

Side Loading Overview

- 1) Requesting a side load can be done by emailing pika@marmot.org, or submitting a [YouTrack](#) ticket to the [Pika Inbox](#).
- 2) Members may be sent a document with the [Pika - Side Loading Roadmap](#).
 - On this document is a link to the [Side Loading Pros & Cons](#) document.
 - **Note:** on July 7, the mentioned documents will be available on Marmot.org under the Pika Documentation and Training page.
- 3) Marmot Members & Discovery Partners, who are requesting side loading of a collection for the first time, will need to get the Marc records for the full set of the collection from their vendors.
 - Both parties will need to find out from their vendors if the updates will be in a full set of the collection with updates, or a file with added and/or deleted files or updates.
- 4) An [ftp account](#) will need to be established for your library.
 - Marmot will setup an ftp account for anyone who does not already have an account.
 - For anyone who already has an ftp account, Marmot will create directories for each particular side load.
 - **Note:** The Public IP is needed to allow you to connect to the ftp server through Marmot's firewall. (To get your public IP visit www.whatismyip.com or ip4.me from the machine you would send files from.)
- 5) Once Marmot has the Marc records, we will set up a side load on the Pika test system.
- 6) Marmot will be able to automatically add your proxies. We just need to know how to format the proxy URLs.
- 7) Once the side load has successfully been set up in the test system, Marmot will ask the library to review the content to make sure the links work correctly, and the content is displaying properly.
 - There could be potential issues with grouping due to the vendor being listed as the author, so all records group together.
 - Sometimes with a new vendor, there are unforeseen issues where code work is needed by Marmot.
 - Any collection that is currently in Sierra will need to be suppressed on the same day the sideloaded collection goes live. Members will need to suppress these bibs and items.
- 8) A few examples of side loaded collections:
 - [Lynda.com for Vail Public Library](#)
 - [Alexander Street Press for Colorado Christian University](#)
 - [Colorado State Government Documents for CMC](#)

Side Loading Pros

- Any updated Marc records that are sent to Marmot will be updated overnight.
- Marmot can control who sees your side loaded records. These records will be listed under [Records to Include](#). Marmot will add the collections to a library's records to include in Pika.
- Records do not need to be loaded into Sierra to save time for catalogers.
- Once a collection has been side loaded into Pika for one library, it is easy to do the same process for another library.
- Lynda.com and Hoopla sends records directly to Marmot, so the ftp process is not necessary
- If you are getting updates through an ftp server from the eContent vendor, Marmot may be able to automate checking the server, and getting updates automatically
- Even though records are not in Sierra, you can still get ownership statistics
 - The statistics will be in Pika under [Indexing Statistics](#)
 - Statistics are kept daily for one month, and monthly afterwards
 - You will need Cataloging, Library Admin or Opac Admin permissions to see these statistics

Side Loading Complication (EDS)

Academics who send their records to EBSCO Discovery Services (EDS) have a few more steps to complete the side loading process.

- Records are not being exported directly to EBSCO
- Need to contact EBSCO about setting up a separate profile
- EBSCO has to be aware of the new URLs for the content in Pika
- The other issue is if these records were previously part of the export of records from Sierra that is sent to EDS.
 - If they are (maybe they are not because they are EBSCO items), they would not be part of the export to EDS once suppressed in Sierra.
 - The records can be included again in the EDS export, but it also requires EDS to create a custom URL for them by filling out [a new custom catalog questionnaire](#) (which may have a fee associated with it)
- **EDS Pro**
 - Once things are setup with EDS, Marmot can send the side loads to them directly.
 - Once there is an update, you would send it to Marmot. The records will update overnight in Pika.
 - The new update of records will be sent to EDS in about two days.

Discovery Partner Side Loading Information

- Any partner who have servers that Marmot host will have an easier time with side loading
- Getting the Marc files onto the Pika server takes more time for partners who do not have their servers hosted by Marmot.