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Instructions for adding MARC records to Gold Rush

This packet of information provides instructions on how to add and update your MARC records in the Gold Rush Library Content Comparison System. The first document, Upload Instructions includes guidelines and transfer requirements for sending your data through secure FTP. The second document, Item Data Profile Requirements, is optional and includes instruction for sending item-level holdings records and what data to include. An additional Excel spreadsheet worksheet accompanies these instructions and should be completed with branch, location and circulation data. You only need to complete the branch/location worksheets in the Excel document if you would like to have the system create facets for your branches and locations in the system.

- Gold Rush Upload Instructions
- Item Data Profiling Requirements (optional)
- Item Data Profiling Excel Worksheet (optional) (email attachment- separate Excel spreadsheet)

Most libraries start by manually doing a secure FTP deposit of MARC records the first time. However, once these have been successfully loaded, sites are encouraged to script or automate this process if you have the technical ability to do so and want your records to be automatically updated on a regular basis.

Ex Libris Alma

For libraries using the Ex Libris Alma system that would like to use Alma's Publishing Profile to automate regular uploading of MARC records to Gold Rush an entry is available in the developers Tech Blog.

https://developers.exlibrisgroup.com/blog/Using-a-Publishing-Profile-to-contribute-titles-to-the-Colorado-Alliance-of-Research-Libraries-Library-Content-Comparison-System

Innovative's Sierra System

Scheduler may be used to regularly update MARC records in Gold Rush. Contact the vendor for more information.

Other ILS Systems

Consult with the vendor or documentation of your system to schedule unattended MARC record exports.

Upload Instructions

Gold Rush Library Content Comparison System

Introduction

These are instructions for libraries to deposit records into the Gold Rush Library Content Comparison System. The system allows libraries to analyze their collections or compare their library holdings with other libraries that are already in the system for a wide variety of initiatives including shared print programs, weeding, storage facilities, individual or comparative collection analytics, etc. More information about the service, use cases and other information can be found at https://www.coalliance.org/faq-library-content-comparison-system.

Record Deposit Requirements

This is a secure FTP (SFTP) login which uses port 22. Once sites are ready to deposit their records a full export of a library's catalog should go into the **/UPLOADS/full** directory. When libraries want to refresh their record set just re-deposit your records in the "full directory" and the system will remove your older data set and replace it with the new records. At the present the system does not do "deletes" so the best way to get rid of records is to redeposit your full MARC record set again in the "full" directory.

In rare instances a library may want to add additional incremental records to an existing data set. In this case the files should go into the /UPLOADS/updates directory. By adding records to the "updates" directory your original records will be retained and the new records will be added. This does NOT allow for record overlays. If overlays are needed please redeposit your entire library record set in the "full" directory. Before adding records to the "updates" directory for the first time please contact us to make sure that this is the correct approach.

To upload records a library **must** tell us the outward facing public IP address of where the records will be coming from so that we can open a port in our firewall. **See https://whatsmyip.com if you want a quick way to find your IP address.**

SFTP address: horus.coalliance.org [You cannot access this SFTP site with your browser, use any SFTP client such as WinSCP]
Port: 22

Directory Structure
/UPLOADS/full
/UPLOADS/updates [Do not use this directory unless contacting the Alliance first]

A couple of guidelines to remember.

1. We need raw MARC21 records (MARC binary) which can be exported from most integrated library systems
2. Please put a .marc, .mrc, .out, or _new suffix on each file of MARC records being sent. We also accept files that have been compressed with *.tar, *.gz or *.zip formats as long as the compressed files have one of the aforementioned suffixes (.mrc, .marc, .out, or _new)
3. Make sure there are no spaces in the file name
4. If your local system divides large exports into multiple files, that's fine. Just deposit the multiple files in the appropriate directory and Gold Rush will merge them. We recommend not depositing more than 100 files to optimize the Gold Rush processing speed (the system will still process your records if more than 100 files are deposited but it just slows the indexing speed)

5. If your data set represents print materials (or physical items such as DVDs, CDs,) if you put “print” or “physical” in the file name the system will automatically tag them as such. If your data set is for electronic records if you put the word “electronic” or “ebook” in the file name the system will tag them as e-resources. If both print and electronic items are intermixed in the same file(s), that is fine, the system will go through each MARC record and determine if it is print or electronic. However, if you know this ahead of time and the print and electronic files are separate it is more accurate. Alma systems, for example, will separate print and electronic records into separate files with the word “print” and “electronic” already in the file names – just keep them that way.
6. If item records are included with branch, shelving location, and/or circ data; most sites put them in a 9XX tag in each MARC record. Do not put them in the 945^a tag since this is being used for another purpose in the system (however, other subfields in the 945 may be used for item-level data as long as the 945^a is not used). Ongoing functionality is being developed for item record analysis. It’s also OK not to include this information now if a library just wants to send the basic MARC record set to start.
7. If you cannot access our SFTP site please confirm the IP address of your device to make sure it is from the IP address(es) you have told us about
8. Most libraries include all records that may be used for comparisons including monographs, serials/journals, media, e-resources, gov docs, etc. However, it is up to each library to determine what records they want to contribute according to your local project requirements. If in doubt, contribute everything since facets are available in the system to narrow a data set to specific formats (e.g. monographs).
9. The system is re-indexed once a month (typically starting around the 6th) which allows new records to be ingested from participating libraries. If new facets or indexes are being added, this monthly indexing is required for their inclusion. If a library misses this indexing run the records will just be added in next month’s indexing run.

For general questions regarding the service contact: George Machovec (george@coalliance.org) or Rose Nelson (rose@coalliance.org). For technical questions related to the firewall access or SFTP login contact Steve Walker (steve@coalliance.org)

Item Data Profiling Requirements

Item-level holdings records contain the physical description of a particular item, including volume, copy number, shelving location and branch location. This MARC field needs to use the same subfields consistently. For example, shelving location information must always appear in the same subfield. The MARC tag may vary depending on your organization's local ILS. For example, many systems use a default MARC tag for exporting item data such as 989 (Sierra default), 946 (Alma default) and others allow you to select which field to use.

The 945^a field is reserved for system use so do not put item-level data in this field (however, other subfields in the 945 may be used for item-level data as long as the 945^a is not used).

If a library does not want to load item-level data and only wants to load MARC21 records, that is fine. You will still have full functionality in the system except that there will be no branch, shelving location, or circulation facets for your load. If your project does not require item-level data we recommend not loading that data as it will be easier for the library depositing records as well as us not having to code for this.

Data must be delivered in a consistent format with each of the following elements within a defined subfield. **Please use the separate Excel spreadsheet provided by Gold Rush staff for providing this data**. The information below is for explanation only.

Field	Description	Data format	Data Specs
Institution Name	Name of your institution	Alphanumeric. Example: **University of Denver**	Maximum 21 characters including spaces
Institution Abbreviation	Abbreviation most commonly used for your institution	Alphanumeric. Example: **DU**	Maximum 13 characters no spaces
Shelving location code (optional)	A code representing the physical location of the item.	Alphanumeric. Example: **HSCOL**	Minimum 1 character maximum 13 characters no spaces
Shelving location label (optional)	A text code or label that describes the physical location of the item.	Alphanumeric text string (i.e. label). Example: **Main Stacks**	
Branch code (optional)	A code representing the branch where item is located	Alphanumeric Example: **H**	Minimum 1 character maximum 13 no spaces
Branch label (optional)	A text label that describes where an item is located	Alphanumeric Example: **Hampden**	
Circulation count(optional)	Number of circs for this item	Numeric Example: **3**	Maximum 5 characters

Example

MARC field 949
y23714681160002766|s1|dHC210020325S|aSEE LIBRARIAN|kH|iU186023780140||lhscol|g1|c3|

$k=branch	$l=Location	Circulation count $c
kH	lhscol	3

Please email completed worksheets to goldrush@coalliance.org. This email will go to Rose Nelson, George Machovec and the technical folks at the Colorado Alliance of Research Libraries.