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Brief Record Profile ***Part 1: Specifications***

Thank you for choosing MARCIVE's Brief Record Upgrade Service. Our profile is divided into two parts. Part I is your opportunity to tell us what processing you want. Part II of this profile is a Guide that contains information about each option. Please contact your representative for more information.

1. Complete Part I: Customer Specifications, pages 1-9. Please check just one option for each, unless we have indicated that multiple answers are appropriate. You may either fill this out directly in the Word document or print out and complete it. Page numbers may differ between the online and the printed document.
2. Have the appropriate person sign the customer authorization on the printed copy.

Return to your MARCIVE representative: mail, send a pdf, or fax the signed profile.

Customer Authorization

MARCIVE will perform the work described in this profile at the prices quoted in the letter referenced below or as mutually agreed in correspondence. These prices will be good for 12 months from the Date of Authorization below (date I signed this profile).

If I send the bibliographic file from which MARCIVE is to work more than once, and MARCIVE has already loaded the previous file, my library will be charged a loading fee of \$350. If the free test has already been generated from the previous file, a new test may be required at an additional cost of \$100. If my library cancels or postpones indefinitely a project in progress, MARCIVE reserves the right to bill for work performed up to that point. MARCIVE will output the database as I have specified in this form and, once my database has been shipped to me, I have 90 days to request replacement for any defective media. If after that time I request the database to be re-output, regardless of the reason, my library will be charged the complete cost of outputting the database again.

Date of last quote: _____ (Date supplied by MARCIVE representative)

Date of authorization: _____ (Date you signed this profile)

Authorized signature: _____ Title: _____

Institution: _____

1. *Customer information*

1.1 Customer address

Institution name _____

Address _____ City _____

State/Province _____ Zip/Postal Code _____

1.2 Billing address. Paperless invoices preferred.

Attention _____

Paperless invoice. Email address to send to: _____

Institution name _____

Address _____

City _____ State/Province _____ Zip/Postal Code _____

1.3 Contact names

MARCIVE, Inc., will provide the library's primary contact with the Specifications Test for loading into a test region of your local system. The primary contact views and approves the Test before work can proceed.

Primary contact _____

Title _____ Email _____

Phone _____ FAX _____

File preparation contact _____

Title _____

Email _____

1.4 Who should be notified when files are ready?

Name _____ Email _____

Name _____ Email _____

1.5 Method of Shipment

- UPS Ground Service
- UPS 2-Day Service (Not available for Canadian addresses)
- UPS Overnight Service
- Other: _____

2. *Customer Information*

2.1 Type of Library: _____ (Academic, Public, School, etc.)

2.2 Existing MARCIVE customer who has already received services from us. Please mark all that apply.

- MARC records or catalog card images. ID code: _____
- Barcodes or spine labels. ID code: _____
- Retrospective conversion. ID code: _____
- Authorities processing project. ID code: _____
- GPO or Documents Without Shelves. ID code: _____
- Other. ID code: _____

3. *Characteristics of library's data*

3.1 **Source of records to be upgraded**

- MARC
- MS Excel®
- Other (describe): _____

3.2 **Presence of audiovisual records**

- No. None of the cataloging represents AV.
- Yes. If so, how do we identify AV records in your file?

_____ Also search A/V Access. High quality audiovisual cataloging database. See quote.

3.3 **Character coding scheme of MARC record output**

- MARC-8 (standard MARC) output from local system
- UTF-8 (Unicode MARC) output from local system

3.4 **Library will send records via...**

- Secure Website
- Other: _____

3.5 **Number of Files sent**

Number of files: _____, this number represents

- the entire project, or
- just one batch

3.6 **Number of total records sent:** _____

4. *Conversion Options*

Bibliographic data pre-processing cleanup for backfile and ongoing authority control. These changes are done prior to the authority matching processing. No extra cost.

4.1 Upgrade all records

- Yes.
- No. Criteria for identifying subset: _____

4.2 Matching criteria

- Standard rules.
- Restrict matches to 5 years either way.

4.3 Subject Headings

- Library of Congress subject headings
- Sears headings
- National Library of Medicine
- Genre headings
- Other: _____

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

5.1 Name of company: _____

5.2 System: _____

Same system as data came from

- Yes
- No

5.3 Technical support person: _____

5.4 Email: _____

5.5 Phone number: _____

5.6 Will MARC records be going to library or vendor?

- Library. Address at 1.1
- Vendor. Address at 1.4
- Other: _____

5.7 Record control number (MARC control field 001)

- Standard practice.

- Put 001 from old record into upgraded record.
- Other: _____

5.8 Holdings information (your call number, barcode number, etc.)

- Same. Copy holdings information from the _____ field in the original record to the same field in the upgraded record. If you choose this option, skip to section 6.
- Different. Copy holdings information from the original record to different places in the upgraded record. See quote. Complete section 5.9 below.

5.9 Different placement of holding information in upgraded record.

Skip to Section 6 if the data is to be moved to the same field in the upgraded record.

Holdings data	Field in original record	Field in upgraded record
1. Call number		
2. Shelf location		
3. Barcode number		
4. Item type		
5. Copy number		
6. Volume number		
7. Price		
8. Other data		
9. Other data		
10. Other data		

6. Value added services

Authorities processing. IF AUTHORITIES PROCESSING IS CHOSEN, please complete an [Authorities Processing Profile](#). See the Authorities Processing [GUIDE](#) for more information

6.1 Authorities processing

- Apply automatic LC name and subject authority control.
 - If LC is chosen, apply Genre.
- Apply automatic MeSH authority control.
- Apply automatic Sears authority control.
- Do not apply any authority control

6.2 Matching authority records

- Do not supply authority records.
- Supply all appropriate authorities records.

If you choose to have us supply authority records:

- One file. If you choose to have MeSH processing, the MeSH authority records will be in a separate file.
- Two files: Authors and Titles in one; Subjects and Genre in a second file, plus a file of MeSH.
- Three files: Authors in one; Titles in a second; Subjects and Genre in a third file, plus a file of MeSH.
- Genre separate from Subjects.
- Other: _____

6.3 Electronic authority reports

- Do not supply any authority reports, other than the statistical report. "Authority Control Statistical Report."
- Unrecognized or Invalid Terms Report.
- Multiple Matches or High Probability Matches Report.
- Changed Authorized Terms Report.
- Preprocessing Changes Report.

6.4 Authorities processing after the Brief Record Upgrade project

- Standard Notification Service. See quote.
- Comprehensive Notification Service. See quote.
- Overnight Authorities. See quote

6.5 Add Syndetic Solutions Data

- Table of Contents (TOC) See quote.
- Fiction/Biography. See quote.
- Summaries. See quote.

*If any of these are checked, we request that you also complete a [MARC Record Enrichment Profile](#).

6.6 Add Reading Notes. See quote.

- Accelerated Reader
- Lexile

6.7 Add reading notes report. If you selected Accelerated Reader and Lexile, add a report of records enriched. See quote.

- Yes. Reading notes report.

6.8 Modify records to conform to RDA

- No
- Yes

7. *Handling of records not found*

7.1 Return of records not found

- Standard processing.
- Do not return no-hits.

7.2 Report of records not found

- Do not supply report of no-hits.
- Supply report. See quote.

7.3 Non-MARC input only: Mapping to MARC

- Do not map no-hits to MARC format.
- Map to MARC format. See quote.

7.4 Report of upgraded records

- Do not provide report of upgraded records.
- Provide report of titles upgraded. See quote

8. *Brief Record Upgrade products*

8.1 MARC bib records

- Return records in MARC

8.2 Character coding scheme

- UTF-8 (Unicode MARC)
- MARC-8 (Legacy MARC)

8.3 Size of Output Files

- Output records in files of maximum 50,000 records.
- Output records in files of maximum _____ records.

8.4 Format

- Secure Website.
Please indicate e-mail address of person(s) who should be notified when files are ready:

- Backup CD-ROM. See quote. Number of copies: _____

8.5 Smart Barcode Labels

- Yes

8.6 Barcode Number

- Use barcode number in old record, located in
MARC tag _____ subfield _____
- Create Barcode Number
Beginning barcode number _____

8.7 Symbology

- Codabar. If needed, library code: _____
- 3 of 9

8.8 Check digit

- Yes
- No

8.9 Number of barcode labels

- One per copy
- Two per copy

8.10 Name to appear on label (max 40 characters) _____

8.11 Copy & volume information

- Print copy & volume information (except c.1) on barcode label following call number.
- Do not print copy & volume information on barcode.

8.12 Generic barcode labels

- Generic barcodes. See quote.

Beginning number: _____

Number of labels: _____

8.13 Patron barcode labels

- Generate patron barcodes. See quote.

Beginning number: _____

Number of labels: _____

9. Timing options

9.1 Output at conclusion of project

- Yes. MARCIVE will output all records in a single batch at the conclusion of the project.
- No. MARCIVE is to hold the records for three or more months after the conclusion of the project. See quote for database output charges.

9.2 Output after each batch

- No. MARCIVE will output all records in a single batch at the conclusion of the project.
- Yes. MARCIVE is to output records after processing each batch. See quote for minimum charge.

10. Test Approval

After MARCIVE receives your files to be converted and this profile, you will receive a test of the above specifications. Please load these records into your local system and check:

- Do all of the records load properly?
- How do the locations and call numbers appear in your local system?
- Are there any specifications which need to be changed before we output the entire database?

We can be quite flexible at this stage—so please ask!