# Electronic Resources Evaluation

# For Batch Loading Bibliographic Metadata Sets

## **General Information**

|  |  |
| --- | --- |
| **Electronic Resource Name:** |  |
| **CORAL Reference Number:** |  |

## **Pre-processing Evaluation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Criteria | Response | Response Guide | Scoring | Score  (Max Score: 50) |
| Are there MARC records available? |  | Yes/No. | * Yes = 0 * No = 1 |  |
| Are the MARC records freely available? |  | Is there an additional fee for the records? Examples include NAXOS or records created by contract such as DWS. | * Yes = 0 * No = 1 |  |
| Is it easy to find the MARC records? |  | Yes/No. Easy here means it is possible to find the MARC records from the Vendor site by looking at the site menu or in Collection Manager. | * Yes = 0 * No = 1 |  |
| Is there a url where these MARC records are? |  | Yes/No. Yes is for Collection Manager and a Vendor URL. Any other method is no. | * Yes = 0 * No = 1 |  |
| How are the MARC records delivered? |  | Note down download from vendor, configure OCLC WorldShare, download from FTP, etc. | * OCLC WorldShare = 0 * OCLC FTP = 1 * Download from Vendor Site = 2 * Retrieve from Vendor via Email = 3 * No Delivery Available = 4 |  |
| What is the delivery format for the MARC records? |  | MARC21/UTF-8, MARC21/MARC8, MARC xml, etc. | * MARC21/UTF-8 = 0 * MARC21/MARC8 = 1 * MARC XML = 2 * All other formats = 3 |  |
| Is there support for these MARC records? |  | Yes/No. Support can be through a vendor contact or OCLC support for instance. | * Yes = 0 * No = 1 |  |
| Is there any supporting documentation on the MARC records? |  | Yes/No. Vendor page about the MARC records for instance. | * Yes = 0 * No = 1 |  |
| Is this a static collection or will updates be applied to the MARC records going forward? |  | Yes/No. A static collection will never change unlike a growing collection. | * Yes = 0 * No = 1 |  |
| Are the number of MARC records in the set comparable to what the libraries has access to? |  | Yes/No. Comparable means at least 90% and above of titles are in the bibliographic set. | * Yes = 0 * No = 1 |  |
| Is this number close to what is listed we have access to? |  | Yes/No | * Yes = 0 * No = 1 |  |
| Are there MARC records already in the library system? |  | Yes/No | * Yes = 1 * No = 0 |  |
| If yes, then is it necessary to delete the MARC records? |  | Yes/No (Overlay) | * Yes = 1 * No = 0 |  |
| Is there a recognizable match point in the MARC records? |  | Vendor number/OCLC number | * Yes = 0 * No = 1 |  |
| If there is a match point and an overlay is needed, do the match points between the records in the library system and MARC records match? |  | Yes/No. If it is not applicable score as 0. | * Yes = 0 * No = 1 |  |
| Are there urls? |  | Yes/No | * Yes = 0 * No = 1 |  |
| If there are urls, do they lead to the electronic resource? |  | Yes/No | * Yes = 0 * No = 1 |  |
| If there are urls, is it necessary to do any clean up? |  | Yes/No. Examples include multiple urls where one might be dead, there is the wrong subfield z information, or there are multiple urls per record. | * Yes = 1 * No = 0 |  |
| Do the records meet the minimal MARC quality [checklist](https://docs.google.com/document/d/1J8A_FOCebUPjWNrQy7MSvNUgi0v1KsyGXG_IB6MDGAo/edit)? |  | Yes/No. This includes best practices and national standards being followed. Partially means 1-3 elements below are missing. No means all elements are missing. | * Yes = 0 * Partially = 5 * No = 10 |  |
|  | Standard number Present? | * Yes = 0 * No = 1 |  |
|  | English as the Language of Cataloging? | * Yes = 0 * No = 1 |  |
|  | RDA as Descriptive Cataloging Standard? Mix code as No. | * Yes = 0 * No = 1 |  |
|  | Author if applicable? | * Yes = 0 * No = 1 |  |
|  | Subjects (LC) Present? | * Yes = 0 * No = 1 |  |
|  | Description Information (such as Extent) Present? | * Yes = 0 * No = 1 |  |
|  | Publication Information Present? | * Yes = 0 * No = 1 |  |
|  | Title Present? | * Yes = 0 * No = 1 |  |
|  | LDR Present and correct? | * Yes = 0 * No = 1 |  |
|  | URLs work? | * Yes = 0 * No = 4 |  |
| Are the MARC records one consistent record types? |  | Yes/No. Example are NAXOS which is only streaming audio or Safari which is streaming audio/streaming video/ebooks | * Yes = 0 * No = 1 |  |
| Are the resources linked to consistent file types? |  | Yes/No. Example are TRAIL where file types are txt, pdf, and html or Film Platform which is mp4. | * Yes = 0 * No = 1 |  |
| Is it necessary to create a new MarcEdit task? |  | Yes/No | * Yes = 1 * No = 0 |  |
| Total: | | | |  |

## **Initial Load Evaluation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Criteria | Response | Response Guide | Scoring | Score  (Max Score: 10) |
| Does a new collection and load code need to be created? |  | Yes/No. | * Yes = 1 * No = 0 |  |
| Does new documentation need to be created? |  | Yes/No. | * Yes = 1 * No = 0 |  |
| Does the Record Loading shared network drive need to be set up for these MARC records? |  | Yes/No. | * Yes = 1 * No = 0 |  |
| Are Aleph records being overlaid? |  | Yes/No | * Yes = 1 * No = 0 |  |
| Do Aleph records need to be deleted? |  | Yes/No | * Yes = 1 * No = 0 |  |
| Do the MARC records have to be loaded at off hours? |  | Yes/No. Off hours means between after 8pm and before 4am. | * Yes = 1 * No = 0 |  |
| Can the MARC records be loaded? |  | Yes/No | * Yes = 0 * No = 4 |  |
| Total: | | | |  |

## **Post Initial Load Evaluation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Criteria | Response | Response Guide | Scoring | Score  (Max Score: 40) |
| Do MARC records have to be loaded on a recurring schedule after the initial load? |  | Yes/No. If unknown, select yes to indicate research. | * Yes = 1 * No = 0 |  |
|  |  | Monthly | 4 |  |
|  |  | Quarterly | 3 |
|  |  | Biannually | 2 |
|  |  | Annual | 1 |
|  |  | Infrequent | 5 |
|  |  | Unknown | 6 |
| Do MARC records have to be deleted on a recurring schedule? |  | Yes/No. If unknown, select yes to indicate research. | * Yes = 1 * No = 0 |  |
|  |  | Monthly | 4 |  |
|  |  | Quarterly | 3 |
|  |  | Biannually | 2 |
|  |  | Annual | 1 |
|  |  | Infrequent | 5 |
|  |  | Unknown | 6 |
| Do MARC records have to be merged on a recurring schedule? |  | Yes/No. If unknown, select yes to indicate research. | * Yes = 1 * No = 0 |  |
|  |  | Monthly | 4 |  |
|  |  | Quarterly | 3 |
|  |  | Biannually | 2 |
|  |  | Annual | 1 |
|  |  | Infrequent | 5 |
|  |  | Unknown | 6 |
| Not applicable as MARC records cannot be loaded. (See comments) |  | Assign highest number for previous responses as all is unknown and 9 if MARC records cannot be loaded. If records can be loaded, assign 0. | 19 |  |
| Total: | | | |  |

## Total Score:

|  |  |  |
| --- | --- | --- |
| Evaluation Stage | Score | Out of Max Score |
| Pre-processing evaluation |  | 36 |
| Initial load evaluation |  | 6 |
| Post initial load evaluation |  | 21 |

## Total Time to Score & Evaluate (Minutes):

|  |  |
| --- | --- |
| Evaluation Stage | Time Taken or Estimated Time for task |
| Pre-processing evaluation |  |
| Initial load evaluation |  |
| Post initial load evaluation |  |

## Comments:

|  |  |
| --- | --- |
| Evaluation Stage | Comments |
| Pre-processing evaluation |  |
| Initial load evaluation |  |
| Post initial load evaluation |  |