

Tracking E-Resource Record Loads

Prepared by Adam Baron, University of North Texas

adam.baron@unt.edu

Adding Record Loads

New Records

- A. Collection Name:** Use the form of name found in the local collection field to identify the collection.
- B. Subcollection:** Provides a unique way to identify the load. Varies based on collection, but can include:
 - A publisher/vendor named subcollection, such as a subject collection part of a larger package.
 - The month and year for record sets with monthly updates.
 - A cataloger supplied subcollection name.
- C. Number of Records:** Number of records included in the load.
- D. Number of Records Loaded:** The number of records loaded into ILS. If this number differs from the Number of Records in column C, consider including a brief note to account for the difference.
- E. Date Loaded:** The date the records were loaded into ILS.
- F. Loaded by:** Enter your first name only to show you were responsible for the record load.
- G. Bib Record Start:** Copy the starting bib record number from the record loading statistics *immediately* after loading.
- H. Bib Record End:** Copy the ending bib record number from the record loading statistics *immediately* after loading.
- I. File Name Before Editing:** Copy and paste the name of the original file. This will usually be the name supplied by the publisher/vendor.
- J. Notes:** Include any relevant notes that are particular to that load. Consider adding longer notes to the procedure for that package/collection.

Overlaid Records

- A. Collection Name:** Use the form of name found in the local collection field to identify the collection.
- B. Subcollection:** Provides a unique way to identify the overlay. Varies based on collection, but can include:
 - A publisher/vendor named subcollection, such as a subject collection part of a larger package.
 - The month and year for record sets with monthly updates.
 - A cataloger supplied subcollection name.
- C. Number of Records:** Number of records included in the overlay.
- D. Number of Records Overlaid:** The number of records overlaid in ILS. If this number differs from the Number of Records in column C, consider including a brief note to account for the difference.
- E. Date Overlaid:** The date the records were overlaid in ILS.
- F. Overlaid by:** Enter your first name only to show you were responsible for the overlay.
- G. New/Update:** Use "New" if you overlaid a minimal record; use "Update" if you overlaid an existing full record.
- H. File Name Before Editing:** Copy and paste the name of the original file. This will usually be the name supplied by the publisher/vendor.
- I. Notes:** Include any relevant notes that are particular to that overlay. Consider adding longer notes to the procedure for that package/collection.

Withdrawn Records

- A. Collection Name:** Use the form of name found in the local collection field to identify the collection.
- B. Subcollection:** Provides a unique way to identify the withdrawal. Varies based on collection, but can include:
 - A publisher/vendor named subcollection, such as a subject collection part of a larger package.
 - The month and year for record sets with monthly updates.
 - A cataloger supplied subcollection name.
- C. Number of Records:** Number of records included in the withdrawal.
- D. Number of Records Overlaid:** The number of records withdrawn from ILS. If this number differs from the Number of Records in column C, consider including a brief note to account for the difference.
- E. Date Withdrawn:** The date the records were withdrawn from ILS.
- F. Withdrawn by:** Enter your first name only to show you were responsible for the withdrawal.
- G. File Name Before Editing:** If applicable, copy and paste the name of the original file. This will usually be the name supplied by the publisher/vendor.
- H. Notes:** Include any relevant notes that are particular to that withdrawal. Consider adding longer notes to the procedure for that package/collection.

Joined MARC Files

When smaller subcollection files are joined together to create a larger file for editing and loading, when possible, include the following:

- For each subcollection file:
 - Collection Name
 - Subcollection
 - Number of Records
 - File Name Before Editing
 - The note “Included in [file name of the joined MARC file]”

- Highlight the row in gray (White, Background 1, Darker 25%).
- For the joined MARC file:
 - Collection Name
 - Subcollection: A name supplied by the cataloger that closely matches the file name.
 - Number of Records: The total number of records in the joined file.
 - File Name Before Editing: Supplied by the cataloger for the joined MARC file.
 - Include other information as usual.

Split MARC Files

When larger files are split into several smaller files for editing and loading, when possible, include the following:

- For the large file:
 - Collection Name
 - Subcollection
 - Number of Records
 - File Name Before Editing
 - Highlight the row in tan (Tan, Background 2, Darker 50%).
- For each smaller file:
 - Collection Name
 - Subcollection: A name supplied by the cataloger that closely matches the file name.
 - Number of Records
 - File Name Before Editing: Supplied by the cataloger.
 - Include other information as usual.

Colors

To make it easier to read the spreadsheet, highlight rows as follows:

The load, overlay, or withdrawal is Complete . <i>(Olive Green, Accent 3, Lighter 40%)</i>
The load, overlay, or withdrawal is In progress . <i>(Red, Accent 2, Lighter 40%)</i>
A subcollection file that has been joined into a larger file for editing and loading. <i>(White, Background 1, Darker 25%)</i>
A larger file that has been split into smaller files for editing and loading. <i>(Tan, Background 2, Darker 50%)</i>

Adding to the Calendar

- Collection Name:** Use the form of name found in the local collection field to identify the collection.
- Subcollection:** If applicable, provide a unique way to identify the load. Varies based on collection, but can include:
 - A publisher/vendor named subcollection, such as a subject collection part of a larger package.
 - The year for frontlist or backlist collections.
 - A cataloger supplied subcollection name.
- Frequency of Updates:** How often new or updated records will be added to ILS (e.g., Daily, Weekly, Monthly, Quarterly, etc.). The frequency of updates may differ from how often the publisher/vendor provides updates.
- Next Update:** If applicable, provide a way to identify the next update. For frontlist collections with monthly updates, this can be the month and year that is consistent with how the publisher/vendor identifies their updates. If no more updates are expected, mark as “Complete”.
- Date to Check for Updates:** Always include a date to check for updates, except if the collection/subcollection is complete and no more updates are expected. This will usually correspond to the date of the next expected update.
- Date Last Checked for Updates:** Always include a date when updates were last checked, even if there were no updates available.
- Updates Loaded by:** Enter your first name only to show you were responsible for the updates.
- Source of Updates:** Include brief information about the source of the updates, such as a URL. Detailed instructions for how to obtain update files should be included in the procedure for the package/collection.
- Notes:** Include any relevant notes that are important when checking for updates, such as login information or more specific information regarding the frequency of updates (e.g., the months when quarterly updates are posted).

