# Wrangling E-Resource Catalog Records

AT TEXAS STATE UNIVERSITY



#### Who We Are



# Misty Hopper

Head of Cataloging & Metadata Services

Has also worked at:

- University of Texas at Austin– Perry Castañeda Library
- University of Illinois Urbana-Champaign--Main Library

## Mary Aycock

Database & Metadata Management Librarian

Has also worked at:

- University of Missouri at Columbia
- Missouri University of Science & Technology

## About our Library

# Texas State University University Libraries Five Branches

- Alkek Library
- Archives & Research Center repository
- ► Round Rock Campus Library
- University Archives
- ▶ The Wittliff Collections

## Meeting the Needs of our Library Staff

- Acquisitions
  - Separate records for each vendor
  - Separate records (even if same vendor)
    - Purchased
    - Leased
    - Demand driven
  - Easy collection retrieval in the catalog
  - Library of Congress classification for subject analysis
  - ▶ Fund codes

- Subject Librarians
  - ▶ Is resource purchased or leased?
  - User access notes
  - ► Library of Congress classification
  - ► LCSH subject headings
  - Local subject headings
  - Local collection headings
  - Fund codes

#### Tricks we use to meet library staff needs

Separate Records for each vendor/purchased/leased/Demand

- 001 Bib ID number alpha code prefix is added
  - Alexander Street Press leased records: asp12345678
  - Alexander Street Press purchased records: aspp12345678

Easy collection retrieval in catalog

- 730 collection titles! Added by Collection Manager or batch processing
  - Example: 730 0 Springer Education Collection.

#### Fund codes

Searchable 691 field coded with year, fund code, staff code: 1930L

Purchased or leased notes in bibliographic records (500 note & permanent 9XX fields)

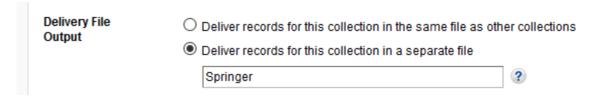
User access notes in bibliographic records (500 note & permanent 9XX fields)

#### What do our researchers need?

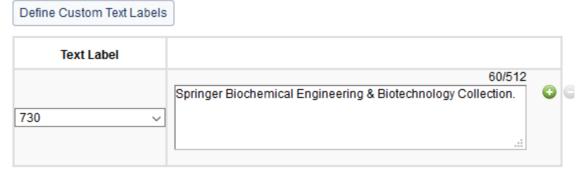
- One record per work
- Robust bibliographic description
  - Accurate titles
  - ▶ Table of contents
  - Summaries
  - Subjects (both keyword and LCSH)
  - Authors
  - Uniform titles (particularly for music works)
- Links that actually work

### Merging Records from a Single Vendor

- Collection Manager Delivery Files
  - Single vendor Same format Purchased or Leased
    - ► Code single delivery file
    - ▶ For each CM collection, program the addition of a 730 collection access point



#### MARC Custom Text



# All Springer CM Records Delivered to Springer Delivery File

	171	· ·
	Added	
730 Series	in CM?	Collection Name on Worldshare Collection Manager
Springer Biomedical and Life Sciences Collection.	yes	Springer Biomedical and Life Sciences eBooks (YYYY) English+International
Springer Earth and Environmental Science Collection.	yes	Springer Book Archive - Earth and Environmental Science
Springer Earth and Environmental Science Collection.	yes	Springer Earth and Environmental Science eBooks (YYYY) English+Internationa
Springer Business and Economics Collection.	yes	Springer Business and Economics eBooks (YYYY) English+International
Springer Business and Economics Collection.	yes	Springer Business and Management eBooks (YYYY) English+International
Springer Business and Economics Collection.	yes	Springer Economics and Finance eBooks (YYYY) English+International
Springer Chemistry and Materials Science Collection.	yes	Springer Chemistry and Materials Science eBooks (YYYY) English+Internationa
Springer Complete Protocols Collection.	yes	Springer Complete Protocols
Springer Computer Science Collection.	yes	Springer Computer Science eBooks (YYYY) English+International
Springer Professional and Applied Computing Collection.	yes	Springer Professional and Applied Computing eBooks (YYYY) English+Internati
Springer Education Collection.	yes	Springer Education eBooks (YYYY) English+International
Springer Energy Collection.	yes	Springer Energy eBooks (YYYY) English+International
Springer Engineering Collection.	yes	Springer Engineering eBooks (YYYY) English+International
Springer Humanities, Social Sciences, and Law Collection.	yes	Springer Humanities Social Sciences and Law eBooks (YYYY) English+Internation

# Communication / Communication What is Cataloging/Acquisitions doing?

- ► How we simplified communication between departments
  - Spreadsheet in shared folder documenting collection details
    - Records: Vendor; Collection Name; How cataloged; Purchased/Leased/Demand driven/Evidence based/Open source information; Format; Notes about the collection
  - Internal Cataloging spreadsheet to denote how to process each collection
    - Coding match points, collection access points, purchased/leased information, etc.

		0 1 (001011		A .1		500	500	500		500
		Overlays (OCLC # or		Authority		"Multi-user	"Single-user	"Purchased	500	"Open
CM MARC Record File Name	Cataloger	856 Link # Identifier)	001 Prefix	(YY/MM)	691	access"	access"	title"	"Leased title"	access"

- Sharepoint Task Form to assign Cataloging staff work:
  - New/existing collection work
  - Collections to be cancelled

The Wild West of Cataloging E-Resources

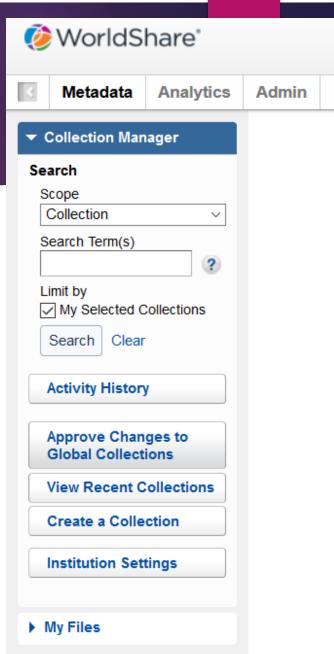


Title or Collection *		
Vendor		
How Cataloged? *	~	
Priority	Normal ~	
Task Status	New Order - MH" in Task Status means assign to Misty Hopper	
Description		
	Click for help about adding basic HTML formatting.	
	For "New Order- MH" describe how MARC records will be retrieved. Collection	1
	Manager (manually selected or auto supplied by vendor), Vendor Records, Title	
	Title.	
Comments		
	.:.	
691		

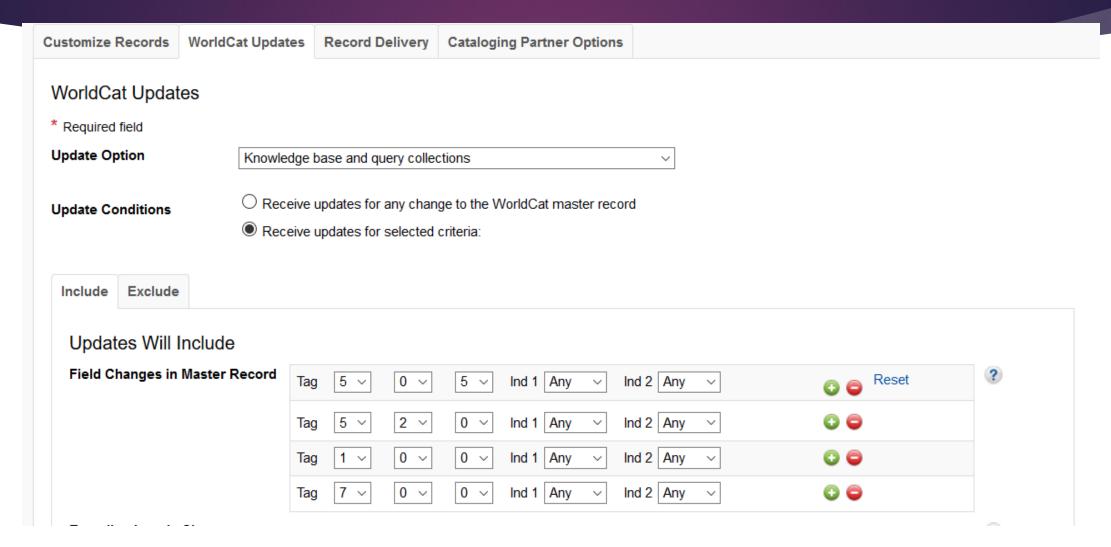
Tracings	✓ None				
	Add Reference Collection tracing				
	Add Single-user access				
	Add Multi-user access				
	Add Career Guide				
	Add Purchased title				
	Add Leased title				
	Add Patron Driven (905)				
	Specify your own value:				
	Indicates which tracings or notes to add to the MARCs				
Public Performance Rights?	Not applicable ~				
Expiration date?					
	Date collection will expire online (not needed for renewable subscriptions)				
Format *	E-book ~				
Overlay old record(s)? *	□Yes				
	□No				
	□ Not Applicable				
Assigned To *	Enter a name or email address				

# Receive WorldShare Collection Manager Records

- Advantages
  - ► Free! With full membership
  - Can update records (metadata or knowledge base)
  - Customizable
    - ► Choose frequency of records
    - ► Choose which updates to trigger
    - ▶ Choose to receive full files each month



# Trigger examples



#### MARC delivery

WorldCat Updates Customize Records Record Delivery **Cataloging Partner Options Record Delivery** Customize how often and under what conditions your records will be delivered. Format MARC 21 with MARC-8 **Delivery Frequency** Monthly File Output ✓ Deliver my serials in a separate file (.ser) ✓ Deliver records for WorldCat updates in a separate file (.wcholdings) Uniform Resource Identifiers (URIs) Name Headings Identity Services **GND Authorities** ✓ LC/NACO Authority File Subject Headings Identity Services GND Authorities ✓ LC Subject Authority File ✓ MeSH Authorities

## Processing with CM files

- Process files via a Ruby program called MARC\_set\_wrangler (credit to Kristina Spurgin, Library Data Strategist, of University of North Carolina, Chapel Hill) <a href="https://github.com/UNC-Libraries/MARC-record-set-wrangler">https://github.com/UNC-Libraries/MARC-record-set-wrangler</a>
- Compares full collection loads of the current month with the previous month.
  - Generates new files specific to our parameters
    - ► New files
    - Updated file
    - ▶ Delete files

#### omit from comparison fields:

```
- tag: '65[35]'
```

**i2**: '[1234567]'

field does not have: 'lcgft|gsafd'

#### Ruby program: Features we Use

- Add fields to records
- Clean up & add prefix to id fields (001 in cataloging speak)
- Authority control: Flags records that have changes to controlled access points (author, subject, series) which reduces the number of records sent to authority control vendor.

```
1) WCM - routine update using most recent whole file + last whole file (Not Under Authority Control)
2) WCM - routine update using most recent whole file + last whole file (Under Authority Control)
3) WCM - whole file - new or fresh reload
4) WCM - routine update using most recent whole file + current ILS set
Which of the above workflows do I use? 3
1) WCM - ACSArchives
2) WCM - ACSFrontFile
3) WCM - ACSESSDigital
4) WCM - ACSESSDigital
4) WCM - AlexAudioPurchased
5) WCM - AlexEbookPurchased
6) WCM - AlexEbookPurchased
6) WCM - AlexMusicScore
8) WCM - AlexVideo
9) WCM - AlexVideo
10) WCM - BloomsburyDesign
11) WCM - EbookCentralAcademic
```

Operates on command line

### Final Processing of Records

- ► Electronic Resources cataloger plays key role as last stop quality control/troubleshooting. Some activities:
  - VERY IMPORTANT: Verifies URLs are working
  - Eliminates fields that can cause catalog problems (029)
  - Ensures correct collection tracings appears
  - LC call number (core subject)
    - ▶ When possible, matches call number with current tangible holdings
  - Subject headings (core subjects)
  - ▶ Diacritic maintenance & other cleanups
- Loads the records

## Case Study: Upgrading Proquest records

- Purchased records from Acquisitions vendor
  - Advantages:
    - ► Fairly consistent quality
    - ► Ease of cataloging
  - ▶ Disadvantages:
    - Standards evolve (RDA, Provider Neutral record), records become outdated
    - ▶ Missing out on community enhancements, such as TOC or summaries
  - ► Added Challenge:
    - ▶ Records include number of users notes in MARC record (Single-user) that need to be retained/updated

# Phase 1: Create consistent matchpoint to overlay vendor records with CM records

- ▶001 of purchased vendor records involved identifier (usually found in URL)
  - ► ebcp1075080 →
  - https://ebookcentral.proquest.com/lib/txstate/detail .action?docID=1075080

## Step 1: Delete existing 001

- ► Easily convert identifier (001) in records from CM using URL via MarcEdit
  - ▶ Delete existing 001 of OCLC # (Using Add/Delete field)

# Add/Delete Field Utility Field: Field Data: 001

Delete Field

#### Step 2: Build New Field in MarcEdit

Build New Field Tool works by utilizing patterns to generate a new MARC field from existing data in a record. Enter the desired Field pattern, using field/subfield combinations when data from within a record should be used as part of the new field..

#### Examples:

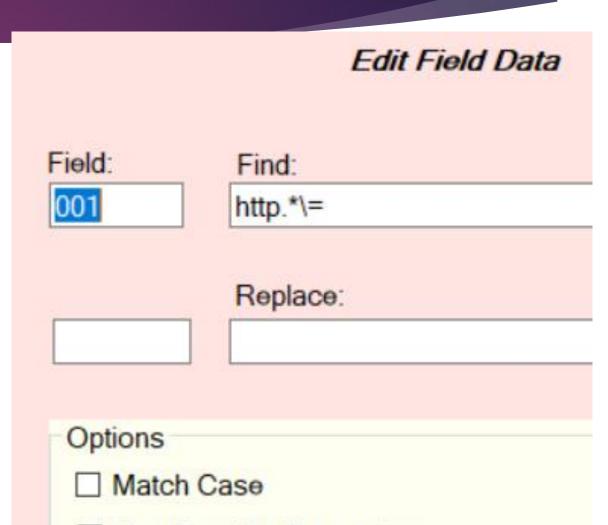
- \* =856 41\$uhttps://mylibrary.proxy.edu?{856\$u}\$zConnect to this Resource
- \* =099 \\\$a{050\$a}\$b{050\$b}

#### Pattern:

=001 ebcp{856\$u}

# Step 3: Regular Expression replacement

- Using Edit Field, do a replacement to eliminate all parts of the links except for the vendor ID.
- Before: ebcphttp://libproxy.txstate.edu/login?url=https://e bookcentral.proquest.com/lib/txstate/detail.action ?docID=408518
- After: ebcp408518



## Phase 1, Matchpoint, continued

- Added Challenge: Proquest has absorbed so many vendors over the years making it difficult to find official "Proquest" identifier for them (RIP ebrary, etc.)
  - Proquest spreadsheet to the rescue: had many of these identifiers listed
  - ▶ For those that weren't found, used macro to obtain URL
  - Needed to dedup many records



# Deduplication of records: Low-tech method Using Excel

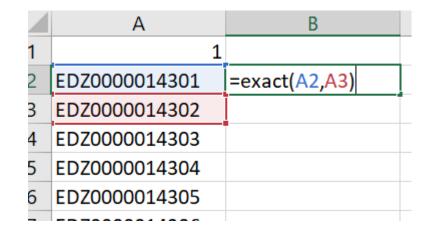
- ▶ 1<sup>st</sup>: Find matchpoint to dedup records (001, URL, etc)
- ▶ 2<sup>nd</sup>: Export selected fields from OPAC records in package
- 3rd: Open in Excel and sort by matchpoint
- ▶ 4<sup>th</sup>: Setup 2 columns with "Exact" formula
- ▶ 5<sup>th</sup>: Copy "True" values into tab
- ▶ 6<sup>th</sup>: Re-sort and select dups to delete
- 7<sup>th</sup>: Copy dups & save to file to import into ILS

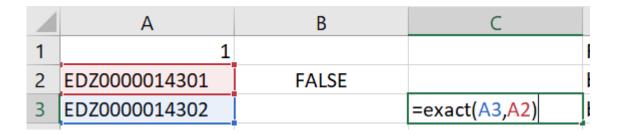


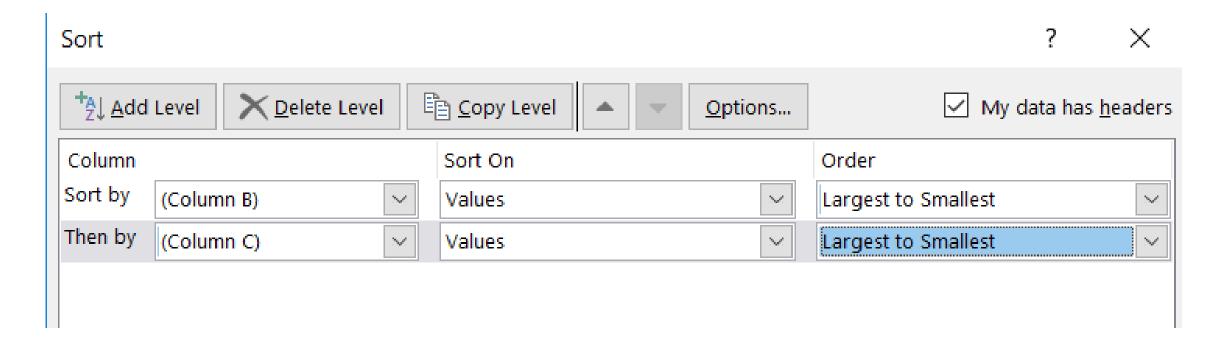
Credit to Matthew Inman for "Tumbeasts"

#### Spreadsheet containing potential dups

	А	В	С	D	Е
1	1	RECORD #(BIBLIC	UPDATED(BIB	CREATED(BIBLIO	245 a
2	EDZ0000018140	b21010249	4/7/2014	4/29/2011	Occasionalism
3	EDZ0000018144	b21010250	9/27/2013	4/29/2011	The unity of consciousnes
4	EDZ0000018145	b21010262	3/4/2015	4/29/2011	Truth-conditional pragma
5	EDZ0000018146	b21010274	9/27/2013	4/29/2011	Sexual solipsism
6	EDZ0000018147	b21010286	9/27/2013	4/29/2011	Freedom and belief
7	EDZ0000018272	b21010298	9/27/2013	4/29/2011	Semantics vs. pragmatics
8	EDZ0000018152	b21010304	9/27/2013	4/29/2011	Contractualism and the fo
9	EDZ0000018153	b21010316	9/27/2013	4/29/2011	Truth through proof
10	EDZ0000018156	b21010328	9/27/2013	4/29/2011	Practical tortoise raising,
11	EDZ0000018170	b2101033x	9/27/2013	4/29/2011	Social epistemology
12	EDZ0000018174	b21010341	9/27/2013	4/29/2011	Partiality and impartiality
13	EDZ0000018287	b21010353	9/27/2013	4/29/2011	Essays on skepticism
14	EDZ0000018183	b21010365	9/27/2013	4/29/2011	Essays in the metaphysics
15	EDZ0000018184	b21010377	1/30/2015	4/29/2011	The domain of reasons
16	EDZ0000018190	b21010389	10/29/2014	4/29/2011	Intuition, imagination, an
17	EDZ0000018294	b21010390	9/27/2013	4/29/2011	Eternal God
18	EDZ0000018194	b21010407	9/27/2013	4/29/2011	Attempts
19	EDZ0000018195	b21010419	9/27/2013	4/29/2011	Procreation and parentho
20	EDZ0000018204	b21010420	1/23/2014	4/29/2011	Self, no self?







226	EDZ0001906993	FALS	FALSE TRUE		b471	.26760	8/9/2018	8/9/2018	Gothic architect	ure /
227	EDZ0001906994	FALSE		TRUE	b471	.26772	8/9/2018	8/9/2018	The American W	/est/
228	EDZ0001909089	FALSE		TRUE	b471	.26784	8/9/2018	8/9/2018	Glasgow /	
229	EDZ0001909102	FALS	E	TRUE	b471	.26796	8/9/2018	8/9/2018	Brazilian cinema /	
230	EDZ0001909103	FALSE		TRUE b4		.26802	8/9/2018	8/9/2018	9/2018 Katharine Hepburn	
231	EDZ0001909104	FALSE		TRUE b47		.26814	8/9/2018	8/9/2018	2018 Invasion of the body	
232	232 EDZ0001909105 FALSE		E	TRUE b4712		.26826	8/9/2018		8/9/2018 Repo man /	
233 EDZ0000014301		FALS	E	FALSE	b350	1524x	10/12/2016 1	0/12/2016	Dress and ethnic	city
2	A	В	С	D		E	F		G	/ Ame
1	1			RECORD #(BI	BLIO)	UPDATED(B	CREATED(BIBLIO)	245 a		
2	EDZ0000023516	FALSE	TRUE	b46995791		8/2/2018	7/25/201	.8 Access t	to health care	
3	EDZ0000023516	TRUE	FALSE	b46984847		8/2/2018	7/25/201	.8 Access t	to health care	
4	EDZ0000023517	<b>FALSE</b>	TRUE	b46995808		8/2/2018	7/25/201	8 Addiction	on	
5	EDZ0000023517	TRUE	FALSE	b46984859		8/2/2018	7/25/201	8 Addiction	on	
6	EDZ0000023518	FALSE	TRUE	b4699581x		8/2/2018	7/25/201	.8 Commu	ınity air pollutio	n
7	EDZ0000023518	TRUE	FALSE	b46984860		8/2/2018	7/25/201	8 Commu	ınity air pollutio	n
8	EDZ0000023519	FALSE	TRUE	b46995821		8/2/2018	7/25/201	8 Health	promotion	
9	EDZ0000023519	TRUE	FALSE	b46984872		8/2/2018	7/25/201	8 Health	promotion	
10	EDZ0000023520	FALSE	TRUE	b46995833		8/2/2018	7/25/201	8 Ambier	nt air quality star	nd
11	EDZ0000023520	TRUE	FALSE	b46984884		8/2/2018			nt air quality star	
12	EDZ0000023521	FALSE	TRUE	b46995845		8/2/2018		8 Behavio		
13	EDZ0000023521	TRUE	FALSE	b46984896		8/2/2018		.8 Behavio		
						_, _,	-,,			

#### Phase 2: Resolve User Notes

- Out of sync with reality due to multiple mergers, database entropy
  500 | | | Single-user access.
- Vendor spreadsheet to the rescue
  1-user,1-user,1-user,1-user,1-user
- Added metadata to local 9XX fields
- Added Challenge:
  - ▶ Different models, such as non-linear purchase models (325 use limit annually)
  - Compromise: Displayed user note as:

```
500 "Multi-user access; 325 use limit"
```

# Phase 3: Overlay records with CM records

- ► Change 001 of incoming records through MarcEdit
- Overlay records (Run test beforehand)
- User access in 970 field: Globally inserted notes after overlay
  - Example: 970 2 user

Misc. 970 2 user

▶ 500 "Two-user access"

Note 500 "Two-user access"

#### Database Rule: Do No Harm

- ▶ Some bad apples: Overall records improvement, but 5% (~1,000) of CM records worse than existing records
  - ▶ Bare bones minimal records
  - Subject headings were sub-standard (no LCSH).
  - ▶ 505 & 520 often seemed questionable.

=505 0\\$alntro; Half Title; Title Page; Copyright; Contents;

#### Conclusion

▶ Hopes to someday be able Use Collection Manager to combine records for the same e-resource title

► Future Library Systems on the market or in development

#### Questions? Comments? Ideas?

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