

# Managing Electronic Resource Collections and Batch Loads



**Susan DiRenzo Ashby**  
Associate Professor / Coordinator, Library Systems  
OH-IUG  
State Library of Ohio, Columbus OH  
10/12/2018



# About The University of Akron Libraries

- University Libraries (UL) \*
  - Bierce Library
  - Science & Technology Library
  - Archival Services
- Law Library \*
- Wayne College Library \*
- Center for the History of Psychology
  - Archives of the History of American Psychology (AHAP)
- OhioLINK member library

\* Loads electronic resource records



# About UL Electronic Services

## Administration

Head, Electronic Services

## Acquisitions

Interim Coordinator, Acquisitions (also Electronic Resources Librarian)

2 Library Specialists

Library Service Coordinator (Discovery Services)

## Cataloging

Coordinator, Cataloging Services

Music/Special Materials Cataloger

2 Cataloging Specialists

## Collection Management

Collections and Content Strategies Librarian

## Electronic Resources

Electronic Resources Librarian (also Interim Coordinator, Acquisitions)

2 Library Specialists

## Library Systems

Coordinator, Library Systems

Departmental Systems Admin

## Web Services

Web Developer

# About UL e-collections

- 55 total UL E-collections
  - 25 local
  - 27 consortial (OhioLINK)
  - 3 other (EBSCO A-Z , YBP DDA purchased & YBP ebook)
- 19 collections updated monthly or as new/updated records are made available
- Generally licensed for all UA libraries
- Cost (if any) for MARC records paid from materials budget



# Common issues with managing batch loads

- Record quality/source
- Selecting best source
- Customizations
- Bad data, missing indicators and subfields
- Inconsistent methods of update notifications and retrieval options
- Loading statistics
- Deletions and updates
- Vendor neutral records/multiple sources for same resource
- Who to call for support?

# A brief history of batch loading at UL

- Batch loading started early 2000s
- Original Documentation
  - A single MS Word document for loading all e-collections ([The Blob](#))
  - Included frequency of updates, method of file retrieval, loading instructions, and local edits
- Files loaded by Library Systems Coordinator and library systems assistant
- Local records evaluated by a willing cataloger and edited by Library Systems
- Consortial (OhioLINK) records not reviewed
- “Moved” to cataloging when Library Systems Coordinator also served as Interim Head of Cataloging
- “Moved back” to library systems and stayed there until 2012 UL reorganization



# The need for a new model

- To distribute loading responsibilities
- To develop user-friendly and easy to maintain loading instructions
- To design clear and efficient workflows
- To ensure quality and accuracy in individual MARC records
- To standardize MARC record customizations
- To improve communication and information sharing



# KSU checklist

## Page 1

**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 ebooks. The catalog records and intranet documentation are populated based on the decisions recorded here. Individual bibliographic records for ebooks are generally loaded in the Serials Department. When a deal is under consideration, Serials staff will negotiate with the vendor regarding the availability. If records are available, Serials staff will share them with Cataloging when they notify them that a deal is under consideration. 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.

TITLE: \_\_\_\_\_

1. Estimated number of record(s): \_\_\_\_\_

2. Updates?  Yes  No If yes, estimated Frequency/Size: \_\_\_\_\_

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?  Yes  No

6. Loader to be used: \_\_\_\_\_

7. Who is responsible for vetting record quality? \_\_\_\_\_

8. Vendor contact for bibliographic records: \_\_\_\_\_

9. Availability / source and cost of MARC records:

10. Will the vendor supply modifications?  Yes  No

11. If yes, list requested record modification details:

12. Are OCLC Records available with OCLC #s in the 001?  Yes  No





# KSU checklist

## Page 2

13. Will we set OCLC Holdings?  Yes  No
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 locally?  Yes  No
17. Will we contribute to the OhioLINK Central Catalog?  Yes  No
18. Will we send these records out for authority control?  Yes  No (If no, skip to 23)
19. If the answer to question 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?  Yes  No
- 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."
  - 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"?  Yes  No
24. Does a location code need to be set?  Yes  No 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)?  
 Yes  No Add field: \_\_\_\_\_
26. Does the 007 field at least have a "c" in the first position (electronic resource) and an "r" in the second position (remote)?  
 Yes  No Add Field: \_\_\_\_\_



# KSU checklist

## Page 3

27. Is a classification number present? \_\_\_\_\_ Yes \_\_\_\_\_ No Add Field: \_\_\_\_\_
28. If yes, please provide classification scheme: \_\_\_\_\_
29. If no, can the vendor provide? \_\_\_\_\_ Yes \_\_\_\_\_ No
30. Is the GMD "\$h [electronic resource]" present in the 245? \_\_\_\_\_ Yes \_\_\_\_\_ No Add Field: \_\_\_\_\_
31. Does the physical description field at least contain:
- 300 \$a 1 online resource \_\_\_\_\_ Yes \_\_\_\_\_ No
- Add field: 300 \$a \_\_\_\_\_
32. Are local restrictions needed in 506? \_\_\_\_\_ Yes \_\_\_\_\_ No
- Add field: 506 \$a \_\_\_\_\_
33. Are these resources only available to Kent State (not OhioLINK)? \_\_\_\_\_ Yes \_\_\_\_\_ No
- Add URL-Specific Information:*
- Tag to use:
- Indicator values:
- Contents of public note (\$z):
34. Which MARC tag should be used locally for collocation? \_\_\_\_\_
- Collocation Field Contents: \_\_\_\_\_
35. Do order records need to be generated using 98X fields to link records back to a collection level record? \_\_\_\_\_ Yes \_\_\_\_\_ No
- Field: \_\_\_\_\_
- Subfield(s) & Value(s) \_\_\_\_\_



# KSU checklist

## Page 4

36. Who has responsibility for developing and maintaining update schedules for this project (adds/deletes/changes)? \_\_\_\_\_

Date of batch load: \_\_\_\_\_

Bibliographic Record #s: Start: \_\_\_\_\_

End: \_\_\_\_\_

Date of updates: \_\_\_\_\_

Bibliographic Record #s: Start: \_\_\_\_\_

End: \_\_\_\_\_

37. Are any special fields required for public services?

38. Comments/suggestions for next batch load:



# UA Loading guide 1.0

- Specifics of modifications to records (001, 856, etc.)
- Load table to use
- Holdings to be set or contributed to OhioLINK
- Other notes such as alternative sources for records that were considered, issues encountered, possible changes to procedures, etc.
- Dropdowns and fill-ins for each item



# UA Loading guide 1.0 continued

- Did not include loading instructions
- Based on checklist developed and used by KSU
- Covered basic details for managing batch loads
- Type of collection (local or consortial, one-time or ongoing)
- Frequency of updates and method of notification and retrieval
- Included Managing, Vetting, and Loading responsibilities

# Loading Guide Purpose Statement

- **Purpose:** This document is designed to track decisions made about the treatment of sets of bibliographic records which are batch-loaded into our local catalog. These are chiefly for e-resources. It is a working document and should be updated as changes are made to how batches of bibliographic records are processed. A separate log will be maintained to track the processing of individual batches.

# Loading Guide Purpose Statement continued

- The **manager** is responsible for ensuring that all appropriate decisions have been made regarding the acquisition and processing of bibliographic records for the specific collection, and for documenting them on this form. A cataloger will be responsible for **vetting** the bibliographic records before or as part of the first load; additional vetting at a later time can be requested by the manager or the loader. The **loader** is responsible for acquiring and processing batches of bibliographic records for the collection; this will include retrieval, editing, and loading of bibliographic records.

# Loading Guide Purpose Statement continued

- For ongoing resources, the manager is responsible for determining the availability of additional bibliographic records unless a subscription has been established. When a subscription is in place, the loader is responsible for determining the availability of additional bibliographic records.





# Loading guide 1.0

Included a purpose and explanation of the assigned responsibilities.

## University Libraries E-Resource MARC Record Set Checklist Form

[file:///H:/eServices/Record loads/](file:///H:/eServices/Record%20loads/)

**Purpose:** This document is designed to track decisions made about the treatment of sets of bibliographic records which are batch-loaded into our local catalog. These are chiefly for e-resources. It is a working document and should be updated as changes are made to how batches of bibliographic records are processed. A separate log will be maintained to track the processing of individual batches. The **manager** is responsible for ensuring that all appropriate decisions have been made regarding the acquisition and processing of bibliographic records for the specific collection, and for documenting them on this form. A cataloger will be responsible for **vetting** the bibliographic records before or as part of the first load; additional vetting at a later time can be requested by the manager or the loader. The **loader** is responsible for acquiring and processing batches of bibliographic records for the collection; this will include retrieval, editing, and loading of bibliographic records.

For ongoing resources, the manager is responsible for determining the availability of additional bibliographic records unless a subscription has been established. When a subscription is in place, the loader is responsible for determining the availability of additional bibliographic records.



# Loading guide 1.0

## Checklist

**Red text** is supplied by drop-downs or typed into blanks

Loading Instructions in separate document

COLLECTION TITLE: **YBP eBook (1030-50)** -- Date: **February 25, 2015** -- Revised: Enter date

1. Is this locally purchased or OhioLINK resource? **Local Resource**
2. Estimated number of records (one time load): **N/A**
3. Will updates be made available or is this one-time load? **Updates**  
Frequency of updates: **other** Other: **As titles are purchased**
4. Notification method: **e-mail**
5. Retrieval method: **ftp**
6. Who will be managing this set: **Susan Ashby**
7. Who will be loading these records: **Pat Cesare**
8. Who is responsible for vetting record quality: **Karen Plummer**
9. Availability / source: **YBP** and cost of MARC records: **See YBP Technical Services agreement**  
Vendor contact for bibliographic records (**February 25, 2015**):  
**Chris Fleischer cfleischer@ybp.com**
10. Will the vendor supply modifications? **Yes** Cost: **See YBP Technical Services agreement**
11. Record modification details:
  - a. Does the 001 contain an OCLC number: **No**
  - b. If no, what is the non-OCLC Prefix to be used (see: <https://platinum.ohiolink.edu/dms/DM5docs/ercat-nonohiolink.htm#table1>):  
Vendor prefix/suffix: **ybp** -- OhioLINK prefix: **N/A**
  - c. **[Vendor]** : Bib location Choose an item. (Specify in *additional modifications* below)
  - d. Will records be contributed to the OhioLINK Central Catalog? **No**
  - e. **[Vendor]** : Is the Proxy required **Yes** - **\$uhttp://ezproxy.uakron.edu:2048/login?url=**
  - f. **[Vendor]** : URL specific info to be used: Tag: **856 40** -- Public Note (**\$z**): **\$zConnect to title online (UA network users only)**
  - g. **Vendor/Local** : Collocation info to be used: Tag: Enter text. Collection field contents: Enter text.
  - h. Additional vendor-supplied modifications:  
**049 \$azzebb**  
**099 \$aElectronic\$Book**
  - i. Additional local modifications:  
**N/A**
12. Load table to use: **ybpbooks (Import Invoices)**
13. Will OCLC Holdings be set? **No**
14. Other MARC sources considered:  
**N/A**
15. Special instructions:  
**E-mail notifications should be sent to loving@uakron.edu**
16. Notes or other comments:

# Loading guide 2.0

The second section gives a step-by-step walkthrough of retrieving files, making edits, and loading.

## Load instructions and local record modification details:

**001:** fod  
**Loaded by:** Monaco  
**Frequency:** Monthly as available  
 Check FOD admin site for updates; they run 4-6 months behind; also issue semiannual delete files.  
**Load Table:** localeresource  
**Source:** <http://admin.films.com> [Requires username and password]

1. Retrieve records
  - a. Go to Films on Demand website: <http://admin.films.com/AdminLogin.aspx> and log in
  - b. Select 'Title Data' tab
  - c. Click on 'MARC Records' tab
  - d. Go to end of file for most current MARC record files. Select the appropriate **MARC\_19207\_MMYM.mrc** file and **CLICK** download
  - e. Save download file to H:\eServices\Record loads\record loads - archives\non-OhioLNK loads\Films on Demand\FY XX-XX
2. In MarcEdit,
  - a. Open MARC Tools
    - i. Input File box: Click the folder then navigate to H:\eServices\Record loads\record loads - archives\non-OhioLNK loads\Films on Demand\FY XX-XX.mrc
    - ii. Output File box: Click the folder then navigate to H:\eServices\Record loads\record loads - archives\non-OhioLNK loads\Films on Demand\FY XX-XX\ . Save file using file name **MARC\_19207\_MMYM.mrk**.
    - iii. Functions menu: Select **MarcBreaker**
    - iv. Click **Execute** button
    - v. Once .mrk file has been created, click the **Edit Records** button which will open file in the editing window
  - b. Preload Edits using MarcEdit
    - i. Replace =001 with =001 fod – Note number of records that were affected by the replace. This is the total number of records in the file.
    - ii. Insert **099 \\\\$aStreaming\$aVideo**
    - iii. Check genre/form headings. NOTE: As of 8/21/2015, they are including \$2lgft, but still do not have the correct second indicator. Please double check. FOD should include:
      1. =655 \7\$aEducational films.\$2lgft
      2. =655 \7\$aInternet videos.\$2lgft
      3. =655 \7\$aNonfiction films.\$2lgft
    - iv. Add **793 \$a: 0\ \$aFilms on Demand**
    - v. Change 856 \$z: \$zPart of the Films on Demand collection to \$zConnect to title online (UA network users only)
    - vi. Insert **949 \\\\$a\*ins=xxx;ov=;bn=zzsvb; b3=zj** – Change xxx to your initials
    - vii. Save file and spot check to make certain edits were consistent
    - viii. Go to **File -> Compile File into MARC**
      1. Save file to H:\eServices\Record loads\record loads - archives\non-OhioLNK loads\Films on Demand\FY XX-XX\ **MARC\_19207\_MMYM.edit.mrc**; the 'edit' in the file name will distinguish between the raw FOD file and the edited version of the file
3. In Sierra, go to Data Exchange
  - a. In the Select Process box, select **Load Records via Local Profiles (local)**
  - b. Click on **Get PC**.
  - c. Navigate to H:\eServices\Record loads\record loads - archives\non-OhioLNK loads\Films on Demand\FY XX-XX\ **MARC\_19207\_MMYM.mrc**, click on **Upload**
  - d. In Rename File box, select suffix **.lfts**  
Click on **OK**
  - e. Highlight file to be converted, click on **Prep P** (hold the cursor over **Prep P** to see the **Preprocess records loaded via FTS** message)

# Loading guide 2.0

First section gives overview of collection, responsibilities, and historical notes.

Essentially the same as the 1.0 guide

COLLECTION TITLE: **Films on Demand** -- Date: **August 24, 2015** -- Revised: **May 18, 2016**

1. Is this locally purchased or OhioLINK resource? **Local Resource**
2. Estimated number of records (one time load): **N/A**
3. Will updates be made available or is this one-time load? **Updates**
  - a. Frequency of updates: **monthly** Other: **Runs about six months behind (e.g., July 2015 they released Jan 2015 records. Also issue biannual delete files. Occasionally issue backlog files of multiple months' records (e.g., Sept. 11, 2015, released file with April-July 2015 records).**
4. Notification method: **Check website**
5. Retrieval method: **Download .mrc file**
6. Who will be managing this set: **Mike Monaco**
7. Who will be loading these records: **Mike Monaco**
8. Who is responsible for vetting record quality: **Mike Monaco**
9. Other responsible individuals? Enter name and responsibility.
10. Availability / source: **Films on Demand** and cost of MARC records: **\$0.00**  
Vendor contact for bibliographic records (Enter date):  
Enter text.
11. Does the 001 contain an OCLC number: **No**
12. If no, what is the non-OCLC Prefix to be used (see <https://platinum.ohiolink.edu/dms/DMSdocs/ercat-nonohiolink.htm#table>):  
Vendor prefix/suffix: **fod** -- OhioLINK prefix: Enter OhioLINK prefix
13. Bib location **zzdvb (streaming video)** (Specify in *additional modifications* below) -- **zzsvb** (dropdown menu incorrect)
14. Will records be contributed to the OhioLINK Central Catalog? **No**
15. Is the Proxy required **Yes** - \$u<http://ezproxy.uakron.edu:2048/login?url=>
16. URL specific info to be used: Tag: **856 40** -- Public Note (\$z): **\$zConnect to title online (UA network users only)**
17. Collocation info to be used: Tag: **793 0** \ Collection field contents: **Films on Demand**
18. Will the vendor supply modifications? **Yes** Cost: **\$0.00**

**Limited modifications can be requested through dashboard**

19. Vendor Record modification details:

Adds proxy prefix.

20. Will OCLC Holdings be set? **No**
21. Other MARC sources considered:  
Click here to enter text.
22. Special instructions:  
Click here to enter text.



# Loading guide 2.0

The second section also gives instructions for recording statistics

Finally, the local edits are summarized for reference.

- j. In the load record window, click on **Load**. The number of records should match previous number of record input.
- k. **Create list in Sierra**
  - a. Go to create lists
  - b. Identify an appropriately sized empty list
  - c. Click on 'Copy' button
  - d. Select desired file(s) to copy from. There may be two: one for 'insert' and one for 'overlay'
  - e. Open list(s) and spot check records for errors
4. **Gather Statistics**
  - a. Return to Data Exchange
  - b. Go to **File->Select Printer->Standard Printer->Local**, click OK, and then choose "Adobe PDF."
  - c. When you hit the **print icon** from the loads stats screen, it will prompt you to where you want to save your PDF.
  - d. Save as **MARC\_19207\_MMY**, in: H:\eservices\Record Loads\record loads-stats\non-OhioLINK\Films on Demand
  - e. Also record statistics in the appropriate folder found in H:\eServices\Statistics\Dept-Stats\DeptStats\_XXXX-XXXX\LoadStats
5. In Sierra Data Exchange, click **Close**

**All local edits:**

```
001 add fod - MarcEdit
099 |aStreaming|aVideo - MarcEdit
655 Edit/add 3 genre/form headings - MarcEdit
793 Added title - MarcEdit
856 |z Connect to title online (UA network users only) - MarcEdit
949 \\$a*recs=b;jns=xxx;ov=;bn=zzsvb;b3=z; -- MarcEdit
```

# Kanopy Loading Guide

- [Kanopy Loading Guide](#)

# Other Tools used to manage e-resource collections

- Collection Assignment Spreadsheet
- Electronic Resource Batch Loaders (ERBL)
- Other Local Documentation
- SharePoint

# Collection Assignments spreadsheet

	A	B	C	D	E	F	G	H
	MARC Records Collections for locally owned resources							
	Collection	Record Provider	Vetted by	Managed by	Loaded by	One time load or updates	Combined form status and date	Outstanding issues or actions
1	17th-18th Century Burney Collection Newspapers		Mike	TBD	Systems	One time		
2	Congressional Hearings Digital Collection A & B	Proquest	David	Susan	Systems	One time (as collections are purchased)		
3	Congressional Research Digital Collection A & B	Proquest	David	Susan	Systems	One time (as collections are purchased)		
4	Congressional Record Permanent Digital Collection	Proquest	David	Susan	Systems	One time (as collections are purchased)		
5	Dance in Video I & II	Alexander Street Press	Mike	Mike	Mike	As made available	Combined	Check WorldShare - sma 10/01
6	<a href="#">ebrary</a>	ebrary	Mike	Susan	Mike	Monthly	Updated 9/21/2016	
7	EBSCO A-Z	EBSCO	Mike	Frank	Brittany	Monthly		
8	ECCO		TDB	TBD	Systems	One time		
9	EEBO		TDB	TBD	Systems	One time		
10	Evans Digital Edition & Shaw-Shoemaker		TDB	TBD	Systems	One time		
11	<a href="#">Films on Demand</a>	Films on Demand	Mike	Mike	Mike	As made available	Combined 1/15/2016	
12	<a href="#">Gale Directories Library</a>	<a href="#">Gale</a>	Mike	Mike	Mike	As made available	Combined	
13	<a href="#">Gale Virtual Reference Library</a>	<a href="#">Gale</a>	Mike	Mike	Mike	As made available	Combined	
14	<a href="#">ICPSR</a>	OCLC	David	David	David	Manually		
15	<a href="#">Kanopy</a>	Kanopy	Mike	Mike	Mike	As made available (will load monthly)	Combined	
16	<a href="#">Knovel</a>	OCLC Worldshare	David	David	David	Monthly	combined 9/2015	
17	Marcive DWS	Marvice	David	Susan	Susan	Monthly		
18	<a href="#">Music online: classical music Library</a>	Alexander Street	David	David	David	As made available		
19	<a href="#">Naxos Music Library</a>	OCLC	David	David	David	Monthly	Combined 10/9/2015	
20	<a href="#">Naxos Music Library Jazz (received with with Naxos Music Library)</a>	OCLC	David	David	David	Monthly (included with Naxos Music Library)	Combined 10/9/2015	
21	<a href="#">Naxos Music Library World</a>	none						as of 9/8/16, there is no source for this collection
22	OECD iLibrary (formerly SourceOECD)	EBSCO	David	Frank	Brittany	Monthly	not needed	David opted to use EBSCO bibs
23	Oxford Reference Online --Premium	Oxford	Mike	Frank	Brittany	Monthly		
24	Sabin		Mike	Mike	Mike	One time	Combined & updated 12/21/2016	Susan will check record status
25	US Serials Set Digital Collection I	Proquest	David	Susan	Systems	One time		
26	US Serial Set Digital Collection II Parts A, B, C	Proquest	David	Susan	Systems	One time (as parts are purchased)		
27	<a href="#">Women and Social Movements in The U.S.: Scholars ed.</a>	<a href="#">Alexander Street Press</a>	Mike	Mike	Mike	occasional updates	Combined 7/27/2016	
28	<a href="#">YBP DDA Discovery</a>	YBP	TBD	Susan	Gregg	Discontinued 3/2016 was Weekly	Review 02/25/2015 (previous form)	DDA Discontinued 3/2016
29	<a href="#">YBP DDA Invoice</a>	YBP	TBD	Susan	Gregg	Discontinued 3/2016 was As purchased	Review 02/25/2015 (previous form)	DDA Discontinued 3/2016
30	<a href="#">YBP eBook</a>	YBP	TBD	Susan	Gregg	As made available	Review 02/25/2015 (previous form)	





# ERBL

## Electronic Resource Batch Loaders

- All library faculty & staff involved in e-resource selection, acquisition, management, and loading & maintenance meet biweekly
  - Cataloging
  - Acquisitions
  - Electronic Resources
  - Collection Management
  - Systems
- Information sharing
- Issues discussed, responsibilities assigned, procedures improved
- Problems identified and addressed

## Other local documentation

- [E-Resource MARC Record Edits \(Crib Sheet\)](#)
- [E-Resource MARC Record Edits](#)
- [UL Batch Record Loading Overview & Refresher \(2015\)](#)

# UL eResources SharePoint

File Edit View Favorites Tools Help

X Find: ashby Previous Next Options

Library Tools

Site Actions -> Browse Documents Library Content Matrix Ashby, Susan

New Document Upload Document New Folder Edit Document Check Out Check In Discard Check Out View Properties Edit Properties Document Permissions Delete Document E-mail a Link Alert Me Download a Copy Manage Copies Send To - Manage Copies Go To Source Workflows Publish Unpublish Approve/Reject Cancel Approval I Like It Tags & Notes

Type	Name	Modified	Folder Description	File Description
	Archive	9/25/2015 2:44 PM	old versions of working documents	
	eResource checklists (OLD FORM)	9/25/2015 2:53 PM	eResource checklists created using the old non-combined form.	
	Loading Guides for Law Resources	3/20/2017 11:11 AM	Combined checklists and loading instructions for Law Library resources	
	Loading Guides for Local Resources	4/20/2016 11:42 AM	Combined checklists and loading instructions for Local Resources.	
	Loading Guides for OhioLINK Resources	4/20/2016 11:41 AM	Combined checklists and loading instructions for OhioLINK Resources	
	OCLC Vendor Neutral Overlays	11/17/2015 2:07 PM	Documents pertaining to our discussion of how to handle vendor neutral records.	
	e-resource-loading-guide-FINAL2015-11-03	10/18/2016 9:10 AM		FOR REVIEW -- 2015-11-03 revisions to the e-resource loading guide approved by consensus 2015-08-24.
	e-resource-MARC-record-856-956-recommendation	5/24/2016 5:20 PM		Starting point for discussing/documenting what fields and edit we need in our e-resources MARC records.
	e-resource-MARC-record-edits_2015-12-09	12/9/2015 1:51 PM		Starting point for discussing/documenting what fields and edit we need in our e-resources MARC records.
	e-resource-MARC-record-edits_Crib-Sheet	4/18/2016 11:14 AM		This is a short list of elements that must be verified in bib records for every load.
	e-resource-MARC-record-edits_URLs-Proxy-CentralCatalogContribution	5/24/2016 12:52 PM		Guidelines for the application of proxies and bib record suppression codes for electronic resources.
	record load deletes-draft	2/9/2016 9:26 AM		Draft procedure for record load deletes written by Michelle Mascaro 2/9/16
	Validate Headings in MarcEdit	5/1/2018 10:17 AM		Instructions on using the MarcEdit "Validate Headings" report
	e-resource-loading-guides-Purpose2015-08-11	12/9/2015 1:42 PM		Statement of purpose for the e-resource loading guides.
	loading-refresher-nov-2015	12/18/2015 3:26 PM		Batch record loading overview and refresher presented by Michelle Mascaro and Susan Ashby on 11/30/2015
	marc-collections-assignments20170518	8/9/2018 11:42 AM		Most recent version of the Electronic Resource MARC record collection assignments spreadsheet. Contains links to combined forms if available.

+ Add document

# Links

- [UL UA Loading Guide 2.0](#)
- [UL Kanopy Loading Guide](#)
- [UL Collection assignments spreadsheet](#)
- [KSU Checklist](#)
- [“It Takes a Village \(and a lot of documentation\): Managing Electronic Resources”](#) by Susan Ashby and Mike Monaco
- [“Managing E-Books in an Academic Setting: The Cataloging Perspective.”](#) by Roman Panchyshyn
- [“Asking the Right Questions: An E-Resource Checklist”](#) by Roman Panchyshyn
- [“E-Resource Checklists: Documenting Cataloging Decisions for E-Resource Batch Projects”](#) by Roman Panchyshyn

# Contact information

**Susan DiRenzo Ashby**  
**Coordinator, Library Services**  
**University Libraries**  
**ashby@uakron.edu / 330-972-7240**