**Electronic Resources Evaluation Between Vendor and OCLC KB**

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| **Resource Name:** | | | |
| **Final Evaluation:** | | | |
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| **Next Steps:** | | | |
|  | **Vendor** | **OCLC KB** | **Comments** |
| Is this a static or growing collection (i.e. will there only be updates or will new titles be added)? |  |  | Did the library purchase a static set of titles or is it a subscription where we will continue to get new titles over the years? |
| Are there MARC records available? |  |  | Some eresources don’t provide title level access. Sometimes it is only possible to get a certain percentage of the titles. Note down what records are available and if you can get the whole set. |
| Is it easy to find the MARC records? |  |  | Is it easy to find where these records are or is it buried on the vendor’s website? Do you have to log in to an administrative portal to find them? Do you have to fill out criteria to have a set delivered? |
| How do you acquire the set for the MARC records? |  |  | Note down where the records can be located. |
| Are the MARC records free? |  |  | Make sure that we don’t already pay for the MARC records, i.e. OCLC contract services. |
| Is there any supporting documentation on the MARC records? |  |  | Note down where or keep a copy of that |
| Is there an easily identifiable contact information for inquiries about the MARC records? |  |  | Note down the contact |
| Are there any records in Aleph that need to be considered beforehand? If yes, do you need to do any prep work to load this current set? |  |  | Was a set already loaded and needs to be updated or deleted? Are records being handled by 5C? |
| How many records are available from the vendor and OCLC KB? |  |  | Record that number for each |
| How many records should we have access to according to the vendor? |  | | Compare the number of records available with what we should have access to according to the vendor |
| What is the file format of the file for the set of records (xml, mrc, xsls)? |  |  |  |
| Do records meet minimal MARC quality? |  |  | Implement national and/or international metadata standards and best practices  Consistent use of library standards such as MARC21, RDA and/or other nationally or internationally recognized standards (CCO, Dublin Core, MODS, …)  Consistent use of controlled access points and authorized forms for names, subjects, or genre terms  Standards that promote interoperability  Implement provider neutral records  OCLC or Vendor number  Implement at least this information: Title, Author (if applicable), Correctly coded information (fixed fields and LDR), A subject heading, Publication information |
| Is there a known and recognizable data match point? |  |  | Is there an OCLC number or vendor number in the 001 and/or 035? |
| Are there urls? |  |  |  |
| Do records have 1 url to the resource or several? |  |  | Check to see if there are records for multisets, serials, different versions of the resource (link to PDF or txt). |
| Are the urls to the resource the same between the vendor and OCLC? |  |  | Compare the urls. Is one set out of sync with the other? |
| Do the urls lead to the resource? Are there incorrect urls? |  |  | Sample some of the urls. Do they lead to the resource? Are there any don’t work? |
| Are the title lists the same between the vendor and OCLC sets? |  |  | Compare the titles. Are there any discrepancies? |
| What is the level of difficulty to prepare the set to be loaded into the system? |  |  | Low, Medium, High, and Very High refer to the amount of time and effort is needed to prepare the file to be batch imported.  **Low**: Requires minimal difficulty. Can use tasks already created in MarcEdit. Regular updates can be scheduled. An example is eDuke’s Latin American Studies.  **Medium**: The set requires some cleanup and manipulation. An existing task in MarcEdit can be applied with a couple of added touch ups to the set. Regular updates can be scheduled. An example is Film Platform.  **High**: The set requires significant cleanup and prep. New tasks need to be created in MarcEdit to deal with the discrepancies. A script might have to be written to test urls. Regular updates can be scheduled and a clear procedure can be created. An example is O’Reilly Safari.  **Very High**: The set requires significant cleanup and manipulation. New tasks need to be created in MarcEdit. Scripts might have to be written to test the urls. The set also needs more manual intervention because of the high level of inconsistency and accuracy. The sets are irregular. An example is TRAIL. |