

## MARCADIA AUTOMATED CATALOGING SERVICE

### OVERVIEW

**M**arcadia®, offered jointly by OCLC® and Backstage Library Works, automates finding, evaluating, and delivering catalog records from OCLC WorldCat®. Based on search records you supply from your local system and the selection criteria you provide on a profile form, Marcadia selects matching records from WorldCat and delivers them to you.

Marcadia can merge designated local fields from your search records with the catalog records returned and provide electronic reports of non-hit and non-match records. You can adjust your selection criteria to suit your needs, and you can specify the number of times and the frequency with which Marcadia will continue to search non-hit and non-match records, eliminating the need for repeated manual searching.

With Marcadia, you can:

- Take advantage of WorldCat's catalog of bibliographic records to select copy created by libraries that most closely reflect your own cataloging practices, as well as copy with an acceptable cataloging level, LC classification number, and non-Roman scripts.
- Select the frequency and duration of repeated searches, to have *non-hit* and/or *non-match* records automatically resubmitted for searching at designated intervals.
- Choose custom selection criteria for a single batch of records or for all batches of records.
- Have records delivered to your own FTP server or retrieve them from a Backstage FTP server.
- Choose which electronic reports you would like to receive.
- Decide what local information you want to include in the delivered records and overlay the records in your local system.
- Have your records delivered in MARC-8 or UTF-8 encoding.
- Test your selection criteria prior to processing to ensure the best possible match rates.

### HOW MARCADIA WORKS

You supply information to Backstage Library Works to create a profile of your Marcadia preferences and selection criteria for matched records. When Backstage receives your order form and profile information, we will notify you by email. You then load a file of MARC 21 records (exported from your local system) onto the FTP server you specified in your profile (yours or ours) and email Backstage to let us know that you are ready to begin processing.

## **THE MARCADIA PROCESSING FLOW**

Marcadia retrieves your records from the specified FTP server and searches them in WorldCat according to the criteria that you specify in your profile. You may use the Marcadia defaults for search fields or select your own parameters. Marcadia then compares your search records to the pool of hits retrieved from WorldCat and checks the quality of each of those hits using your profile's verification criteria.

Among the hits, the first record to match all of your specified Perfect verification criteria is taken as the matched record and will appear in the returned file of Perfect Matches. If no records meet the Perfect verification criteria, then the first record to meet all the Acceptable verification criteria is taken and placed in your Acceptable Matches file.

Marcadia then merges any requested local fields from your original search records with the matching WorldCat records, saves the records in a file of Perfect Match and Acceptable Match records, and enters complete record representations of the match records in the Perfect Match Report and Acceptable Match Report.

Search records whose hits fail to meet the Perfect or Acceptable criteria are placed in a file of Non-Match records and listed in a Non-Match report. Search records for which no WorldCat hit is found are placed in a file of Non-Hit records and listed in a Non-Hit Report.

At the end of processing a batch, Marcadia returns the completed MARC records to the FTP server specified in your profile, along with a Statistics Report and reports of any Non-Hit and Non-Match records.

If you elect on your profile to have your records searched one time only, Marcadia also returns the files containing your search records for any Non-Hit and Non-Match records. If you elect to have standing searches of your Non-Hit and/or Non-Match records, Marcadia automatically resubmits these records at the designated intervals, generating new files and reports.

For each automatically submitted batch, Marcadia returns a Perfect Match file, an Acceptable Match file, a Non-Hit Report, a Non-Match Report, a Statistics Report, and any optional reports requested. Files of any remaining Non-Hit and Non-Match records are delivered after the last scheduled search interval is completed.

## WHAT'S REQUIRED

To use Marcadia, you need:

- A local system from which you can extract MARC 21 records for export to an FTP server. If you cannot export records in MARC 21 format, see "Backstage Supplemental Services" for information about custom programming available from Backstage Library Works.
- FTP client software. If you cannot use FTP, see "Backstage Supplemental Services" for information on sending and receiving physical media. If you use your own FTP server, you need enough storage to hold records exported from your local system and records delivered by Marcadia. Records from Backstage can be sent in the file sizes that you specify.
- A Marcadia Identifier (ID). This is the code that identifies your institution. If you currently have an OCLC institution symbol, your Marcadia ID will be the same as your OCLC institution symbol. If you do not have an OCLC institution symbol, Backstage Library Works will assign a Marcadia ID to you.
- A completed Marcadia Service Profile form, and a signed Service Agreement.

## FREQUENTLY USED TERMS

The following Marcadia terms are used frequently throughout this document:

TERM	DEFINITION
Hit	A WorldCat record, identified as a bibliographic match of a search record, that has not yet been filtered through the verification criteria.
Perfect Match	The first WorldCat record that matches all of the Perfect verification criteria.
Acceptable Match	The first WorldCat record that matches all of the Acceptable verification criteria (after a Perfect match is not found).
Unacceptable Match	A WorldCat record that matches a search record – and so qualifies as a Hit – but does not pass verification as either a Perfect or an Acceptable Match. You typically will not see these records.
Non-Match	A search record for which at least one initial hit was identified, but neither a Perfect match nor an Acceptable Match was found. A Non-Match record is the client's search record that corresponds with the WorldCat record described in the Unacceptable Match definition above.
Non-Hit	A search record that fails to retrieve any hits in WorldCat according to the specified Marcadia search criteria.

## YOUR SEARCH RECORDS

Marcadia performs batch searches of the WorldCat bibliographic database using search files that consist of machine-readable records extracted from your local system.

Search files are batches of records submitted on a specific date. Records in a batch are processed one record at a time, and there is no limit to the number of records in a batch. You can submit up to 26 batches of search records on any given date (batches A through Z; see "Naming Conventions").

The search records you extract from your local system should be in MARC 21 format and include at least the following fields:

- Format Identification – leader bytes 06 and 07
- Title – 245\$a
- Publisher – 260\$b
- Publication Date – 008/07-10 or 260\$c

Backstage Library Works can process records without the minimum fields; however, this might affect the accuracy of your hits and matches. For example, if you do not have a correctly delimited publisher's field (260), you could receive a match with an incorrect publisher, even though you have a fixed-field publication date.

Search records should have proper subfield delimiters to ensure accurate matching. If your local system does not export subfield delimiters, Backstage offers services to prepare your records for the best possible processing. See "Backstage Library Works Supplemental Services" for more information.

Abbreviated or truncated words in the Title (245) or Publisher (260 \$a \$b) field of your search record may also prevent accurate searching or matching.

If your records face any of the above challenges or other impediments to automated searching, Backstage also offers manual searching services, either to replace or to complement Marcadia.

## **PROFILES AND SELECTION CRITERIA**

### **WHAT IS A PROFILE FORM?**

You can specify what constitutes a match by the selection criteria you provide on your Marcadia Service Profile form. The Marcadia profile allows you to select two sets of criteria for delivered matches: Perfect Match Criteria and Acceptable Match Criteria.

Perfect Matches will meet all criteria you designate as required for a Perfect Match and will be ready for overlay on your local system.

Acceptable Matches will meet all criteria you designate as required for an Acceptable Match and may require inspection from cataloging staff before they are ready for overlay on your system.

If you plan on sending both types of matches through the same workflow, you may select the option to combine the Perfect Match and Acceptable Match results into one file (see Profile, Section III-B).

### **USING THE MARCADIA SERVICE PROFILE FORM**

The Marcadia Service Profile is used for recording your Marcadia preferences and specifying the selection criteria that any hit must meet before being accepted as a match.

#### **I. PROFILE IDENTIFICATION**

This section allows you to identify the profile you are submitting and specify when it should be used.

##### **A. PROFILE NAME**

First, in Section I-A, assign a name to your profile to identify it to your institution and to Backstage. This is especially important if your institution is planning to submit multiple profiles.

##### **B. PROFILE TYPE**

Use Section I-B to identify the type of profile you are submitting. There are three types of Marcadia profiles: Initial, Special, and Change. The same form is used to create all three profile types (see “Naming Conventions” for more information).

##### **INITIAL (DEFAULT) PROFILE**

The initial profile is the default profile, created as part of the Marcadia start-up for each institution. Changes can be made to this profile, free of charge, during the initial sample process until the final form of the profile is established. To use a Service Profile form for the initial profile, check the box marked “Initial (Default)” in Section I-B of the form.

##### **SPECIAL PROFILE**

In addition to your default profile, you can submit any number of special profiles for use with batches of records for specific collections or libraries, without altering your default profile. To use the Service Profile form for a special profile, check the box marked “Special” in Section I-B of the form.

### **CHANGE PROFILE**

The change profile is used to make corrections or changes to either a default or a special profile. For example, you might find that you need to adjust your selection criteria for a particular batch of records, or you might want to change your repeat search intervals.

To use the Service Profile form for a change profile, check the box marked "Change" in Section I-B of the form, and enter the profile name you want to change. There may be an additional charge for changing your profile.

### **C. INSTITUTION ADDRESS**

### **D. ADDITIONAL INFORMATION**

### **E. PRIMARY CONTACT**

In parts C-E, please identify your institution, OCLC institution symbol and ILS, and your library's primary contact for Marcadia.

## **II. DATA TRANSFER**

In Section II of the profile form, please specify the FTP server through which you would like to send and retrieve your records, and identify the file format you plan to use. You may send and receive bibliographic records in UTF-8 or MARC-8 format. If you need to use a different format, please specify.

You can specify use of a Backstage FTP server or your own FTP server for storing and retrieving your search files and delivering your matched WorldCat records and Marcadia reports.

### **USING A BACKSTAGE FTP SERVER**

To use a Backstage FTP server, check that item on your profile form. When Marcadia Support informs you – by emailing you a Profile Receipt Notification – that Marcadia is ready for use, you will be given the name and Internet domain of a Backstage FTP server, an account name, password, and the name of the directory on the FTP server to use for storing your search files and retrieving your records and reports.

Marcadia files will remain on the Backstage FTP servers for a period of 35 days from their delivery date, after which they will be deleted.

### **USING YOUR OWN FTP SERVER**

To use your own FTP server, check that item on your profile and enter the type of operating system you have running on your server (such as DOS, UNIX<sup>®</sup>, or Windows<sup>®</sup>). Enter the name and Internet domain of your server as `servername@serveraddress`. For example, if your server's name is "yoda" and the its domain is "ucsc.edu," enter yoda@ucsc.edu.

You must also provide a login ID and password and identify a directory name on your server for Marcadia to use. While the password you provide can be whatever you choose, the login account and directory names should follow the format described “Naming Conventions.”

In the event that Marcadia is unable to reach your FTP server, your files will automatically be delivered to a Backstage FTP server as a backup. If this situation occurs, we will notify you by email as to where you can retrieve your files.

Instructions for accessing a Backstage FTP server are included in each Profile Receipt Notification sent to you by Backstage Library Works. If you have questions about retrieving backup files, contact Marcadia Support at 1-800-288-1265 x.222 or email [marcadia@bslw.com](mailto:marcadia@bslw.com).

### **III. Processing Options**

#### **A. SEARCH SCHEDULE**

Section III-A allows you to indicate the schedule you would like for repeat processing of Non-Hit and Non-Match records.

#### **DO NOT SEARCH AGAIN**

Selecting the “No, do not search again” option means that a batch of search records is searched one time only. Any Non-Hit or Non-Match records are returned in separate files at the end of processing for that batch.

Marcadia automatically returns a file of matches, a Non-Hit file and Non-Hit Report, a Non-Match file and Non-Match Report, and a Statistics Report to the designated FTP server. If requested in your profile, a Perfect Match Report and/or an Acceptable Match Report may also be delivered.

#### **REPEAT SEARCHES**

Selecting the “Yes” option on Section III-A of your profile form sets up a standing search for Non-Hit and/or Non-Match records from a batch. You can indicate on your profile which files you want resubmitted for further searching: the Non-Hit file, the Non-Match file, or both files.

You must specify a frequency for Marcadia to automatically search any Non-Hit or Non-Match records after the initial search. The search frequency can be set to:

- Once only
- Weekly
- Biweekly
- Monthly
- Quarterly
- Semi-annually
- Annually
- Other intervals as you specify

You must also specify many times Marcadia is to continue to automatically search Non-Hit and/or Non-Match records from a batch. You can specify a count that will maintain searches from 1 to 24 months.

When the initial search of the batch is complete, Marcadia returns files of Perfect and Acceptable Match records, a Statistics Report, and separate reports for any Non-Hit and Non-Match records.

The files of Non-Hit and Non-Match records are resubmitted at the specified intervals for further searching. Each time Marcadia searches Non-Hit and Non-Match records from a batch, if matches are found, Marcadia returns a new file of matches, a new Statistics Report, and new reports of any remaining Non-Hit and Non-Match records.

When all requested search intervals are complete, if there are any remaining Non-Hit or Non-Match records from the initial batch, Marcadia returns these records in separate files, along with the other files and reports generated by the last search interval.

**PLEASE NOTE:**

For repeat searches, each time Non-Hit and Non-Match records are resubmitted, Marcadia generates new report files *with the same names as those for the initial search, overwriting any existing report files* that have those names. To prevent Marcadia from overwriting an existing file, you should rename any Marcadia reports that you wish to keep on the FTP server before the standing search interval elapses.

**B. DELIVERY OF MATCH RESULTS**

Section III-B allows you to select whether you only want Perfect Matches, or if you'd like to find an Acceptable Match in cases where no Perfect Match is identified.

**C. DELIVERY OF SEARCH RECORDS**

Section III-C gives you the option of combing the returned search records from both the Non-Match file and the Non-Hit file.

**D. REPORTS**

In section III-D, please select the reports you would like to receive.

**E. REPORT DISPLAY**

In section III-E, you may select the records you would like displayed in the reports.



#### IV. SEARCH/VERIFY CRITERIA

##### A. SOURCE INSTITUTION PREFERENCE.

Marcadia can filter search results by the institution that submitted a record to WorldCat. Please identify institutions by their OCLC symbols, where known.

If you want Marcadia to retrieve records *only* from a particular institution (or list of institutions), designate that institution as an Exclusive Source.

If you want to check for records from an institution first, then take the Master WorldCat record if none is available from your selected source(s), specify that institution as a Preferred Source.

If you wish to avoid records from a particular institution, mark that institution as an Unacceptable Source.

If you do not want records from your own institution returned to you, please check *“Exclude records held by my institution.”*

Because of the configuration of the WorldCat Master record file and the Institution record file, the preliminary search returns **only** Master records. If you choose specific institution records as Preferred or Exclusive, those institution records will be retrieved, using the control number of the institution to filter the Master records.

If you wish to search **all** institution records, please choose *“Search both Master records and Institution records”* so that all Institution records associated with the matched Master records will be retrieved and evaluated.

##### B. FIELDS TO SEARCH

Marcadia searches your records in WorldCat by the criteria you specify. The default search is LCCN, ISBN, ISSN, and Title Phrase. You have the option in the profile to make changes or additions in the default searches. All WorldCat records found that match any of the fields in your search record are placed in a pool of Hit candidates.

MARC FIELD	SUBFIELD	WORLDCAT INDEX	NOTES
010	\$a \$z	LCCN	Suffixes are dropped.
020	\$a \$z	ISBN	Parenthetical information is dropped.
022	\$a \$z	ISSN	Parenthetical information is dropped.
245	\$a \$b \$n \$p	Title Phrase	The title is searched with right truncation at 130 characters; non-filing characters are dropped according to second indicator; subfields are concatenated in the order they appear in the record; diacritics and punctuation are removed.

### C. FIELDS TO VERIFY

For each hit in the pool of candidates, Marcadia verifies the accuracy of the matches using the verification criteria that you specify. The default verification fields are Type of record, Bibliographic Level, Form of item, ISBN, Title, Edition, Publisher and Publication date. The following conventions are used in the verification process:

FIELD	MARC TAG	SUBFIELD OR POSITION	NOTES
Type of record (Type)	Ldr	06	
Bibliographic Level (BLvl)	Ldr	07	
Form of item (Form)	008	23	
Title	245	\$a \$b \$n \$p	The search is the same as that in the search above, except only the first 40 characters are searched. For music, only \$a is compared.
Publication Date	008 or 260	07-10 or \$c	Everything but numbers is dropped; 2- and 3-digit numbers are compared with a date range; for example, if the date is 197, dates from 1970 to 1979 are acceptable; if 008/07-10 and 260 \$c exist, 008 is searched first; if no 008 match is found, 260 \$c is searched. Field not used for verification if hit was on 024 or 028.
Publisher*	260	\$a \$b	In each subfield, the first word of more than two characters is searched anywhere in the whole 260 field in the WorldCat record; if the first search results in no match, the second word greater than two characters is searched. Field used for verification only if hit was on 245.
Edition	250	\$a	Unless a numeral is present, the entire string is compared; if a numeral is present in the search record, it is compared with the entire field in the WorldCat record. Field used for verification only if hit was on 245.
ISBN	020	\$a or \$z	Used for verification only if hit was on 245. If both the search record and the hit contain an ISBN, the fields must match. If the search record contains an ISBN, but the match doesn't, the fields are considered a match. If the search record does not contain an ISBN, but the match does, the fields are considered a match.

Except for the title, each verification field is searched as a non-normalized string, and punctuation can affect a match. As a default, if a search record or a WorldCat hit lacks one of the verification fields, that field is no longer considered in the verification process. For example, if a search record lacks an edition statement,

but all other verification fields match a WorldCat record containing 250\$a 1st edition, that record will be verified as a hit.

\*A cataloger's choices in format, abbreviation, and diacritics in the 260\$b may impede accurate matching. Depending on the nature of the collection being searched, eliminating these fields from your verification criteria might significantly improve your hit rates.

#### **PERFECT vs. ACCEPTABLE**

Each field you specify in section IV-C is assigned as a Perfect or an Acceptable verification criterion. A Perfect Match will meet all of the required criteria you specify.

You may have some criteria whose absence or contradiction may still lead you to consider the record Acceptable. For example, because Publisher can be a problematic verification point, you might feel that records that do not match on this point – but match on all other points – may still be valid for your purposes.

In this instance, you would choose to designate every field in the criteria list as a required element, except the Publisher, which you indicate is “*Acceptable if Contradicting.*” This will put the record into the Acceptable Match file if the publishers differ, but all else matches, so you can review it later. If the publishers match, the record will go into the Perfect Match file.

At the end of the search and verify process, Marcadia has a pool of match candidates to filter through your required match criteria.

#### **D. REQUIRED MATCH FIELDS**

After a record is verified as a match, you may wish to require additional fixed field values, tags, subfields or data in the matching record or to exclude records with specific information. In section IV-D, you are given a list of possible items that you may require to exist or not exist in the matching record in order for the record to be placed in the Perfect Match file.

You may select as many of the items for consideration as you would like, and you can designate your own additional criteria.

For example, you might not be interested in a record unless it contains an LC call number in the 050. If this is the case, check the “Must be present...” box and the “Reject as NON-MATCH if absent...” box.

If you would still like the record, so long as everything else in the record complies, check the “ACCEPTABLE if absent...” box.

If you don't care either way, check the “Do not use as match verification criteria” box.

An entry in the Expression column of Section IV-D is not required. Placing something in the Expression column means that the specific data you note exists

in the field, such as “a” for the Descriptive Cataloging Form or [blank] for the Encoding Level. You may enter as many Expressions per field as you like.

#### **E. OPTIONAL MATCH FIELDS**

These criteria will be used to select the best record from a collection of Perfect or Acceptable records that have identical required match criteria.

### **V. CUSTOM FIELD PROCESSING**

#### **A. 001 PROCESSING**

When a matching record is delivered to you, the original control number (001) in your search record is copied into the matching record for overlay purposes. The control number from the match is copied into an 035 field. Please indicate the prefix you would like added to the control number copied into the 035.

If your system requires the 035 field rather than the 001 field for record overlay, you must indicate this on your Service Profile form.

#### **B. FIELDS TO MERGE AND**

#### **C. FIELDS TO DELETE**

On your profile form, you can specify any local fields from your search records (for example: *control number, holdings, local notes*) that you want to have merged with the cataloged records delivered. Marcadia is also able to change field and subfield designators when the tag is copied.

You can also specify any fields you would like deleted from the matching record.

#### **D. OTHER CUSTOM REQUESTS**

If there is any other work you would like to have done, please let us know. We can to make changes in bibliographic records, map item and holding information, clean up bibliographic records, etc. There may be an additional charge, depending on the amount of work needed.

## **RECORDS DELIVERED**

Marcadia automatically delivers four types of files containing records:

- File of Perfect Match records
- File of Acceptable Match records
- File of Non-Match records
- File of Non-Hit records

## **FILES OF PERFECT MATCH AND ACCEPTABLE MATCH RECORDS**

Complete WorldCat records are delivered in two separate files. The Perfect Match file contains WorldCat matches that matched all the Perfect criteria. The Acceptable Match file contains WorldCat records that did not match the Perfect criteria, but did match the Acceptable criteria. If you would like the Perfect and Acceptable match files to be combined into one file, please check "Yes" in Section III-B.

Match records are returned in MARC 21 format by default. The following fields are included in each delivered match record:

Search record control number in the 001 field

WorldCat ID of the matched record in the first 035 field

Any other local fields you have selected for merging from your original search records or from the WorldCat records

## **FILE OF NON-MATCH RECORDS**

If none of the WorldCat hits for a particular search record match the Perfect or Acceptable criteria, the WorldCat hits are placed in a file of Unacceptable Matches. This file of WorldCat records may be used to generate an Unacceptable Match report, which is available for an additional charge. (See "Rates for Basic Marcadia Cataloging Service via FTP".)

The search records used to generate the Unacceptable Match file will be placed in a file of Non-Match records, which is automatically delivered for no additional charge with each batch processed. If you requested on your profile to repeat searches for any Non-Hit records, this file is resubmitted for searching at the specified intervals.

## **FILE OF NON-HIT RECORDS**

At the end of processing, Marcadia automatically returns a file containing any search records from the batch for which no WorldCat hits were found. If you requested on your profile to repeat searches for any Non-Hit records, this file is resubmitted for searching at the specified intervals.

## **ELECTRONIC REPORTS**

Marcadia generates several electronic reports for each batch of records searched. The following reports are delivered as requested to the specified FTP server:

- Perfect Match Report
- Acceptable Match Report
- Non-match Report
- Non-hit Report
- Statistics Report

Reports are returned in the order in which they are processed and not sorted. All report headings, except the Statistics Report, show the name of the report, the institution's name, and the Marcadia ID. Each record listed in a report is separated by two blank lines and contains, but is not limited to, the following fields, if present in the record:

001 – Control Number  
035 – System Control Number  
090 – OCLC-defined CALL  
1XX – Main entry  
245 – Title  
260 – Imprint  
9XX – Any local fields from the search record or local  
WorldCat fields, as specified on the profile

## PERFECT MATCH REPORT

This report is optional and delivered only if you request it on your profile. Records listed in the Perfect Match Report are complete record representations of the MARC records contained in the file of match records delivered by Marcadia.

MARCADIA PERFECT MATCH REPORT  
ANYWHERE LIBRARY  
ABCD  
01/10/2008  
56 RECORDS

```

leader      01243cam a2200361 a 4500
001         ocn128898293
003         OCoLC
005         20080227203124.0
008         020926s2002    sa a          000 1 eng d
035         $a(CSUG)a5048431$6MERGED
040         $aOI@$cYUS
020         $a1874923612 (pbk.)
020         $a9781874923619 (pbk.)
035         $a(OCoLC)128898293
035         $a(CtY)6027741
035         $a(CStRLIN)CTYA6027741$B
050  4      $aPR9369.3.K34$bA44 2002
079         $aocm50675730
090         $aPR9369.3 K34$bA44 2002
100  1      $aKantey, Peter.
245  10     $aAll of you :$bpoems /$cPeter Kantey ; [illustrations by Marc
Glaser].
260         $aPlumstead [South Africa] :$bSnailpress,$c2002.
300         $a[11] p. :$bill. ;$c18 cm.
650  0      $aSouth African poetry$y20th Century.
650  0      $aPoets$zSouth Africa.
651  0      $aSouth Africa$xPoetry$y20th Century.
700  1      $aGlaser, Marc,$d1936$
852  00     $aCtY$b$ml$hPR9369.3 K34$iA44 2002
952         $a50675730$bOI@$bUNIV OF CAPE TOWN$hFull OCLC
member$iLCC$u20070311
952         $a128898293$zYUS$bYALE UNIV LIBR$hFull$iLCC$u20070517
952         $a179100849$zPUL$bPRINCETON UNIV$hFull$iLCC$u20071028
994         $aZ0$bMALCO
948         $hNO HOLDINGS IN MALCO $ 12 OTHER HOLDINGS

```

## ACCEPTABLE MATCH REPORT

This report is optional and delivered only if you request it on your profile.  
Records listed in the Acceptable Match Report are complete field representations  
of the MARC records contained in the file of Acceptable Match records delivered  
by Marcadia.

### MARCADIA ACCEPTABLE MATCH REPORT

ANYWHERE LIBRARY

ABCD

01/10/2008

24 RECORDS

```

leader      01362cam a2200385 a 4500
001         ocn178643419
003         OCoLC
005         20080227203124.0
008         020910s2002    ie          000 d eng d
035         $a(CSUG)a4824902$6MERGED
040         $aNNF$cPUL
020         $a1856353907
020         $a9781856353908
035         $a(OCoLC)178643419
035         $a(CtY)6113803
035         $a(CStRLIN)CTYA6113803$B
035         $a(NjP)3868829
079         $aocm50570158
100  1      $aFarrell, Bernard.
245  10     $aLovers at Versailles ;$bThe spirit of Annie Ross /$cBernard
Farrell.
260         $aCork, Ireland :$bMercier Press,$cc2002.
300         $a251 p. ;$c20 cm.
500         $aPlays.
541         $aEx copy is gift of Leonard L. Milberg '53 for the Milberg Irish
Playwrights Collection.$5NjP
650  0      $aEnglish drama$xIrish authors$y20th century.
700  12     $aFarrell, Bernard.$tSpirit of Annie Ross.$f2002.
998         $s9115
904         $agls$bg$hm$cb$e20030402
902         $amrf$bzm$7m$dv$f1$e20030423
952         $a50570158$zVYF$bFORDHAM UNIV$hFull OCLC member$kDDC$u20080119
952         $a129278391$zYUS$bYALE UNIV LIBR$hFull$iLCC$u20070517
952         $a143251158$zNYP$bNEW YORK PUB LIBR RES LIBR$hFull$u20070611
952         $a178643419$zPUL$bPRINCETON UNIV$hFull$u20071027
994         $aZ0$bMALCO
948         $hNO HOLDINGS IN MALCO $ 34 OTHER HOLDINGS

```



### NON-MATCH REPORT

This report lists search records for which WorldCat hits were found but the hits did not meet your Perfect or Acceptable Match criteria. The Non-Match Report is delivered automatically.

MARCADIA Non-match REPORT  
ANYWHERE LIBRARY  
ABCD  
01/10/2008  
5 RECORDS

leader	00398cam a22001095 4500
001	a4820644
008	020905s1999 oku 000 0 eng u
100 1	\$aStanley, Thomas M.
245 00	\$aGeologic map of the Spencer and Jones 7.5' quadrangles, Oklahoma County, Oklahoma.
260	\$aNorman, Oklahoma :\$bOklahoma Geological Survey,\$c1999.
300	\$a1 map.
440 0	\$aOpen file\$report / Oklahoma Geological Survey ;\$v3\$99

### NON-HIT REPORT

This report lists search records for which no WorldCat hit was found. The Non-Hit Report is delivered automatically.

MARCADIA Non-hit REPORT  
ANYWHERE LIBRARY  
ABCD  
2/19/2008  
7 RECORDS

leader	00370cam a22001095 4500
001	a4822570
008	020909s2001 pau 000 0 eng u
100 1	\$aOdden, Allan.
245 10	\$aEnhancing teacher quality through knowledge\$ and skills\$based pay /\$cAllan Odden.
260	\$aPennsylvania :\$bUniversity of Pennsylvania,\$c2001.
300	\$a11 p.
440 0	\$aCPRE policy briefs ;\$vv. 34

## STATISTICS REPORT

This report contains a summary of the processing for each batch of search records. A Statistics Report is generated for the initial search of a batch, and for any standing search batches. The report includes your Marcadia ID, the date and time the process started and completed, the number of records searched, the number of search records with hits, the number of Perfect Matches, the number of Acceptable Matches, the number of Non-Matches, and the number of Non-Hits, along with the hit rate and the match rate. The Statistics Report is delivered automatically.

-----  
Marcadia Statistics  
ABCD Library  
-----

Id: ABCD  
Date Started: 2/27/2008 6:30:35 PM  
Date Finished: 2/27/2008 6:39:42 PM  
Total Hours: 0.15  
Records Searched: 2967  
Search Records With Hits: 1186  
Perfect Matches: 370  
Acceptable Matches: 186  
Total matches: 556  
Non Matches: 630  
Non Hits: 1781  
Total Non Matches: 2411  
Hit Rate: 39.97%  
Perfect Match Rate: 12.47%  
Acceptable Match Rate: 6.27%  
Total Match Rate: 18.74%

## USING MARCADIA

There are five steps to using Marcadia:

1. You send a Marcadia Service Profile form to Marcadia Support at Backstage Library Works.
2. Marcadia Support emails you a Profile Receipt Notification that includes a Begin Search Notification template.
3. You transfer your search files to the FTP server and email a Begin Search Notification to Marcadia Support.
4. Marcadia processes your files.
5. Marcadia Support emails you a Results Ready Notification.

## BEGIN SEARCH NOTIFICATION

When you receive your Profile Receipt Notification, follow the instructions therein; transfer your search files to the specified FTP server, then email a completed copy of the Begin Search Notification back to Marcadia Support, at [marcadia@bslw.com](mailto:marcadia@bslw.com).

You must complete and email a copy of the Begin Search Notification for each batch of search files you place on the FTP server.

## UPDATING OR CHANGING YOUR PROFILE

You can update or make changes to an existing profile at any time. Do this by completing and submitting a new Marcadia Service Profile form and checking the box at the top of the form marked Change under Profile Types (Section I-B of the form). Be sure to enter the name and version number of the profile you want to change. You can make as many changes to the profile as you like during the sample period. After that, there may be an additional charge.

## TESTING MARCADIA

In order to help you achieve a good match rate, Marcadia includes an initial 100-record test as part of the start-up fee. Testing allows you to preview the match rates you will achieve with your selection criteria, allowing you to adjust your criteria prior to searching a large batch of files.

Each 100-record test automatically returns a Perfect Match file and report, an Acceptable Match file and report, a Non-Hit file and report, a Non-Match file and report, and a Statistics Report.

## **NAMING CONVENTIONS:**

### **MARCADIA NAMING CONVENTIONS ARE:**

- **LOGIN ACCOUNTS**

All Marcadia account names consist of a Marcadia ID plus the letters DIO (all uppercase) appended. For example, if your Marcadia ID is CABC, your Marcadia account name will be CABCDIO.

- **DIRECTORIES**

All Marcadia directory names consist of a Marcadia ID plus the letters DIO (all uppercase) appended to it. For example, if your Marcadia ID is CABC, your Marcadia directory name will be CABCDIO.

- **SEARCH FILES**

Your search files must be named yymmddA, where yy represents the two-digit year, mm represents the two-digit month, and dd represents the two-digit day. The A indicates the batch number of the file (A-Z), with A representing the first batch, B the second batch, C the third batch, and so on. For example, if you submit a single file of search records on January 10, 2008, the name of your search file will be 080110A.

If you have only one batch of search records on any given date, use batch number A. If you have more than one batch of search records on the same date, use the letters B through Z to distinguish the batches. For example, if you submit four batches of search files on January 10, 2008, you will have four files named 080110A, 080110B, 080110C, and 080110D, all of which will be placed on the FTP server specified in your profile.

- **PROFILES**

The three types of Marcadia profiles (initial, special, and change) each have their own naming conventions. A copy of the Marcadia Service Profile form is used for all profile types, by specifying the type of profile in Section I-B of the form. All profile names and version numbers are assigned by Marcadia Support.

- **INITIAL (DEFAULT)**

Your initial (default) profile is named profileA.001, where A indicates your default profile, and 001 indicates this is the first version of profileA.

When you submit changes to this profile, only the version number will change. For example, the first set of changes to profileA.001 will produce a new profile name of profileA.002.

- **SPECIAL**

You can have as many special profiles as you want. Special profiles use the names profileB.001 through profileZ.001, where B through Z indicates an special profile name, and 001 indicates the first version of that profile.

For example, profileB.003 identifies the third version of a special profile named profileB. ProfileD.001 identifies the first version of an special profile named profileD.

- **CHANGE**

Change profiles are used to make changes to either the initial profile (profileA) or an alternate profile (profileB through profileZ). Whenever a change is submitted, you must specify the name of the profile you want to change and its version number.

For example, suppose you wanted to change the third version of an alternate profile named profileH.003. Create a new Marcadia Service Profile form, check Change under Profile Types, enter the name profileH.003 to the right of the checked box, then complete the form with your changes and return it to Marcadia Support.

When Marcadia Support receives your changes, they will email you a Profile Receipt Notification that includes the new profile name and version number of profileH.004. You then transfer your batch of search records for this profile to the FTP server, and email a completed Begin Search Notification that includes the new profile name and version number to Marcadia Support.

- **FILE NAMES FOR RECORDS DELIVERED**

Marcadia delivers files of Perfect match records, Acceptable match records, Non-hit records, and Non-match records. The files of Perfect and Acceptable match records contain the actual completed MARC records to be used for system overlay. The files of Non-hit and Non-match records contain the original search records from a batch for which either no hit was found or the hit failed selection filtering.

All file names use the name of the search file with a special file extension appended to it.

- **PERFECT MATCH RECORDS (YYMMDDA.PM)**

Marcadia saves Perfect match records in a file named yymmddA.pm, where yymmddA identifies the name of the search file that the records originated from, and .pm is the file extension used to identify the records contained in the file as Perfect matches. For example, a file named 970310B.pm contains match records from a search file named 080310B; that is, the second batch of search records submitted on March 10, 2008.

**NOTE: If you select option III-B in the profile to combine your Perfect and Acceptable match files into one file, the extension .m will be used.**

- **ACCEPTABLE MATCH RECORDS (YYMMDDA.AM)**

Marcadia saves Acceptable match records in a file named yymmddA.am, where yymmddA identifies the name of the search file that the records originated from, and .am is the file extension used to identify the records contained in the file as Acceptable matches. For example, a file named 970310B.am contains match records from a search file named 080310B; that is, the second batch of search records submitted on March 10, 2008.

**NOTE: If you select option III-B in the profile to combine your Perfect and Acceptable match files into one file, the extension .m will be used.**

- **NON-HIT RECORDS (YYMMDDA.NH)**

Search records for which no WorldCat hit is found are placed in a file named yymmddA.nh, where yymmddA identifies the name and batch of the search file the records are from, and .nh is the file extension used to identify the records contained in the file as Non-hits. These records are identical to the original search records.

- **NON-MATCH RECORDS (YYMMDDA.NM)**

Search records for which a verified WorldCat hit was found but the hit did not meet your Perfect match or Acceptable match criteria are placed in a file named yymmddA.nm, where yymmddA identifies the name and batch of the search file the records are from, and .nm is the file extension used to identify the records contained in the file as Non-match records. These records are identical to the original search records.

- **NAMES OF REPORTS DELIVERED**

Report names use the name and batch of the original search file with special file extensions appended, as follows:

- **PERFECT MATCH REPORT (YYMMDDA.RPM)**

For a batch of search records submitted on March 10, 2008, the Match Report would be named 080310A.rpm.

- **ACCEPTABLE MATCH REPORT (YYMMDDA.RAM)**

For a batch of search records submitted on March 10, 2008, the Match Report would be named 080310A.rpm.

- **NON-MATCH REPORT (YYMMDDA.RNM)**

For a batch of search records submitted on March 10, 2008, the Non-match Report would be named 080310A.rnm.

- **NON-HIT REPORT (YYMMDDA.RNH)**

For a batch of search records submitted on March 10, 2008, the Non-hit Report would be named 080310A.rnh.

- **STATISTICS REPORT (YYMMDDA.STA)**

For a batch of search records submitted on March 10, 2008, the name of the Statistics Report would be 080310A.sta.

## GETTING HELP

If you have general questions about ordering Marcadia or filling out the forms, contact Marcadia Support via email to [marcadia@bslw.com](mailto:marcadia@bslw.com).

Once Marcadia has been set up for you to use and you have received a Profile Receipt Notification from Marcadia Support, please direct all questions to Marcadia Support at 1-800-288-1265 x.222, or send email to [marcadia@bslw.com](mailto:marcadia@bslw.com).

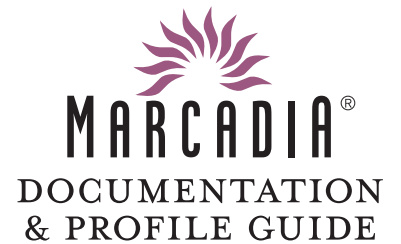
## ORDERING

To order Marcadia, contact your Backstage sales rep or email [marcadia@bslw.com](mailto:marcadia@bslw.com) to request a Service Profile form and a Service Agreement. When you receive your packet, read and sign the Service Agreement, complete the Service Profile form, then email or fax the completed paperwork to Marcadia Support, as described on the documents.

## SUPPLEMENTAL SERVICES

Beyond the services Marcadia provides, Backstage Library Works offers the following supplemental services, at additional cost:

- Use of physical media – If you do not have FTP capability, you can use Marcadia by sending and receiving physical media. The following types of media are available: 4mm tape, floppy diskette, and CD-ROM.
- LC Call Number verification – For automated LC reclassification, this supplemental selection filter for MARC field 050, 090, or 950 is available. This will be the last filter applied, after all other selection criteria are applied. For each match, call numbers in the 050, 090, or 950 fields will be verified against the latest edition of the LC Classification Outline. If the classification number in the match lies within the range of valid LC Call Numbers, then the call number is retained in the match record; otherwise, the call number is deleted.
- Electronic Call Number Selection Report – This is a report of titles with multiple valid LC Call Numbers. You can manually select call numbers to be merged.
- Custom programming for format changes – Changes can range from simple (change of one MARC tag to another) to complex (conversion of non-MARC or non-MARC 21 data to MARC 21). Contact Backstage Library Works for a list of available non-MARC 21 formats and time schedules for non-MARC 21 to MARC 21 conversions.
- Manual review and edit of non-verifies – Since many non-verifies can result from typographical errors and other problems with the search record, Backstage Library Works offers manual review and edit of non-verifies to improve the match rate.
- Full contract cataloging – For non-verifies, you can submit the items or photocopies of title page, verso, preface, and table of contents for full contract cataloging.



- For non-verifies and matches without LC call numbers – Backstage Library Works offers professional classification. You have the option of submitting the items or photocopies of title page, verso, preface, and table of contents for the classification, or the MARC record itself can be used.
- AACR2 upgrades – Upgrade pre-AACR2 MARC records to current AACR2 standards; automated, or automated with manual review options are available.
- Barcodes, spine labels, and shelf list cards – These include smart, dumb, and smart-barcode-and-spine-label-combination, with multiple format options available. Spine label and shelf list card printing are available in Latin, Hebrew, and Cyrillic scripts.

**For more information, contact us at [marcadia@bslw.com](mailto:marcadia@bslw.com) or call 1-800-288-1265 x.222.**