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OhioLINK and Vendor Records Quality Control

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OhioLINK and Vendor Records Quality Control

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Overview

The **Ohio Library and Information Network (OhioLINK)** is the Ohio academic library consortium with 118 member libraries from public universities, independent colleges, two-year colleges, law schools, and medical schools, as well as the **State Library of Ohio**. Prior to 2014, volunteers from **OhioLINK** member institutions provided MARC records for consortially-purchased, shared electronic resources (e-resources) but since then, **OhioLINK** central office staff have taken on this role. With now having a dedicated cataloging staff of two full-time employees, **OhioLINK** has been able to do record clean-up projects as well as work to improve vendor record quality control, which includes streamlining batch record editing and engaging vendors with record issues and ideals. At the end of the day, both libraries and vendors want their materials to be found and used by end users.

Performing Quality Control on Vendor Records

MARC records from vendors often need editing of some sort, whether it's because there is information missing or because it needs updating or correcting. Due to our **OhioLINK** e-resource records being provided to so many members, our cataloging staff takes time to address quality control on behalf of them, since any time spent in the central office saves the time of all our members. By making the edits in the **OhioLINK** office, our members do not have to take the time to each make them, or not be able to and then have lower quality records. However, while saving the time of our members is important, so is streamlining our efforts to do so in an efficient way. There are three main aspects to how we preform quality control on vendor records: guidance from committee cataloging standards, MarcEdit features, as well as reassessing workflows and conducting projects as needed.

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OhioLINK has numerous member committees that, among other things, set policy. The Database Improvement and Discoverability Policy Team (DIAD) has several cataloging policy standards by format that set expectations for **OhioLINK** shared e-resource records. The DIAD cataloging standards build off national standards and add priorities and preferences such as **OCLC** number, call numbers, and specific wording for consortial notes and links. Based on guidance from these standards, the **OhioLINK** cataloging staff review and batch edit vendor records to ensure that they are up to DIAD's standards before the records are provided to members for local use in their catalogs.

As a practical matter, MarcEdit is our main tool for batch editing. It is free software created and maintained by **Terry Reece**, who also has documentation on his website and some short instructional videos (<https://marcedit.reeset.net/>). MarcEdit has many useful features, both basic and advanced that facilitate easy batch editing. Basic features such as Field Count report, Add/Delete Field tool, and Replace tool help figure out what is in or missing from the records and quickly apply batch edits to the entire file. Advanced features require a bit of set-up but are worth it since they are quite powerful. There are quite a few but **OhioLINK** uses the customizable Assigned Tasks the most, especially for adding **OhioLINK** proxy links and notes, correcting indicators, and moving non-electronic ISBNs. Also, Validate MARC Records is great at finding certain errors in the metadata or any oddities that might cause issues when loading the records. As a batch editing tool, MarcEdit is both versatile and robust, saving a lot of time.

Beyond committee standards and MarcEdit, the final aspect of quality control at **OhioLINK** is making use of the dedicated **OhioLINK** cataloging staff at the central office. Now with two full-time cataloging staff, **OhioLINK** has been able to reassess workflows for various vendor records and complete quality control projects. Overtime, vendor record quality can change for the better or for the worse, sometimes drastically but usually gradually. Due to this, it is important to be flexible and reassess workflows as changes arise. **OhioLINK** strives to streamline quality control through automated or batch editing means when possible, which is why MarcEdit is a valuable tool. As far as projects go, this can include retrospective projects to clean up issues found in cataloging records and bring them up to current DIAD standards.

Working with Vendors to Improve Record Quality

Ideally, vendors would understand the value of and provide full-level cataloging records that are complete and include **OCLC** numbers, but that is not always the case. Although many vendors provide MARC records, they do not seem to be high on their priority list. The

quality and standards of the records vary by vendor although some offer certain customizations, typically set during purchase. Over the years, **OhioLINK** has worked with different vendors to improve their record quality in two separate ways: reporting issues and engaging about larger trends.

Reporting cataloging and quality control issues with records to vendors is a simple way to call their attention to record quality that many are not even aware occur in their MARC records. Some vendors provide their own records while others contract with **OCLC** to provide them on their behalf. This means that sometimes issues might need to be reported to a vendor while others to **OCLC**. Since **OhioLINK** began regularly reporting issues, it seems that vendors were not aware of the quality control issues or why they were problematic, making it sound like vendors are not hearing about these issues from other libraries. This could also be a result of newer systems auto-loading records into the local integrated library system (ILS) and catalog without, or with minimal, review by library staff or catalogers which means the issues are less likely to be noticed and thus not reported. Also, perhaps there is a belief that reporting cataloging record quality issues to vendors will not make a difference. Even in a case in which a particular vendor was not going to be able to make the change that **OhioLINK** asked about, at the very least the importance of full-level, complete records was conveyed to the vendor even though the request was not currently achievable by the vendor at the time. One library reporting an issue, or their ideal record preferences, only holds so much sway, but a whole community has a louder voice and can make a larger impact together. As staff time and resources become more valuable, working together as an entire library community could be an important way in which to improve overall record quality of vendor records.

While reporting issues, **OhioLINK** cataloging staff start to document trends when found and due to this have been able to engage certain vendors on larger discussions about record quality and how to improve it. In one case, **OhioLINK** is working with **OCLC** and a publisher in a joint effort to identify the causes and remedy them to ensure higher quality vendor records for that collection. Discussions took a while to begin, since it was not clear where or with whom the issues were occurring. Time and persistence, along with reaching the appropriate vendor staff helped get the process started, but it was the detailed examples and documentation that ensured their attention and willingness to engage about their record quality. Part of what has helped is a good relationship with the publisher's sales representative, who suggested the relevant people to work with when the issues were not getting resolved. It certainly takes time to document

and work together as a group on record quality for this collection, but **OhioLINK** values the bigger impact that it will have in the long run. Not only will improved record quality benefit **OhioLINK** and our member institutions that use **OhioLINK**-provided MARC records, but also all of the other libraries worldwide who purchase this collection and use the vendor records. It is with this in mind that **OhioLINK** continues to pursue the improvement of record quality for all vendor records.

Conclusion

Working together, libraries and vendors can improve MARC record quality to the benefit of libraries, vendors, and the end users to facilitate better use of purchased content. This is particularly important for e-resources since quality metadata drives their discovery and use. While libraries can address vendor record quality locally, including by streamlining batch editing, documenting and reporting issues and larger trends to vendors, it takes additional staff time and resources which may not currently be possible at many libraries. Working together as a library community on vendor record quality would take the burden off of individual libraries while making use of their local expertise.

Over the years, **OhioLINK** cataloging staff have learned many valuable lessons from vendor records worth sharing. When starting with a new vendor, make sure to discuss record quality, get sample records, and ask about customizations since many offer them. It also helps to distinguish "required" information or fields versus "nice-to-have" so the vendor will know what the library values and why. All vendors have different processes for creating cataloging records. Some create their own, others contract out, some machine-generate, and some have in-house catalogers. This variation means that some vendors can more easily address issues than others, depending on their MARC record workflows. While it never hurts to inform vendors of record quality, be prepared for the possibility of minor to no improvements being made. Also, even if vendors can fix issues and address the larger trends, changes can take a while, which can be due to what is being requested or how much demand there is for it, which is why the library and cataloging community reporting issues and engaging vendors about record quality matters for everyone. 🌱