

6-18-2012

## Traditions and Transitions in Batchloaded Catalog Data

Susan A. Massey

University of North Florida, smassey4jc@hotmail.com

Follow this and additional works at: [https://digitalcommons.unf.edu/library\\_facpub](https://digitalcommons.unf.edu/library_facpub) Part of the [Library and Information Science Commons](#)

### Recommended Citation

Massey, Susan A., "Traditions and Transitions in Batchloaded Catalog Data" (2012). *Library Faculty Presentations & Publications*. 25.[https://digitalcommons.unf.edu/library\\_facpub/25](https://digitalcommons.unf.edu/library_facpub/25)

This Article is brought to you for free and open access by the Thomas G. Carpenter Library at UNF Digital Commons. It has been accepted for inclusion in Library Faculty Presentations & Publications by an authorized administrator of UNF Digital Commons. For more information, please contact [Digital Projects](#).

© 6-18-2012 All Rights Reserved

**Traditions and Transitions in Batchloaded Catalog Data. A Report of The ALCTS Cataloging & Metadata Management Section Cataloging & Classification Research Interest Group, American Library Association Midwinter Meeting, Dallas, Texas, January 2012**

Author: Susan A. Massey

***Technical Services Quarterly***

**Volume 29, Issue 3, 2012**

Pages 236-238

**DOI:** 10.1080/07317131.2012.682013

The ALCTS Cataloging & Metadata Management Section Cataloging & Classification Research Interest Group (CCRIG) met at the ALA Midwinter Meeting in Dallas for three presentations on the topic of “Traditions and Transitions in Batchloaded Catalog Data,” followed by a panel discussion by the speakers addressing audience questions.

In the current economic climate, libraries must adopt cost-effective methods to facilitate access to collections. Vendor-provided records enable access to individual titles when batchloaded into the catalog, but often have substantial quality issues. In this meeting, CCRIG explored the benefits, challenges, and best practices for batchloading vendor catalog records.

Rebecca L. Mugridge, Head, Cataloging and Metadata Services, Penn State University Libraries, described the results of her research on “Batchloading: Current Practices and Future Challenges: A Survey of Large Research Libraries.” The research was built on an earlier article co-authored by Jeff Edmunds, “Using Batchloading to Improve Access to Electronic and Microform Collections” published in 2009 in *Library Resources & Technical Services*. As Penn State's batchloading workflows became time-consuming, they sought information on how other large institutions resolved similar issues. A survey was distributed to the ALCTS Technical Services Directors of Large Research Libraries Interest Group. Responses indicated that nearly three-fourths of institutions assign cataloging departments the primary responsibility for batchloading, and time to load varies from one week to three months. Some libraries resolved unacceptable load delays by turning to alternative discovery systems. The full results of the survey will be published in an upcoming issue of *Library Resources and Technical Services*.

Stacie Traill, Cartographic and E-Resources Cataloging Coordinator, University of Minnesota Libraries, and Chew Chiat Naun, Cataloging Strategist, University of Minnesota (UM) Libraries, presented “Quality Issues in Vendor-provided Records for E-books.” Since 2003, the UM catalog has followed a multiple record policy and not attempted to merge batch duplicates into a single provider neutral record. This enabled Traill and Naun to study record errors, divergent practices among vendors, and omissions that may affect access, using Provider Neutral Record and Monograph Aggregator Vendor Guidelines as baselines. They developed a checklist to record potential problems with systems and individual records as they loaded record sets.

Some of the issues discovered included basic coding, compliance with established guidelines, control number and identifier errors, cross-walking problems, obsolete data such as old authorized headings, multiple URLs, and record inconsistency between batches. The speakers suggested creating a list of critical record content problems and addressing these with vendors, as well as finding collaborative ways to share file edits.

Kathryn Lybarger, Coordinator of Cataloging and Metadata, University of Kentucky, spoke on “Fast, but Accurate? Pitfalls of Batch Metadata Editing.” She addressed problems that may arise with vendor records distributed through large cooperative environments such as OCLC. Some of the issues include mixed data from automated record merges, links restricted to specific institutions and not accessible to all users, broken links or incorrect DOIs, and books listed by the vendor but not available. Ms. Lybarger recommended using a local editor such as MarcEdit to check and batch edit records, coupled with a file management system such as Mercurial for edit version control. She suggested the need for feedback systems to identify and report dead links, since generic link checkers can be ineffective because they may not click through to text.

Audience responses during the panel discussion indicated that many institutions are experiencing similar issues with batchload workflows and there was interest expressed in an opportunity to dialog with vendors and explore solutions to obtaining better data or sharing record edits.