What is the recommendation for loading MARC records into a library's catalog?

The Program for Cooperative Cataloging formed a Task Group in 1999 to look into MARC records for Journals in Aggregator Databases. The initial charge of this group was to come up with guidelines for MARC records to be used by Aggregators. These records would either be derived from CONSER records for the print versions, or they would be machine generated. A second charge was to analyze how these records are being used and to make recommendations for loading these MARC records into a library’s OPAC.

The work of the Task Group showed the need for a compromise in the way records are represented in the catalog. On the one hand, catalogers and reference librarians prefer that a given journal be represented only once in the catalog and if there are different manifestations of that journal (print, electronic, microfilm) that these are represented as separate summary-holding elements within the one record. This "single record" technique is, in most cases, better for the end-user. However, the nature of journals in aggregator databases is such that this approach is not practical. Within an aggregator database, titles are added and dropped, coverage changes and even aggregations change. Because an aggregation includes hundreds or thousands of full text journals, manual processes to manipulate the records are generally not used. A reasonable solution for representing aggregator journals in a catalog is one that can be completely automated. Complete automation is currently only practical by using a separate record for the electronic version of the journal.

To this end, the Task Group, while acknowledging the desire for using a single record approach, has recommended that a separate record technique is the only practical approach at this time. Their reports outlines a technique used successfully by one library where the library loaded aggregator records using a "high" range of record numbers and thereby allowed the system to easily select these records and delete them. Updating the files (which should be done every one to three months) is accomplished via a simple delete/add technique. That is, all the previous records for an aggregation are deleted and a complete new set added.

In summary it is suggested that libraries:

- Load MARC records for journals in aggregator databases as separate records
- Assign these records to a specific range of record numbers that allow for easy selection, or, ensure the 773 field can be used as a selection mechanism
- Update records every one to three months to ensure data currency
- Updates are best accomplished by deleting records (select based on record number range or 773 value, then batch delete), then loading the new records.
- Do not manually adjust records

In the future, techniques may become available that will allow complete automation of merging and updating elements of aggregator MARC records in existing records. Further investigation will be done on the use of MARC21 Holdings.
records as an alternative approach (the guidelines discuss the use of Bibliographic records); however, variations in ILS systems make this approach more difficult to implement in a uniform manner.