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RETROSPECTIVE CONVERSION PROFILE

Part II: GUIDE

This guide is intended to help you answer the questions in Part I of the Retrospective Conversion [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 1-11 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 shall supply a different number of months. It is a good idea to provide your shelflist 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 and return your shelflist 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. Customer addresses and means of shipment

1.3 Contact Names

Typically, 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 school librarian who wants the project completed over the summer, we need a way to ask questions.

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 (CD, barcode labels, reports, 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.

Your shelflist will be returned to you via UPS Ground.

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

Important: Before you ship your shelflist to us, please make sure you are using a current copy of the [Shelflist Shipping Instructions and Information](#).

The current version is on our website in pdf format at www.marcive.com. From the left side of the screen, choose Retrospective Conversion; From shelflist. On the right side of the screen, see Literature & Forms. Click on Shelflist Shipping Instructions.

Alternatively, your marketing representative can e-mail it to you as a pdf attachment, or fax or mail one to you.

How you bundle and label your shelflist affects the quality of the final product. If you leave the preparation of your shelflist to us, we may need to charge a *shelflist organization fee* and the output, particularly the order in which you receive the barcode labels, may not be what you expected. We want the final output to save you time. Thanks for understanding!

Relationship between profile and price quotation

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

- Volume of work
- Source documents (paper shelflist, photocopies, printouts)
- Specifications
- Sample you provided us

Before we start the project, the number of titles may increase or decrease and the profile may

Relationship between profile and price quotation

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!

2. Customer Information

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

- College, university, or community college
- Law library
- School (K-12)
- Special (corporate, historical)
- Armed forces library
- Medical library
- Public library

2.2 Number of titles. The total size of the project.

2.2.1 Shelflist cards. In a library that used a paper card catalog for the public with access by title, author, subject, and series, it was customary to have a catalog for the librarian called a shelflist catalog. It was usually not accessible to the public. It included a single card or card set for each bibliographic entity in the library, arranged by call number, essentially a list of the books as they would appear on the shelves of the library. Unlike the public catalog, it included a list of the copies held by the library, and often acquisitions information such as “Gift” or “Baker & Taylor”. When a copy was lost or discarded, that information was noted on the shelflist card.

The information on a shelflist card is ideal for a retrospective conversion, as there is a one-for-one relationship with the bibliographic entities (commonly referred to as “titles”). A MARC record is created for each “title”.

There is also a list of the copies and volumes associated with that title. This information, variously referred to as item information or holdings, is used in an Integrated Library System (ILS) for many purposes including circulation.

Sometimes we use the word “shelflist” to mean any source document you can send us, however in this question we mean shelflist in the more particular meaning explained above. Question 2.2.1 is asking how many paper shelflist cards (not including continuation cards in a shelflist card set) you will be sending MARCIVE.

If you will be sending other source documents such as photocopies of title pages and versos, please restrict this question to your physical cards. You will be asked later for a count of title page/versos.

2.2.2 Photocopies of shelflist cards. We are looking for the number of titles, not photocopied pages.

This question is limited to libraries sending photocopies of cards. If none, put 0 (zero).

2.2.3 Computer printouts. We are looking for the number of titles, not the number of sheets of paper.

This question is specifically asking about printouts. If none, put 0 (zero).

2. Customer Information

2.2.4 Title page/verso photocopies. We are looking for the number of titles, not photocopied pages. Often there will be one copy of the title page and one of the verso, stapled together; this counts as one.

This question is specifically asking about title/verso photocopies. If none, put 0 (zero).

2.3 Project dates.

Date you will make the shelflist available to us. It is not necessary to fill this in now, but be sure to contact us when you are about to ship the shelflist. At that time we **want** to know so can check for them.

Expected completion date. It is not necessary to fill this in. Using the time line provided on the quotation we sent, you can estimate the completion date. If you have special considerations, such as scheduled training, please let us know.

2.4 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 catalog cards from us in the past? We already have an ID set up for you. If you know what it is, please fill in the ID code here.

Smart and generic barcode, reclassification, and other spine label set customers will have an ID code.

Previous retrospective conversion projects, either keyed retro or Brief Record Upgrade (BRU). If the project was for your library, include the ID code here. If it was for another school library or agency, please tell your representative but do not include that ID here.

MARCIVE authorities processing project. If you performed authorities processing with us in the past and are keeping it up-to-date with Notification Service, good for you! Please let us know the particulars of how you want the results of that project merged or not merged with this one.

Government document customers will have one or more ID codes; please include all.

Other. Any ID codes that your library has used for any project are of interest to us.

3. Conversion options

3.1 Method.

100% Solution. We search our database for a bibliographic record to use. If one is not found, our expert keying staff creates one from your shelflist or computer printout information.

Titles or numbers keying. We search our database by title or search access numbers (whichever is available) for a bibliographic record to use. If one is not found, no record is created. This is the only option available to libraries sending title page/verso photocopies.

3. Conversion options

3.2 Matching rules.

A match is based on title and main entry, and to a lesser extent on publisher, date, and Library of Congress Control Number (LCCN). Records with a date variation of plus or minus two years will be considered a match. Publishers are not always used for an acceptable match as publishers are subject to mergers and name changes. LCCNs and ISBNs printed on cards do not always match the title edition, publisher, or date that is on the card.

MARCIVE does not modify the authoritative records in our database, so if minor variations are acceptable, the record will be added to the library's database.

Exact match is not required. Our default results in the highest hit rate and the lowest cost.

Exact match is required. This choice results in a lower hit rate. If we did not know that the library required exact match when we performed the original sample evaluation, a new sample will be run and a new quote provided.

3.3 Matching from limited information.

Your shelflist card or computer printout may not have all of the information needed to make a good match. Our database may have several possibilities, which cannot be resolved from the information you have provided.

Standard rules. To provide your library with the most complete record possible including subject headings and other access points, we have developed the following rules.

For titles with limited information on the shelflist, select records based on this hierarchy:

1. If an LCCN or ISBN is present, accept the record that matches this number.
2. If there is an acquisition date, accept a record published before this date, regardless of the publisher.
3. If the card does not contain an acquisition date, accept the most recent record in the database that matches the information on the shelflist.

Create an original record. For titles with limited information on the shelflist and multiple matches to that information available in the MARCIVE database, do not choose any existing record. If you chose Exact match is required in 3.2, this is default.

If you have chosen the 100% Solution in 3.1 Method, you will receive a record with only the information on the shelflist.

3.4 Databases to be searched.

The **Standard MARCIVE Database** consists of records we have loaded from the Library of Congress, National Library of Medicine, Library and Archives Canada, Government Printing Office, and our Supplemental Database (records keyed by MARCIVE staff from LC and other libraries).

A/V Access. Adding this source of very good quality audiovisual cataloging to your project is recommended for the highest quality results. Look at the quotation you received to see if A/V Access records were quoted.

3. Conversion options

3.5 Subject headings.

The choice of **Library of Congress Subject Headings** is the default. Regardless of whether your call numbers are LC or Dewey, LC subject headings are recommended. This is especially true if the records are to be loaded into a multitype consortium catalog.

Sears Subject Headings. If you want Sears headings in your records, we can convert LCSH to Sears.

National Library of Medicine (MeSH). MeSH is available for topical headings to medical libraries. LC will be used for other access points.

3.6 Skipping cards.

Unless you choose otherwise, MARCIVE will provide a record for each title in your shelflist. This means if all copies of a title are indicated to be “withdrawn” or “missing”, you will still receive a title, with one copy indicated. If your shelflist contains cards for which all items are marked as missing or withdrawn and you want these cards skipped, we can accommodate your request. Look at your quote to make sure the cost of this option is included.

Convert all titles in the shelflist. This is the default.

Do not convert titles for which all copies are marked missing or discarded. See quote.

Chilton’s auto repair manual.
c. 1 Lost 5/2008
c. 2 Lost 4/2009
c. 3 Withdrawn (damage) 4/2011

Do not convert all titles. Skip titles based on the criteria you included in the profile. For example, skip OCLC cards, skip MARCIVE cards. See quote.

4. Creation of local fields

Location

Location code. At MARCIVE, a location is a collection within a single physical library. A location code is the sometimes shortened version of that collection name for use in the online catalog.

In the following example, the library puts the call number in the call number field, therefore Fiction, which you might consider a collection, is designated in the call number area rather than the location code.

<u>COLLECTION</u>	<u>LOCATION CODE</u>	<u>CALL NUMBER</u>
Adult Non-fiction	[No location code]	Call number
Adult Fiction	[No location code]	FIC, Cutter
Adult Fiction Audio Book	AUDIO	FIC, Cutter
Adult Biography	[No location code]	BIO, Cutter
Large Print	LARGE PRINT	Call number
Juvenile Non-fiction	J	Call number

4. Creation of local fields

Juvenile Fiction	J	FIC, Cutter
Juvenile Fiction Audio Book	J AUDIO	FIC, Cutter
Juvenile Biography	J	BIO, Cutter
Story Collection	[No location code]	SC, Cutter
Reference Collection	REF	Call number
Texana Collection	TEXANA	Call number
Spanish Language Collection	ESPANOL	Call number

For a multi-branch public library, we look at the shelflist to determine how to set up the location codes. A shelflist specific to each branch will be keyed as a multiple distinct projects, and can later be merged if needed. A shelflist that includes all branch holdings will be keyed as a multi-location project, as identified in 4.2.

- 4.1 Location code.** MARCIVE can key your location codes as they appear on the shelflist card, or we can standardize them.

Please see the sample completed Keying Standardizations chart at the end of this guide.

- 4.2 One card, multiple locations.** Some cards to be converted represent copies in two or more locations for example, both "Ref." and "Stacks" on the same card. Check Yes, if your shelflist contains these types of cards.

Call number

A call number is the "address" of a particular book in the library, so that you can go from the catalog to the shelf and find the book. (In this definition, you can substitute the word "book" with any library material, such as audiobooks, maps, CDs.) In most libraries, the call number is printed onto a label and attached to the spine of the book, so that it can be shelved and retrieved easily.

A Dewey, LC, or NLM call number is composed of two or three parts:

- **Classification.** The letters and/or numbers at the beginning of a call number may indicate a subject area (Dewey example, 423; LC example, PE 3825) or a genre (Fiction).
- **Cutter or book number.** The letters and/or numbers representing a name or word associated with the book. (OXF, Oxford, O96)
- **Additional information.** Sometimes a date or other information is included as part of the call number.

Superintendent of Documents (SuDocs) call numbers do not follow this scheme, as they are organized by governmental agency.

4. Creation of local fields

Examples of information on various kinds of call number labels:

Dewey	Dewey, with location on top	Library of Congress	National Library of Medicine	SuDocs
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FIC VER	REF 423 Oxford	PE 2835 .0918 2011	QU 13 098 2000	Y4 .G 74/9: S.HRG 106-801
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4.3 Dewey call number. Call numbers Dewey Decimal Classification

As you go through your shelflist, you will probably find variations in call numbers that you had not noticed before. Cataloging performed by different staff or received from vendors may have subtle variations that you want to eliminate.

Follow the *Instructions for Shipping Shelflists* to create bundles and develop a *Keying Standardization Chart*. A sample chart can be found at the end of this guide.

4.3.1 Standardize cutter. You may wish to have us key the cutter exactly as it appears on the card, the first option. If so, you should not answer 4.3.2., 4.3.3, or 4.3.4.

However, there are a number of ways you can standardize the cutter, the letters that follow the classification. You do not have to mark these on each card. In fact, the default is that we shall follow your standardization requests, at no additional charge.

4.3.2 Number of cutter letters after class. Please enter a number between 1 and 9 to indicate how many letters of the main entry (usually author) should appear in the call number. For example, if you indicate 3, the result will be as follows, for the author Abraham Verghese.

<u>Card</u>	<u>Keyed</u>
FIC Verghese	FIC Ver
FIC VERGHESE	FIC Ver
FIC V	FIC Ver
FIC VER	FIC Ver
FIC	FIC Ver
FIC V47	FIC Ver

4. Creation of local fields

4.3.3 Capitalization. You can choose to have us standardize the capitalization of the cutter.

<u>Card</u>	<u>Keyed</u>
FIC Ver	FIC VER
FIC VER	FIC VER

4.3.4 Standardize keying of common names. Several common situations arise when creating letter cutters from names. We have listed several examples. The left column shows what we shall key unless you choose an alternative.

For example, the default keying of O'Connor is OCO. If you choose the alternative, O'C, we shall use that pattern for all other names with apostrophes (O'Malley would be keyed as O'M instead of OMA).

4.4 LC or NLM number. We shall key the Library of Congress, National Library of Medicine, and any other classification scheme as it appears on your card.

4.5 Other. We can create a call number from the information that appears in the MARC record. If you choose this option, we shall send you additional profiling questions. NOTE: if the record does not have a Dewey or LC classification number, none will be created.

Extra keying. See quote.

4.6 Price of book. Price will be keyed in the format, NN.NN. The highest book price on a card will be taken for all copies.

4.7 Barcode. If your library has already barcoded its collection and the barcode appears on the shelflist card or computer printout, we can key the barcode into your record.

If your library has not already barcoded the collection to be converted, the easiest approach is for us to create a barcode number automatically. You can have these barcode numbers printed to labels. See section 7 for barcode label options.

4.8 Copy and volume information. The keying of copy and volume information is required if you want labels to be produced.

4.8.1 Copy numbering. You have two options for the keying copy numbers.

Harry Potter and the deathly hollows.

- c. 1
- c. 2 Lost
- c. 3 Lost
- c. 4
- c. 5

You can choose to have us key the copies as they appear on the card: c. 1, c. 4, c. 5

You can choose to have us key the copies as sequential: c. 1, c. 2, c. 3

4. Creation of local fields

- 4.9 Source (gift, jobber).** You can have us key information such as “Gift Friends 5/1/1969” or “B&T 8/11/2010”.
- 4.10 Other.** Please let your marketing representative know if there is other local information to be transcribed from your shelflist card.

5. Requirements of local system

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
Book Systems	Atrium
ByWater Solutions	Koha
SirsiDynix	EOS.web
Ex Libris	Voyager, Aleph
Follett	Destiny, Winnebago
Innovative Interfaces, Inc.	Millennium, Sierra
Liblime, division of PTFS	Koha
Mandarin	M3
SirsiDynix	Polaris
SirsiDynix	Symphony, Horizon

- 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. Requirements of local system

Local data requirements

5.6 Record control number. All records output will contain a control number. It is often used by your local system in loading records.

Source of data	MARC tag 001 will contain	Example
Library of Congress	LCCN	2010467140
Library & Archives Canada (formerly NLC)	LAC control number	20109040422
National Library of Medicine	NLM Record Number	2010052708
Government Printing Office	OCLC number	ocn726749069
MARCIVE Supplemental	MARCIVE number	sup00340167
A/V Access	PMSC number	be2010000657

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

5.7 Holding code. Unless requested, MARCIVE will not create a holdings field.

The library may request an 049 field with the library's MARCIVE ID code.

Alternatively, we can create a holding code to your specifications.

As you fill out the following questions, here are a couple of typical local data fields to give you an idea of what we need. Look in your system documentation for specifications.

Important: You must obtain the correct information from your system vendor. Otherwise, the records will not load correctly, your implementation will be delayed, and additional cost may be incurred.

852 \$a \$h 423 Oxford \$k REF \$p 300013524635

949 \$a FIC PICOULT \$i 0111961432130 \$l FIC ENG \$z ADULT

5.8 Placement of call number. Your call number will be created according to the specifications in section 4 of this profile and placed in a MARC field 852 subfield \$h with blanks between segments.

If your local system has different requirements, please specify the MARC field and subfield into which your local call number should be placed and how segments are to be separated.

5. Requirements of local system

- 5.9 Placement of location code.** Your call number prefix (e.g., REF) will be placed in a MARC field 852 subfield \$k.

If your local system has different requirements, please specify the MARC field and subfield into which your location code should be placed.

- 5.10 Placement of barcode number.** The default is for no barcode number or accession number to be supplied by or generated for the library, and is not required for the MARC record.

If you do need a barcode number, please specify the MARC field and subfield into which your barcode number should be placed.

- 5.11 Placement of local book price.**

If you are expecting a book price, please specify the MARC field and subfield into which the book price should be placed.

- 5.12 Placement of local copy information.**

If you are expecting copy information, please specify the MARC field and subfield into which it should be placed.

- 5.13 Placement of local volume information.**

If you are expecting volume information, please specify the MARC field and subfield into which it should be placed.

- 5.14 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

Authorities processing

- 6.1 Authorities processing.** A huge bonus feature of MARCIVE retrospective conversion is that we examine and upgrade where possible every obsolete name and subject heading. It would seem irregular to automate—and have obsolete access points.

We give Princess Diana a death date. We change Man to Human beings.

For medical libraries, we change obsolete MeSH terms to the current terminology.

For libraries that prefer Sears, we can do that too.

Indicate which subject classification you prefer, or ask that no authorities processing be performed. It does not change the cost.

6. Value added services

Authorities processing

6.2 Authorities processing options. RDA Conversion can be performed at the same time as authorities processing. You can choose the options that are desired in the [Authorities Processing Profile](#).

If desired, MeSH access points can be removed. We do caution against removal of access points, as a library may need them some day! Only select this if automatic MeSH authority control was not selection in 6.1 of the profile.

6.3 Matching authorities records. Most current systems use authorities records in some way but since this is an extra cost item, we do not output authorities automatically. We discuss the options for the system that you have and provide a quote.

6.4 Distribution of authority records. If you have requested authority records, please specify how the records should be output.

The default is to have one file of authority records returned to you. Matching authority records may be supplied all together in a single file regardless of the bib headings matched, or they may be divided into multiple files corresponding to the configuration of bib heading indexes in your local library automation system. Please consult with your local system vendor to determine how matching authority records should be divided for most convenient loading into your local system. Note that NLM (MeSH) authority records are always supplied in a separate file. They consist of individual descriptor and qualifier records as well as "descriptor-qualifier" combination records.

All types: Subjects, genre, names, and titles together.

All: 100, 110, 111, 130, 240, 400, 410, 411, 440, 600, 610, 611, 630, 650, 651, 655, 700, 710, 711, 730, 800, 810, 811, 830, and 840.
[MeSH: 6XX second indicator of 2.]

Subjects and genre together; names and titles together:

Subjects and genre: 600, 610, 611, 630, 650, 651, and 655.
MeSH 6XX second indicator of 2.
Names and titles: 100, 110, 111, 130, 240, 400, 410, 411, 440, 700, 710, 711, 730, 800, 810, 811, 830, and 840.

Subjects, names, and titles together; genre separate:

Subjects, names, and titles:
600, 610, 611, 630, 650, 651, 100, 110, 111, 700, 710, 711, 130, 240, 400, 410, 411, 440, 730, 800, 810, 811, 830, and 840.
MeSH: 6XX second indicator of 2.
Genre: 655 (GSAFD or LCGFT). MeSH genre records are supplied with all other MeSH authority records.

6. Value added services

Authorities processing

Subjects, and genre together; names separate; titles separate:

Subjects, genre	600, 610, 611, 630, 650, 651, and 655.
MeSH:	6XX second indicator of 2.
Names:	100, 110, 111, 700, 710, and 711.
Titles:	130, 240, 400, 410, 411, 440, 730, 800, 810, 811, 830, and 840.

Subjects separate; genre separate; names and titles together:

Subjects:	600, 610, 611, 630, 650, and 651.
MeSH:	6XX second indicator of 2.
Genre:	655.
Names and titles:	100, 110, 111, 700, 710, 711, 130, 240, 400, 410, 411, 440, 730, 800, 810, 811, 830, and 840

All types (subjects, genre, names, and titles) separate:

Subjects:	600, 610, 611, 630, 650, and 651.
Genre:	655
MeSH:	6XX second indicator of 2.
Names:	100, 110, 111, 700, 710, and 711.
Titles:	130, 240, 400, 410, 411, 440, 730, 800, 810, 811, 830, and 840.

6.5 Electronic authority reports. We do not recommend that you spend the extra money for reports if you are not going to have time to use them. The reports available:

Authority Control Statistics. This is a free report that provides the statistics for the processing, broken down by MARC tag.

Authority Control Unrecognized Main Access Points. Report showing all main access points, which did not appear in any form on the supplementary or master LC authority control files.

Sometimes referred to as a “No-Match”, “Not Found” or “terms Left Unchanged” report. Arranged first by MARC field, then alphabetically by access point within that field. The MeSH report is created separately.

Authority Control Multi-matches. Report showing the main terms, which matched multiple authorized terms forms in the supplementary or the master authority files, along with all possible choices for the authorized form. Space on this report is limited and some terms are truncated. Sometimes referred to as the “Multiple Authorized Forms” report.

Authority Control Access Point Changes. Reports showing every field (before and after) that was changed by matching to an associated authority record. The report is further divided by types of changes made. The access points that are changed will be separated by tag type [X00, X100, X100, 650, 651, and 655) to enable easier reviewing. Other sections within this report include:

- Changes to Tags/indicators/Subfield Codes
- Generated Genre (655s generated from 650 fields or 600 \$v Biography)
- Split Subjects

6. Value added services

6.6 Authorities processing after the retrospective conversion project

Notification Service with NewMatch Service. The best way to keep your authority file up to date is with MARCIVE's Notification Service. You will receive notification of pertinent revisions and deletions to your authority file. You can also elect to have MARCIVE continue to look for any headings which were not matched during retrospective conversion, using our NewMatch Service. If we receive an authority record from Library of Congress that matches your previously unmatched heading, we provide it to you. Notification Service customers can receive this service automatically and at no additional charge. If you wish to have this service but do not sign up for Notification Service the cost is \$300 per year. In either case, you must notify us before we process your backfile that you wish to have us turn the NewMatch feature on so that we save your unmatched headings.

New bibliographic records: Overnight Authorities Service. The best way to keep your bibliographic file consistent and up-to-date is to send your new cataloging, as well as cataloging for large sets, through Overnight Authorities Service.

Please submit an [Authorities Processing Profile](#) if you would like either or both of these services.

MARC record enrichment

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

During your retrospective conversion project, we can upgrade your database further with Accelerated Reader and Lexile 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 an authority 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

6.9 Add reading notes report You can get an electronic list of the titles to which we have added Accelerated Reader or Lexile data for a one-time cost of \$35.

7. Retrospective conversion products

MARC bibliographic records

7.1 MARC bib records. Full MARC bibliographic records are the primary reason to perform a retro.

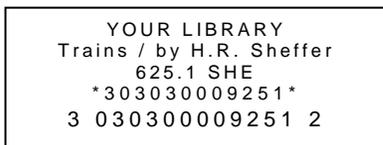
7. Retrospective conversion products

- 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 coding 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 shall 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.

Barcode labels

- 7.5 Smart barcode labels.** Smart barcode labels are used by some circulation to save time in implementation. We assign a barcode number to the title, copy, and other holdings information as part of the conversion process. We create barcode labels with enough information for you to identify the book and attach the label. When you load the MARC records into your local system, item records are built automatically, saving your staff the work of converting items one-by-one.



Example of smart barcode label

- 7.6 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.
- 7.7 Number of barcode labels.** Indicate whether you want one label per copy, or two.
- 7.8 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.
SAISD THOS JEFFERSON HIGH SCHOOL LIBRARY
- 7.9 Beginning barcode number.** Indicate the first number we should use for your barcode labels. We shall increment the numbers from there.
- 7.10 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.

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7.11 Generic barcode labels. Generic or “dumb” barcode labels have a number that is not associated with anything until it is manually linked to an item record in your system. It is handy to have some for pieces that did not go through the conversion process or are newly added to your collection.

Choose a beginning number that does not conflict with labels you already have used or have on order. Indicate the number of labels desired. See quote.

7.12 Patron barcode labels. Patron labels have a number that is not associated with a patron until it is manually linked to a patron record in your system.

Choose a beginning number that does not conflict with labels you already have used or have on order. Indicate the number of labels desired. See quote.

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

Spine label sets

7.14 Spine label set. The default is for us not to provide spine label sets. Indicate if you would like them to be generated and complete the rest of this section.

Each pressure-sensitive label set:

- one vertical spine label printed with the call number, and
- two horizontal pocket/book card labels printed with the call number, author, and title.

Samples are available.

7.15 Number of sets. If you choose spine label sets, the default is for one label set per copy. Alternatively, you can indicate multiple copies.

7.16 Spine label font. There are four choices for the font and arrangement of the spine label:

Medium size font, starting on the left side of the label. 12 point. This is the default.

Small font, starting on left. 10 point.

Small font, centered left to right. 10 point.

Large font, starting on left. 16 point.

7.17 Information on labels. We print the location about the call number and the copy and volume below the call number. C. 1 is not printed. On the interior pocket/book card labels, the author appears above the title.

You can omit the barcode number. If you choose to have it printed, it will appear on the interior labels. The number of characters that can appear on the interior labels is 14 characters.

7. Retrospective conversion products

Reports

- 7.18 Verification list, electronic.** You may optionally request a list of all of the titles converted. It is in the MARCIVE one-line index format. The list will be output in input order.
- 7.19 Authorities reports, electronic.** Your choices are described in 6.5.
- 7.20 Reading note report.** This report is described in 6.9.

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 after each batch.** The assumption is that 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 shelflist cards in batches, rather than all at once. If your library needs to have the resulting 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!

**KEYING STANDARDIZATIONS CHART FOR
LIBRARY NAME: _____**

Collection	Cards read	Key location code	Key call number
Adult Biography	B, Bio, BIO, 92; 5 letters		BIO, First 5 letters of biographee's surname
Junior Biography	J BIO; 5 letters	J	BIO, First 5 letters of biographee's surname
Adult Fiction	F or FIC; 1-3 letters		FIC, 3 letters
Junior Fiction	JUV FIC or J FIC; 1-3 letters	J	FIC, 3 letters
Easy	PIC, E or EASY; 1-3 letters	E	3 letters
Story Collection	SC or STORY, 1-3 letters	STORY	3 letters
Reference	REF or Reference, Dewey #, 1-3 letters	REF	Dewey #, 3 letters
Nonfiction	Dewey #, 1-3 letters		Dewey #, 3 letters
Audio	Audio	AUDIO	Key as is
Genealogy	Dewey #, 1-3 letters	GEN	Dewey #, 3 letters