

Best Practices
Batch Loading Large Electronic Record Sets in *Prospector*
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Invite a cataloger to check a sample record set to see if global changes are necessary to the records (i.e. if the library adds a proxy rewrite; or a |z to the 856 field that is unique; or an 006 or 007 needs to be added)

LDR

- All records need a Leader in order to load properly.
- Encoding Level (byte 17) should be set to “L”, which is a full-level input added from a batch process. This indicates a full-level record batchloaded from an institution other than LC, NLM, BL, NLC or NLA.

001

- All records should have an 001.
- Check to see that the number of 001s equals the number of 245s.
- Review a sample of records checking the 001 to see if the number is a valid OCLC number and that it matches the potential OCLC record assigned to that number.
- If the record number is a number that is within the OCLC number range (i.e.1 through 99,999,999), add an alphabetic prefix. While this number causes no problems now, it is not a valid OCLC number and it may cause problems when OCLC assigns that number in the future.
- Any record that has a number other than an OCLC control number in the 001 needs an alphabetic prefix. If there is no 001, create an identifier adding an alphabetic prefix to a number; the number can include the unique identifier in the URL.
- When creating a prefix, check *Prospector*, performing an OCLC number search to see if that prefix has already been used. Commercial vendors usually provide their own prefix on their 001. For instance, *ebrary* adds “ebr” in front of its 001 number and *SerialsSolutions* adds “ssj”. Marcive uses “tmp”; OCLC employs “ocm,” however, the INN-Reach program strips that prefix.
- When checking to see if a prefix has been used in *Prospector*, the goal is one of two points – to make sure that if the prefix already exists, it is found on records from the same vendor. That way, records match when appropriate within that vendor set. The second point is to make sure the prefix is unique if it is locally created. This insures that the local control number does not match on a vendor control number by mistake.

020/022

Change coding of print ISBN or print ISSN on electronic records to 020 |z or 022 |y because *Prospector* uses the ISBN or ISSN as the second match point (001 is the first match point).

Item record

- All records should have an item record.
- If no item record exists, the item record will assume the 856 |z of whichever library precedes it in the list of holdings in *Prospector's* display.

Record Loads

- Test load 1-5 records; check *Prospector* to see how and what the record matches.
- *Prospector* high use is from 8:00 a.m. – 5:00 p.m. on Monday through Friday. To avoid congestion in *Prospector* processing, load records at the end of the work day instead of early in the morning.
- To avoid congestion, load no more than 10,000 records at a time; if the loader adds an item record or if a 9xx field adds an item record, 5,000 bib records will generate 5,000 item records for a total of 10,000 records.
- If it is necessary to load more than 10,000 records for a special project, call the Alliance to alert them to the load and discuss the scheduling.

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