Batch Load Point Counter -- CheckList -- Online Monographs
     Processing performed in MARCEditor

Points (1 point equals 1 minute of processing
When points exceed 150 (1 min per point): STOP & contact vendor & request a new record set (or find another vendor)

Statistics for vendor load:

Vendor	Aggregator	001	Records	Process/Load	Errors	Note

1	Field	Preparation & Reports	Points	Note	MARCEditor Reports
1.A		Validation identifies invalid records	1 +150	Stop Contact vendor	Reports/MARCValidator IdentifyInvalidRecords & Print report
1.B		Validation identifies invalid fields/data	2	Save for later review of each field during processing	Reports/MARCValidator Validate Record (HighlightAll / Copy / Paste into text file & Save)
1.C		MaterialType rpt identifies non-book record types	1 +150	Stop Contact vendor if Material Type includes Videos /Audios / Serials	Reports/MaterialTypeReport Print report & review
1.D	000/008	Field/Record count differs from vendor record count	1 +150	Stop Contact vendor Request revised load file	Reports/FieldCount Verify count of 000/008 occurrences
1.E		FieldCount rpt identifies count discrepancies in Field counts	1	Save to review fields during processing (**Steps 3-5**)	Report/FieldCount GenerateReport (TabDelimited) & Save Report
2	**Field**	**Verify field in FieldCount and Validator reports**	**Points**	**Note**	**MARCEditor**
2.A	000	FieldCount rpt identifies 000 Field NOT listed first	1 +150	Stop Contact vendor	Report/FieldCount
2.B	XXX	FieldCount rpt lists the LastField tag as NOT a number	1 +150	Stop Contact vendor	Reports/FieldCount
2.C	000: 05	Deleted record count: Field: 008 & Position 05 =d	2 +5	Identify/Remove records with status=deleted	Review deleted records FindAll (RegEx): (=LDR)(\d{5})([d])(.+)
2.D	245 / 245 $a	Field/Record count differs from vendor record count	1 +2 each	Identify records from MARCValidator rpt with Multiple 245 / Lacking 245 Notify vendor	Reports/MARCValidator errors: Search Validator report for errors: **One 245 field must be present 245: Has been marked as a non-repeating field**
2.E	XXX	Fields/Records with ERRORS Often field/record count differs from vendor record count	2 +2 each	Identify records from MARCValidator rpt with validation errors Notify vendor	Reports/MARCValidator errors: Search Validator report for errors: **Only one 1XX tag is allowed Has been marked as a non-repeating field Incomplete or Dangling Subfield**
2.F	856$u	Review vendor pkg URLs for broken links Note: Test 1 or 2 URLs	5 +150	Stop Contact vendor	Examine first record (Copy/Paste link in browser & Review results)

2.G	856	Field count is less than vendor record count (Field count often exceeds Record count)	2 +2 each	Compare vendor pkg count against Record count	Report/FieldCount Records lacking URL: ___ See :Step **3.M** for further processing
3	**Field**	**Review for Processing**	**Points**	**Note**	**MARCEditor**
3.A	001	Field count equals Record count Identify records: OCLC# with prefix	1	Accept if present	Report/FieldCount Examine first record
3.B	001/035	Records lack 001: OCLC# present in 035 info	2	Move OCLC 035 info to 001	Report/FieldCount Examine first record
3.C	001/035	Records lack 001: Vendor control# present in 035 info	5	Move vendor 035 info to 001	Report/FieldCount Examine first record
3.D	001/035	Records lack 001: No 035 field	2	Create 001 control field	Report/FieldCount Examine first record
3.E	245 $h	245 has multiple $h subfields	1 +2 each	Identify records from MARCValidator report If fewer than 10 records, correct 245$h manually	Reports/MARCValidator errors: Search Validator report for errors: **245- $h: Subfield cannot repeat**
3.F	245 $h	Subfield count differs from Field count	1 +2 each	Identify records lacking $h Add 245$h	Report/FieldCount Review subfield counts (RightClick) StartupMenu/Tools/RDA-Helper/Generate GMD
3.G	RDA 33x	Verify presence of RDA fields: 336 / 337 / 338	1	Review for further processing	Report/FieldCount
3.H	856 $u	Records contain non-pkg vendor URLs	2 +5	Identify/Delete fields with non-pkg vendor 856 Find URLs for vendors that are NOT part of the file'sspecified vendor pkg	FindAll (RegEx): (=856)(.+)(\$uhttp://)(?!<vendorAddy>)(.+) Field sort & view count Find / Delete other vendor pkgs (that are NOT the specified vendor pkg) Ex: (=856)(.+)(\$uhttp://)(?!proquestcombo.safaribooksonline.com)(.+)
3.I	856 $z / etc.	Review FieldCount report for subfields not used locally Local practice: Use only subfields (in order): $3 / $y / $u	1 +2	Determine which subfields are present in URL Identify/Delete non-local subfields: $z (etc.)	Report/FieldCount Review subfield counts (RightClick)
3.J **3.K**	856 $3 856 $y	URLs contain non-std data for subfield: $y & $3	2 +7	Identify/Delete 856 $3 & $y with non-local vendorInfo usage	Report/FieldCount Review subfield counts (RightClick)
3.L	856 $y	URLs lack local $y subfield data	2	Create $y for vendor pkg phrase	Determine vendor package phrase
3.M	856 $u	Adjusted Field count less than Record count Step **3.H** processing may cause more records to lack a URL (compared to Step **2.F**)	2 +2 each	Identify records lacking vendor pkg URL If fewer than 10 records, process manually	Report/FieldCount Review Adjusted Field count Search vendor site for URL & manually create appropriate 856
3.N	XXX	Various fields with invalid format or subfields	2 +2 each	Identify invalid fields with MARCValidator report If fewer than 10 records, correct fields/subfields manually Opt. : Notify vendor	Reports/MARCValidator errors: Search Validator report for errors: **Subfield cannot repeat** **Invalid field format; invalid characters present**

3.O	003	Verify Presence (Vendor MARC symbol)	1	If absent, create field with local MARC library symbol	Report/FieldCount Examine first record
3.P	007	Verify presence Field/Record count differs from vendor record count	1 +1	If absent, create field with defaults: (cr\unu)	Report/FieldCount
3.Q	040	Records lack 040	2	Create field with Vendor/Library OCLC symbol in $a /$ c	Report/FieldCount Examine first record
3.R	050/090	Verify presence in FieldCount report	2 +5	Review for later 949 processing Delete non-standard call#	Report/FieldCount Files with fewer call#s increase 949 processing time
3.S	506	Verify presence in FieldCount report	1 +1	Identify/Delete fields with non-std phrase Create field with std phrase	Report/FieldCount
3.T	530 / 533	Verify presence in FieldCount report	2 +2	Identify/Delete fields/subfields with non-std phrase	Report/FieldCount
3.U	516 / 538	Verify presence in FieldCount report	2 +2	Identify/Delete fields with non-std phrase Create 538 field with std phrase	Report/FieldCount
3.V	650	Verify presence in FieldCount report (Note: RightClick on Field to display SubfieldCounts to view indicator values/counts)	1 +1	Retain Ind2: 0 /1 / 2 / 3 (LC/LCAC/NLM/NAL) Delete other thesaurus subjects: (CSH/RM /Sears) Ind2= 5 / 6 / 8	Report/FieldCount Review Indicator values (RightClick)
3.W	650 local subject	Verify presence in FieldCount report	+2 +2 +2	Swap BISAC 650 to 690 field 650 (ind2=7) with $2bisacsh Delete other thesaurus subjects (650 with Ind2=7) Review "local" subj for retention: Ind2: 4 Review/delete "genre" type subjects: Electronic book(s) / Computer network resources	Report/FieldCount Review Indicator values (RightClick)
3.X	655	Verify presence in FieldCount report (Note: RightClick on Field to display SubfieldCounts to view indicator values/counts)	1 +1	Retain Ind2: 0 / 1 / 2 /3 (LC/LCAC/NLM/NAL) genres Delete other thesauruses genres: (CSH/RM /Sears) Ind2= 5 / 6 / 8	Report/FieldCount Review Indicator values (Right-click)
3.Y	655 local genre	Verify presence in FieldCount report	+2 +2 +2	Retain GSAFD / LCGFT genres: 655 (ind2=7) with $2gsafd or $2lcgft Delete other thesaurus genres (655 with Ind2=7) Delete Local genres : 655 (ind2=4) Review/delete non-std genres: Electronic book(s) / Computer network resources:	Report/FieldCount Review Indicator values (Right-click)

	Field		Points	Note	MARCEditor
3.Z **3.AA**	600 / 610 / 611 651	Verify presence in FieldCount report (Note: On FieldCount rpt box -- Highlight/RightClick then choose CountSubfields. to view indicator values & counts)	1 +2	Retain Ind2:= 0 /1 / 2 / 3 (LC/LCAC/NLM/NAL) Delete Other thesaurus names/geographics Ind2 = 4 / 5 / 6 / 7 / 8	Report/FieldCount Review Indicator values (Right-click)
4	**Field**	**Review for optional processing**	**Points**	**Note**	**MARCEditor**
4.A	0xx	Review Record/Field count	1 +1	Identify fields to delete: 012 / 016 / 029 /037	Report/FieldCount Review 0xx field counts
4.B	300	Review Record/Field count	1 +1 each	Identify Multiple 300$a fields	Report/FieldCount Review $a subfield counts
4.C	300	Review records for 300$a data	1 +1	Determine if print or e-text collation is present	FindAll: =300 Field sort & view count
4.D **4.E** **4.F** **4.G** **4.H**	5xx 6xx 7xx 8xx 9xx	Review FieldCount report for presence of other non-std fields	1 each +1 each	Delete fields with non-substantial info: 583 / 584 / 590 691 thru 699 790 thru 799 84x, 853-855, 86x thru 87x 886 / 887 / 89x 938	Report/FieldCount
4.I	Misc	Review Records for other vendor pkg/info	1 +5	Identify fields with other vendorPkgs Refer to 856 review: Step **3.H** Ex.: ebrary / netLibrary / myiLibrary / Ebook / 24x7	FindAll: (vendorPkg|vendorPkg) Field sort & view count Note May use short form of vendorAddy Ex.: (netlibrary|netLibrary|NetLibrary|ebrary|e-brary)
5	**Field**	**Local Holdings processing**	**Points**	**Note**	**MARCEditor**
5.A	049	Review FieldCount report for presence of 049 field	2 +2	Identify/Delete fields with other Holdings info	Report/FieldCount Review 949 field counts. Examine first record
5.B **5.C**	949	Review FieldCount report for presence of 949 field Create local 949$a subfield using Class# from 050$a Class# subfield	6	Identify/Delete fields with other Holdings processing info Create field with Class# & std. Holdings Processing info:: Subfields: $a / $v / $w & $h / $l / $x / $z	Report/FieldCount ==See additl instructions==: For creating class# info etc. in 949
5.D	949	Field lacks $a Class#	1 +2	Identify records to: update Class#	Tools/Generate Call#s ==See Addtl Instructions==
					Amelia C. VanGundy (1APR12; rev 19AUG14)