Kent State University E-Book Checklist Handout: Description and Questions

Description of purpose: This document is used to track decision-making for the treatment of batch-loaded bibliographic records once a decision has already been made to load individual title records into KentLINK for eresources. The catalog records and intranet documentation are populated based on the decisions recorded here. Individual bibliographic records for e-books/e-resources are generally loaded in the Serials Department. When a deal is under consideration, Serials staff will negotiate with the vendor regarding availability of MARC records. If MARC records are available, Serials staff will share them with Cataloging when they notify Cataloging that a deal is in process. Cataloging reviews the records. Once Cataloging is notified that the deal is finalized they will contact the vendor regarding their willingness to make batch modifications.

Questions/Decision points

Title:

- 1. Estimated number of records
- 2. Updates? (Y/N). Frequency estimate?
- 3. Who is the staff member preparing records for batch load?
- 4. How will we load the records? (Loaders, Connexion)
- 5. Are loader changes needed? (Y/N)
- 6. Loader to be used.
- 7. Who is responsible for vetting record quality?
- 8. Who is vendor contact for bibliographic records?
- 9. Availability / source and cost of MARC records.
- 10. Will the vendor supply modifications? (Y/N)
- 11. If yes, list requested record modification details.
- 12. Are OCLC Records available with OCLC #s in the 001? (Y/N)
- 13. Will we set OCLC Holdings? (Y/N)
- 14. For non-OCLC 001s, what enumeration do we use?
- 15. Non-OCLC Prefix that will be used: (Register with OhioLINK)
- 16. Will we display records locally? (Y/N)
- 17. Will we contribute to the OhioLINK Central Catalog? (Y/N)
- 18. Will we send these records out for authority control? (Y/N) (If no, skip to #23)
- 19. If the answer to #18 is yes, will the records be sent out as a separate project or with regular authorities processing? (Separate/Regular)
- 20. If records are sent separately, what date will the records be sent out?
- 21. What are the costs associated with authority control (if any)?
- 22. If authority control is not outsourced, will we provide in-house authority control? (Y/N)
 - a. If Yes, notify Database maintenance librarian to clear heading reports and immediately before loading turn on the heading report "Headings used for the first time."
 - b. Regardless of whether or not we provide in-house authority control, remember to load the records without a CATDATE to indicate some cataloging (in this case, authority control) is lacking.
- 23. Does the Mat Type code need to be changed to "3"? (Y/N)
- 24. Does a location code need to be set? (Y/N) If yes, specify.
- 25. Does the 006 field at least have a "m" in the first position (computer file) and a "d" in the third position (text)? (Y/N) Do we add field? (Y/N)
- 26. Does the 007 field at least have a "c" in the first position (electronic resource) and an "r" in the second position (remote)? (Y/N) Do we add field? (Y/N)
- 27. Is a classification number present? (Y/N) Do we add field? (Y/N)
- 28. If yes (to #27) please provide classification scheme.

- 29. If no (to #27), can the vendor provide? (Y/N)
- 30. Is the GMD "\$h [electronic resource]" present in the 245? (Y/N) Do we add field? (Y/N)
- 31. Does the physical description field at least contain "300 \$a 1 online resource"? (Y/N) Do we add field? (Y/N)
- 32. Are local restrictions needed in 506? (Y/N) Do we add field? (Y/N) If yes, describe.
- 33. Are these resources only available to Kent State (not OhioLINK)? (Y/N) Note URL-Specific Information such as:
 - a. Tag to use
 - b. Indicator values
 - c. Contents of public note (\$z)
- 34. Which MARC tag should be used locally for collocation (hook)? Note collocation field contents.
- 35. Do order records need to be generated using 98X fields to link records back to a master record? (Y/N) If Yes, describe
 - a. Field to use
 - b. Subfield(s) and value(s)
- 36. Who has responsibility for developing and maintaining update schedules for this project (adds/deletes/changes)? Provide
 - a. Date of batchload
 - b. Bibliographic record numbers (Start/End)
 - c. Date of update(s)
 - d. Bibliographic record numbers (Start/End)
- 37. Are any special fields required for public services? (Y/N) If Yes, describe.
- 38. Comments/issues/suggestions for next batch load.

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