilde, Oscar
245 10 \$a Picture of Dorian Gray
260 __ \$a New York : \$b Mondial, \$c 2008.

LC record

010 \$a 2012454521
050 00 \$a PR5819 \$b .A1 2010b
100 1_ \$a Wilde, Oscar, \$d 1854-1900.
245 14 \$a The picture of Dorian Gray / \$c Oscar Wilde ; with an essay by Jules Barbey d'Aurevilly.
264 _1 \$a New York : \$b Mondial, \$c [2010]

- 4.5 Special processing.** This is your opportunity to tell us any special requirements your library has. In some cases there may be an additional charge, but often not—so please let us know what you need.



5. Requirements of local system into which the records will be loaded

Local system

5.1. Name of company. Sometimes it is difficult to distinguish the name of the company from the name of the product they sell or support. In 5.2, a few companies and their systems have been listed.

5.2 System. Please give the name of the specific system into which the records will be loaded. This can be very helpful by allowing your library to benefit from our experience in loading records into the same type of system in the past.

Many companies have developed or acquired more than one system.

Examples:

Company	System
ByWater Solutions	Koha
EOS International	EOS.Web
Ex Libris	Voyager, Aleph
Innovative Interfaces, Inc.	Millennium, Sierra
Liblime, division of PTFS	Koha
SirsiDynix	Symphony, Horizon

5.2.1 Same system. Are you loading the upgraded data back into the same system from which you exported it to MARCIVE?

If the answer to 5.1 and 5.2 is the same as the answer to 3.1, answer yes.

5.3 Technical support person. We recommend that you consult with the vendor of your system when completing this profile. The name of the person with whom you are consulting is helpful.

5.4 E-mail address. The e-mail address of your vendor's technical support person.

5.5 Phone number. The phone number of your vendor's technical support person.

5.6 Will MARC records be going to library or vendor? The default is for the upgraded MARC records and all other products to go the library, using the address in 1.1.

If the records are going to the vendor, check the box and verify that the address is in 1.4.

For any other destination, please fill out "Other."

Local data requirements

5.7 Retain 001 in original record. If you are loading the records back into the same system as exported them, it is especially important to find out how, and if, the new record will replace the old record. It may be based on the presence of an identical MARC tag 001 in both old and new record. Our default is to retain the 001 as it came to us.

Other. If a different 001 is desired, please specify how we are to create and format the number.

5.8 Current local information. MARCIVE uses the library's local holding information in many ways and we need to know where to find the information in the current record.

Old call number: Used for sorting the labels in old call number, if you wish, to facilitate finding the book for relabeling. Used for printing of old call number on the bottom of the two interior labels to identify the book for relabeling. Included in the list of "Not Reclassed," for library follow-up. (This is the list of titles not reclassified in 7.20 of the RECP-cust profile.)

Location: Used for printing above the call number on new labels and sorting or separating labels by location.



5. Requirements of local system into which the records will be loaded

Copy and volume information: Used to determine how many items are associated with a title, and therefore how many labels need to be printed. Also used for printing following the call number if requested.

Please consider these functions when identifying the location of the current local information.

Important: You may need to consult your system vendor to obtain the correct information. We need to know how the item data will appear in records exported from your system. Below is an example of a holdings tag with the information we need, and how it should be documented on the profile:

949 \$a 423 Oxford \$b REF \$c 1 \$i 31121111552299 \$ v v.1

949 \$a 423 Oxford \$b REF \$c 1 \$i 31121111552303 \$ v v.2

Location: 949\$b

Current call number: 949\$a

Copy: 949\$c

Volume: 949\$v

5.9 New call number information. What MARC field(s) and subfield contain the new call number information? This is the place in which MARCIVE will find the new call number, when present. For example, MARC field 090 and 050.

5.10 Old call number after reclassification. The old call number may still be useful in the record for a while. Indicate in what MARC field and subfield to which you want MARCIVE to move it. Or, if you want us to remove it (from records that are reclassified), that is an option too.

5.11 Place new call number. Indicate in what MARC field and subfield into which you want MARCIVE to insert the new call number. It may be that you need the new call number to replace the old call number in the holdings tag.

5.12 Other requirements. Please specify where any additional data should appear. Feel free to send us additional requirements of the system in the mail or as an attachment to e-mail.

6. Value added services

6.1 Authorities processing. MARCIVE can upgrade the bibliographic records, with particular attention to the name and subject access points during reclassification. MARCIVE can also provide matching authorities records needed by many systems for cross references and better functioning of discovery products. If this service is desired, please complete an [Authorities Processing Profile](#) and obtain a quote from your marketing representative.

6. Value added services

6.2 Add Syndetic Solutions data to record. During your reclassification project, we can upgrade your database with information from our database of Table of Contents (TOC), Fiction and Biography, and Summary data.

TOC (MARC 505 or 970)

Fiction/Biography (you choose the MARC tag that will be indexed)

Summaries (MARC 520)

Author notes (you choose the MARC tag)

If you are interested in this option, your representative can run your records while they are still on our computer and give you a quotation. Your library can then make a decision based on the actual cost. We need a completed [MARC Record Enrichment Profile](#), because some of the MRES profile decisions affect the cost.

This is not a subscription. The data are actually inserted into your MARC record to help with retrieval, as well as relevance determination. You own the data.

6.3 Add reading notes. This enrichment is most useful for schools, public libraries, and consortia that include either or both.

During your reclassification project, we can upgrade your database further with Accelerated Reader, Lexile, and Reading Counts! Information. If you were not already provided with a quotation, please ask your marketing representative to provide an updated quote. The cost to add the data during a BRU project is a Reading Notes Profile Fee of \$26 but no per-record charge.

Accelerated Reader®. Reading Level, Interest Level, Point Value, and Quiz Number in MARC 526.

526 0_ \$a Accelerated Reader AR \$b UG \$c 5.3 \$d 22.0 \$z 82055.

Lexile. Lexile® Measure in MARC 521.

521 _8 \$a 880 \$b Lexile

Reading Counts. Reading Level, Interest Level, Point Value, and Quiz Number in MARC 526.

526 0 \$a Reading Counts RC \$b 6-8 \$c 5.1 \$d 6 \$z Quiz: 04201
\$z Guided reading level: R

7. Reclassification products

MARC bibliographic records

7.1 MARC bib records output to library.

All records together. The default is for MARCIVE to return all of the bibliographic records—both the ones that could be reclassified and those that could not—in a single file.

Two files. A second option is for MARCIVE to return all of the bibliographic records in two files. One file contains records that were reclassified. The second file contains records for which a new classification number could not be found.

Only reclassified. The third option is for MARCIVE to send the library only the records for which new classification numbers could be found. The records not reclassified are not returned.

No MARC records. Although it is an unlikely option, you may request that no MARC records be returned.

Regardless of which option is chosen, the library can obtain lists of records reclassified or not reclassified. See options 7.20r 7.21

7.2 Character coding scheme. The usual choice is MARC-8, standard MARC format, however some systems prefer UTF-8 (Unicode). Your system vendor can help you with this decision. Whatever you select for your bib records will need to be selected for authority records, if you elect to receive them.

7.3 Size of output files. Your records will be output in batches of up to 50,000 records. If your system has different requirements, please indicate the maximum file size so that we can discuss this with you.

7.4 Format. When your database is ready, we will send e-mails to the addresses listed in this section. The e-mail informs you that you have 14 days to pick up the files unless you let us know that you need a little longer. File Transfer Protocol (FTP) is the standard way to transfer files from our computer to yours over the Internet.

You can also request that the records be output to CD.

If you elect to receive a backup CD-ROM, let us know how many you need and we will provide a quote.

New spine label sets

7.5 New spine label sets. The default is for spine label sets to be printed for only those titles which MARCIVE has reclassified.

Alternatively, the library can elect to receive new spine label sets for everything. In this case, the location (e.g., Ref.) will appear on the top of the spine label, but the rest of the label will be blank. The two interior labels will have the location, author, title, and old call number, but no new call number.

If the library does not want spine label sets produced, mark the “do not print” option and skip to the next section.

7.5.1 Labels for already reclassified titles. The default is for MARCIVE to print new spine label sets for all reclassified items, whether the reclassification took place at the library or at MARCIVE.

Alternatively, spine labels for items previously reclassified can be suppressed.

7. Reclassification products

7.6 LC decimal. The default is for the decimal in the LC call number to print on the spine and interior labels. The option to include a decimal in the call number is not available if the decimal is lacking in the data. Ask your representative to examine your data to see if this option is available for your library. Alternatively, the decimal can be suppressed.

Use decimal on number

UG
626.2
.M36
S65

Omit decimal on number

UG
626.2
M36
S65

7.7 Line breaks. The default is for the LC class letters to appear on the first line and the class numbers on the second line. Alternatively, class letters and numbers can print on the same line.

Class letters on first line

Class number on second line

UG
626.2
.M36
S65

Class letters and numbers on same line

UG 626.2
.M36
S65

7.8 Font size.

The default is medium font starting on the left side of label.	12 pt.	UG 626.2
Small font starting on left.	10 pt.	UG 626.2
Small font centered left to right.	10 pt.	UG 262.2
Large font starting on left.	16 pt.	UG 626.2

16 point font is generally not recommended for Library of Congress classification because of the amount of data that needs to fit on the label.

7.9 Copy & volume information. Please indicate if you want the copy and volume information printed on the new label sets following the call number. For the first copy, we do not print c. 1.

7.10 Sort labels. The default is that labels are sorted first by location (such as Ref.), then by old call number. This facilitates finding the book to be relabeled.

Alternatively, labels can be sorted by location and new call number, or possibly other ways. Please let us know what works best for your library.

7.11 Spine label protectors. Spine label protectors can help new spine labels adhere to older books. If your library wishes to purchase protectors, they are sold in packages of 400.

Barcode labels

7.12 Smart barcode labels. Even if your existing barcode labels have the old call number printed on them, you may not want to have MARCIVE print new barcode labels. If you do want new barcode labels, however, we offer several options. MARCIVE can print smart barcode labels for all items, regardless of whether the item has been reclassified. You can request smart barcode labels just for reclassified items, regardless of whether MARCIVE classified it (7.11) or your library classified it (7.1.1).

7.12.1 Barcodes for already reclassified titles. If you answered yes to 4.2, please let us know if you need barcodes for items.

7.13 Barcode number. If the old record already has a barcode number and you wish to have physical labels created, let us know where to find the existing barcode number.



7. Reclassification products

If you do not have barcode numbers, and would like MARCIVE to create them, choose the second option, "Create barcode number." If so, please let us know the starting number.

7.14 Symbology. Barcode symbology defines how the bars and spaces are arranged to represent barcode numbers. MARCIVE supports both 3 of 9 (Code 39) and Codabar (mod 10).
If you use Codabar, please let us know the library code. MARCIVE does not assign library codes, but school districts often use them for identification, and we incorporate it into the barcode labels we create for you.

7.15 Check digit. Let us know if you want a check digit.

7.16 Number of barcode labels. Indicate whether you want one label per copy, or two.

7.17 Name to appear on label. There is a maximum of 40 characters, including spaces. In fact, choosing a shorter name makes the label look less crowded.

JOHN CALVIN UNIVERSITY STEWART LIBRARIES

7.18 Copy & volume information. The default is for us to print volume and copy information on the barcode label. For the first copy, we do not print c. 1.

7.19 Barcode label protectors. We offer clear polyester label protectors with pressure sensitive adhesive in units of 1,000 protectors per roll.

Reports

7.20 List of titles not reclassified. You may request a list of all of the titles not reclassified. This is a fairly useful report that can help you identify works that will require manual reclassification. It is not the default because it carries an additional charge.

It is in the MARCIVE one-line index format, sorted by old call number. If you wish to have a different sort (for example, control number or title), please ask.

7.21 List of all titles reclassified. Alternatively, you may request a list of all of the titles that were reclassified. It is in the MARCIVE one-line index format and can be sorted by old call number or another field. This report is rarely requested because the library has the labels showing which titles were reclassified.

8. Timing options

8.1 Output at conclusion of project. Most libraries want the records as soon as MARCIVE completes the project.

If your library is not ready to load the records immediately, MARCIVE will hold the records for up to three months at no additional charge. After that time, there is a charge for retrieving and outputting the records.

8.2 Output products after each batch. The assumption is that labels and records will be output at the conclusion of the project. There may be multiple files but it is all at the same time.

Some libraries need to send the files in batches, rather than all at once. If your library needs to have the resulting labels and records output after each batch is completed, there is a minimum charge. Please see the quote for the minimum charge.

9. Test approval

Please give serious attention to the test sample we provide. This is a great opportunity to see the results of the specifications chosen—and make sure they actually work in your system!

10. Examples

Ref	Ref American Association of Petroleum Geologists AAPG continuing education course note 622.1828 A537a
	Ref American Association of Petroleum Geologists AAPG continuing education course note 622.1828 A537a
TD 426 .N94 1985	TD Nyer, Evan K. 426 .N94 Groundwater treatment 1985 technology 628.162 N835g
	TD Nyer, Evan K. 426 .N94 Groundwater treatment 1985 technology 628.162 N835g
PR 878 .W6 R48 1993	PR Reynolds, Kimberley. 878 .W6 Victorian heroines R48 1993 820.9352042 R335v
	PR Reynolds, Kimberley. 878 .W6 Victorian heroines R48 1993 820.9352042 R335v
DK 274.3 1959 .K482 1960	DK Khrushchev, Nikita 274.3 Sergeevich 1959 .K482 The international 1960 situation and Soviet 947.327 K467i
	DK Khrushchev, Nikita 274.3 Sergeevich 1959 .K482 The international 1960 situation and Soviet 947.327 K467i

The location field contained a "Ref" location. The bibliographic record did not contain an LC call number and the library did not request we suppress spine labels if no new call number is available. See 7.5.

The old location does not print in front of the old call number on the two interior labels, but does print before the new call number.

The old call number, in this case Dewey, prints out all on one line at the bottom of the two interior labels. This is useful for identifying the item to be reclassified.

Labels are printed in old call number order to aid you in finding the book during the relabeling process. See 7.9.

Labels are sorted by location, then call number.

This library chose to include the decimal (7.6) and print class letters on the first line and class numbers on the second (7.7).

The library chooses the font size for the spine label (in this case, medium). The font for the interior labels is always 10 point.(See 7.8)

Copy and volume information can be printed on the spine label, depending on the font size.