# Electronic Resources Evaluation

# For Batch Loading Bibliographic Metadata Sets

## **General Information**

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

## **Pre-processing Evaluation**

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| --- | --- | --- | --- | --- |
| 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 title level access preferred? |  | Yes/No. In communication with DRMS, determine preferred level of access. If preferred level of access can be achieved through data integration steps, then records don’t need to be loaded. Here, Yes means records in the library system are preferred. No means that they are not. | Yes = 0  No = 50 |  |
| 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 * Unknown = 2 |  |
| 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/Updated/No. | * Yes = 2 * Updated = 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 Aleph records need to be deleted at off hours or at a particular time? |  | Yes/No. Off hours means between 8pm and before 4am. At a particular time means when users are less likely to be looking for these materials or not during high traffic times. | * 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**

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| --- | --- | --- | --- | --- |
| 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 |  | 50 |
| Initial load evaluation |  | 10 |
| Post initial load evaluation |  | 40 |

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

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

## Comments:

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