Specifications for the Monthly Z-Server Run  
(2007-04; minor revisions/corrections on 2008-01-08)

1. Each month select target records containing 996 subfield $c$ TSzserv. This field is the flag to identify minimal records or full records lacking important data.

2. Evaluate the selected records. **Exclude and report records that contain an OWN field for MiFliC (Flint) or MiU-H (Bentley).** Report the total extracted record count plus counts for each of the following conditions:
   a. Lack LC subject headings
   b. Lack a 020 / 022 / 028 field
   c. Lack a 300 field or has a 300 field containing the strings “p. cm.” or “p. ;$$c$ cm.”
   d. Contain LC subjects headings and a 300 field without “p. cm.” or “p. ;$$c$ cm.” (These records were manually flagged by catalogers for other types of corrections).
   e. Contain the TSzserv flag and subfield $n$ 1-18.

3. Extract the 020, 022, or 028 of each record. Choose the first field if there is more than one of that particular field.

4. Extract the 245 field (plus 1## field if present) of each record that lacks 020, 022, and 028 fields.

5. Use the Z-Server to search the 020 / 022 / 028 or the title plus author keywords in the LC catalog.

6. Evaluate retrieved records to determine if they are full records. For this process, full is defined as having all of the following:
   1. At least one LC subject heading (6## with second indicator 0)
   2. A 300 field that does not contain the strings “p. cm.” or “p. ;$$c$ cm.”
   3. **Encoding level (LDR/17) is blank (^), 1, 2, 4, I, or L.**
   4. A 040 that does not contain subfield $b$  
      Repeat the search in OCLC if the first search fails to locate a full record in LC.

7. Repeat the search in OCLC if the LC search fails to locate a full record.
8. Produce a score by checking for: *(we'll need to discuss the weights proposed here)*
   i. Number of LC subject fields (6## with second indicator 0) present in the record, 3 points for each
   ii. Number of added entries (7#0, 711, and 75#), 2 points each
   iii. Number of note fields (5##), 1 point each
   iv. Number of OCLC holding institutions, each listed in a 948 field, 2 points each

9. If a search of LC or OCLC retrieves 2 or more full records with the same highest score, load the records into MiU02 with the SysID of the minimal level record in a 035 with the prefix MiU01. Add subfield $l MiU02 plus the SysIDs to the 996 field of the minimal level record *(Or place the MiU02 SysIDs in the MAT field used for Serials Solutions multiple matches?)*. Report the number of records plus the minimal level records’ SysIDs for these multiple hits.

10. When a record is selected as a single best match for the minimal level record, compare the 245 subfield $a and subfield $h of the two records. If the subfield $h subfields differ or the full record contains $h but the minimal level record does not, do not overlay. Report the SysIDs of these minimal level records for evaluation. If the $h subfields are the same (or both lack $h subfields), compare the $a and $b subfields. Strip both subfield delimiters and compare the resulting strings. If the strings differ, move the minimal record’s 245 subfield $a to 2463^$a in the full record. Precede the 2463^$a with subfield $iOrder title:

11. Retain all 006, 007, 520, 533, 590, 856, and 998 fields in the minimal level record.

12. Exclude the 006, 007, 520, and 533 fields of the incoming full record.

13. For 856^4, 85640, and 85641, change all 856 subfields ($3, $u, and $z) to subfield $x in the incoming full record since those URLs may not be valid for UM. This will suppress the URLs from Mirlyn.

14. Delete all 85642 fields from the full records.

15. Convert 440^# and 4901^ fields in the full record to 4900^. When subfield $n and subfield $p are encountered in 440^0, move the contents of the field, including punctuation, to subfield $a.

16. Delete any 800^#0, 810^#0, 811^#0, or 830^#0 fields.
17. Overlay the minimal level record with the full record.

18. Delete the 996 field in the newly overlaid record. Add a new 998 with subfield $c overlay and the current date in YYYYMMDD format. Save the record at cat level 20.

19. Change the holdings record XPR date to the current date.

20. Submit all overlaid records to Backstage for MARS processing. It may be necessary to ignore or remove existing 997 fields in records that were prematurely saved at cat level 20.

21. Report the number of overlaid records with subtotals for the number of full records from LC and OCLC.
TSzserv Records Not Overlaid

1. Add subfield $n to the 996 field in records that fail to find any full records and set the value to 1. Example: 996__$_cTSzserv $n1

2. In records with existing subfield $n subfields, increment the subfield $n value by one.

3. Report the SysID, 245## subfield $a, 260 subfield $abc, Lang, and 852#$^ subfield $a, subfield $b, subfield $c, and subfield $h of records when the counter reaches 18.

4. When counters reach 18, produce a report of those Aleph SysIDs plus format (based on Aleph FMT or LDR/06), sublibrary/collection (852 subfield $b, subfield $c), call number (852 subfield $h/$$j), language (008/35-37), publication date (008/07-10), and data about the records origin from the first CAT field (subfields subfield $a and subfield $c). The first of these records should reach 18 searches sometime next fall. TS Section Heads will develop criteria to determine how best to review and/or enhance these records by that time.