Extracting Government Document MARC Records from SirsiDynix Symphony for ASERL COE
(Procedures summary written 5/31/2011 per SirsiDynix Symphony 3.3.1)

A. Run "Extract Keys for MARC Export" report. The purpose of this report is to compile in a text file a list of the catalog keys for title records in the Symphony database which match the specified criteria selected on the tabs of the report template.

    1. On the Bibliographic Reports tab, select and open the "Extract keys for MARC Export" report.
    2. Use the criteria on the Item Selection tab of the report template to specify how to identify the records in the government documents collections, or scan barcodes for individual items on the Items ID tab of the report template.
    3. Schedule the report to run at the desired time.

B. Run the MARC Export utility. This utility extracts the MARC records for each catalog key in the file generated by the extract keys report.

    1. On the Utility menu, select the "MARC Export" wizard.
    2. On the MARC Export properties page, select "Marc" as the format of the output file.
    3. On the MARC Export properties page, select "Export Symphony catalog key to MARC tag" and select "902" from the drop-down menu list.
    4. On the MARC Export properties pages, select "Export all records to one file" or select "Include ___ records in each file and enter how many records should be contained in one file. This value may be specified based on advice received from ASERL.
    5. Click "OK".
    6. On the Export tab, select "On client" to save the file(s) of records to the local workstation.
    7. Use the gadget after the "File name on client" text box to specify the location and name of the file to be created on the workstation. If the entity receiving the file has specifications concerning a naming scheme and/or file extension, be sure to comply with those.
    8. Select the file to be exported from the drop down list.
    9. Repeat steps 6-8 for each file to be created/exported.
    10. At the end of each file's export process, a message will display indicating the number of records saved in that file. If you must provide a record count to the entity receiving the records, be sure to record the numbers from those messages.

NOTE: It is very important that the MARC Export utility be run almost immediately after the "Extract Keys for MARC Export" report is run. If another "Extract Keys" report is run before the records are exported, then the previous files of catalog keys will be overwritten. The "Extract Keys for MARC Export" report is password-protected by default to prevent such accidental overwriting, but depending on who has the password to that report at any given institution will determine the possibility of that kind of event happening.

C. Modify data in the records per ASERL specifications as outlined in the Database Fields.xls and Terminology for 583 field (April 2011 revision).docx documents. These documents can be referenced for clarification as needed.

    1. Use a utility like MarcEdit to remove all prefixes and any leading zeros from the OCLC numbers in the 001 field.
    2. Use a utility like MarcEdit to construct a link back to the library's OPAC for the record in the 902 field. The prefix "*CFDP" is required at the beginning of the field.

3. If needed, use a utility like MarcEdit to create the 901 (Placeholder ID) and 909 (Standardized Agency Filter) fields. The prefix "*CFDP" is required at the beginning of each of these fields if created.

D. After any local modifications, transfer the exported record file(s) to the destination specified by ASERL.