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

Purpose:
Checklist: Determines integrity of the vendor file (Steps **1-2**) & identifies fields that need further
                BatchLoad Processing (Steps **3-5**)
                Provides a point system to estimate the time required to process and load a vendor file
Processing: Guidelines for evaluating and updating field data to meet minimal cataloging stds.
                Provides the string expressions used to search, review, and edit/add field data using
                MARCEditor.
Statistics: Track vendor pkgs loaded, record counts, & 001 prefixes

Points (1 point equals 1 minute of processing -- includes both Checklist review & BatchLoad processing)
     When points exceed 150 (1 min per point): STOP & contact vendor to request a new File (or find
     another vendor)

Notes:
The regular expressions (RegEx) language patterns used in the Edit/Find prompts are built for the novice
     MARCEdit user.
     The patterns are given in a consistent format (which may not be the most succinct syntax) and are
     designed to be copied/pasted into the Find prompt.
     When copying RegEx patterns, make sure that there are no leading/trailing blank spaces (often
     displays as boxes).
     Phrases within the angle brackets can be edited at the Find prompt to match any particular search
     info.

Using the CheckList:
Allow 5-10 min. to check the file integrity (Step **1-2**) and Print/Save the appropriate reports.
     Allow 10 to 22 min to identify fields that need further BatchLoad Processing (Steps **3-4**) and also
     estimate how much more time is needed to perform the additional processing (from the +plus points).
     Holdings processing will be required on all records (Step **5**)
     Make notes on the CheckList that identify invalid records/fields that need correcting.
     Make notes on the CheckList that identify the steps/fields that need further processing.

     Note: Almost all Steps in the CheckList are performed in the Validator & Field Count reports
     Note: To print Checklist all on one sheet of paper, use: PrintSettings: *Duplex & 2 pages per sheet
     in landscape*

Checklist Steps:
Step 1: Preparation (6 pts +150max pts)
     Generate Validation / FieldCount reports
     Determine that the vendor file contains the expected number of valid records

Step 2: Verify field in Validator & FieldCount reports (14 +addtl pts +150max pts)
     Examine records for invalid fields from reports
     Verify that URLs link correctly (Step **2.F**: performed in browser)
     Review file for deleted records (Step **2.C**: performed in MARCEditor / FindAll (RegEx))

Step 3: Review for processing (14 pts +addtl pts)
    Note: Policy/procedure decisions have not yet been developed for 3xx RDA fields (Step **3.G**: 1 pt)
    Note: Prefer delaying the 856 subfield vendor/URL review. Always expect to process the 856 field
    (Step **3.H**-Step **3.M**: 9 pts +addtl pts)

Step 4: Review for optional processing (10 pts + addtl pts)

Step 5: Local Holdings processing (10 pts +addtl pts)
    Note: Always expect to process the 049 / 949 fields

Total points: (54 pts +addtl pts)
Note: If the processing is taking up too many points
    --Simplify & omit Step4 (Opt.Processing)

Processing the MARC records:
Follow the printed Checklist and cut/paste from the Processing guidelines. (Don't print out the Processing
    guidelines.)

Review/correct Validator errors from the CheckList (Step **2**)
Review/process fields identified in the CheckList (Step **3**-Step **4**)

Before/after each processing step, review field using FindAll:
    Sort on FoundText & check first/last entry to determine if all fields comply or are a consistent/match
    Note: For trusted vendors, reviewing each field before processing may not be necessary.

Before each processing step, SaveAs separate file. After each processing step, verify Field/Record count
    and Save
    If a processing step has made an unintended change, use: Edit/SpecialUndo & try again. Or, revert to
    last saved file from the previous step.

Note: Prefer to review the FieldCount report box interactively. More detailed info/counts for the field
    will display when you Highlight/RightClick then choose CountSubfields.

Use the saved FieldCount report as a baseline for the original file. (Improperly using some advanced
    MARCEdit tool combinations may corrupt/delete the records.)

Note: Instructions highlighted (in yellow) refer to other more detailed processing or to procures not yet
    posted.

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