Electronic Serials: Collaborative Management Across Departments

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Introduction

- Cleveland State University Library is a medium sized library

- Our electronic serials collection totaling 46,300 unique eJournal titles in March 2009 consists of
  - OhioLINK resources
  - local subscriptions and
  - free eJournals.

- In 2008, our system recorded over 700,000 uses of online journals and databases

Task Force Team

- We don't have a dedicated position for the task of electronic serials
- Rather, the Acquisition, Cataloging, and Automation work together on electronic journals management

Our Work

- Covers a full spectrum of library operations in providing and maintaining access to electronic journals
- Affects every area of the library, such as:
  - the initial selection process
  - license terms
  - vendor contacts
  - pricing maintaining

Our Work (2)

- – subscription renewals and cancellations
- – Order history records
- – information about publication schedules and title changes
- – bibliographic data
- – timely current information about the library eJournals holdings
- – usage statistics and management reports for collection evaluation

My Talk will discuss two issues

- How we set up licenses for electronic materials, and
- How we provide and maintain the access to these materials.

Setting Up Licenses

We are dealing with licenses to two different types of electronic resources

– New electronic resources and

– Online access to online resources with print subscriptions

New Electronic Resources

1. The Acquisition Coordinator receives requests from selectors to order new resources

2. Negotiates and processes the licenses
   1) Contacts publisher/vendor to determine:
      - price
      - number of concurrent users
      - remote access availability, and
      - license agreement

New Electronic Resources (2)

2) Receives license agreement and information from vendors and looks over license and makes notes on:

- authorized users—who are included (esp. walk-ins)

- remote access/proxy information

- usage restrictions

- ILL/copyright permission

- Warranties/indemnification clause—is it present?

New Electronic Resources (3)

- – termination
- – liability
- – usage statistics
- – governing law
- – fees
- – unresolved finding (add for CSU)

New Electronic Resources (4)

3) Sends copy with notes to the library director

4) The library director reviews license and sends to University Counsel

5) The Acquisition Coordinator receives license from the library director with acceptance/changes/signature

New Electronic Resources (5)

6) Sends revised license to publisher/vendor

7) Receives ok or notice that more changes have been made

8) For license that publisher/vendor makes changes to, repeats process of sending to the library director for legal counsel to review. Do this until an agreement is reached

9) For license that is ok, proceeds to next step

New Electronic Resources (6)

3. Contacts publisher/vendor and asks to start order

4. Receives confirmation of order with information on how to access title

5. Registers for electronic access

New Electronic Resources (7)

6. Creates order record including the following information:

– number of users

– remote access availability

– when began

– contact information

7. Forwards information to the cataloging

Online Resources with Print Subscriptions

1. The Acquisition Coordinator receives notice from vendor/publisher that online access is available free with print subscription

2. Contacts publisher/vendor and asks to start access

3. Receives information, fills out online forms. If need signed license, sends license to the library director for review (see new e-resources steps 2.4-2.9 above)

4. Sends the information to the Cataloging once the license is taken care of

Provide and Maintain Access

We provide and maintain access to electronic journals in A-to-Z list, OPAC, OLinks, Online Research Databases and WorldCat.

Because of the overwhelming workload, we use Serials Solutions' services for the maintainning of A-to-Z journals list, MARC records, and WorldCat holdings

What we do?

1. Selecting and Updating the A-to-Z journals list at Serials Solutions

2. Loading eJournal records to Local OPAC

3. Setting up OCLC eJournal holdings services to reflect CSU holdings in WorldCat

4. Adding and updating eJournals to OLinks

5. Creating and maintaining the online research databases list

1. Selecting and Updating Titles at Serials Solutions

Which include:

- OhioLINK e-resources
- Online versions of library subscribed print journals
- Local subscribed online full-text databases
- Free eJournals
- CSU print/microform journals (including most of Law Library journals)

SerialsSolutions

1-866-SERIALS (737-4257)   Your Account | Support Center & Online Community | Contact Us | Lo

e-Catalog: All Titles ▾   Title Begins With ▾   [   ]   ➡

Home > Data Management

Library Databases

| | | Create New Database | Edit Status | Show Top 25 |

Database Name	Status	Titles		Provider
Academic Search Complete	Subscribed	6788		EBSCOhost
Accessible Archives Complete	Subscribed	21		Accessible Archives
Alt-HealthWatch	Subscribed	192		EBSCOhost
American Geophysical Union	Subscribed	7 of 24		American Geophysical Union
American Library Association	Subscribed	1 of 42		American Library Association
American Mathematical Society Publications	Subscribed	9 of 19		American Mathematical Society
American Medical Association Journals	Subscribed	1 of 27		American Medical Association
American Periodicals Series	Subscribed	1530		ProQuest
American Statistical Association Publications	Subscribed	1 of 8		American Statistical Association
America's News Magazines	Subscribed	28		NewsBank
ASCE Research Library	Subscribed	31 of 34		American Society of Civil Engineers
ASME International Journals	Subscribed	16 of 26		American Society of Mechanical Engineers
Baywood Journals	Subscribed	2 of 23		MetaPress
Blackwell-Synergy	Subscribed	19 of 1116		Blackwell Publishing
Business Source Complete	Subscribed	25777		EBSCOhost
China Online Journals (COJ)	Subscribed	5982		Wanfang Data Co,. Ltd.
CINAHL Plus with Full Text	Subscribed	723		EBSCOhost

Journal Finder: Full Text Electronic Journal List – Mozilla Firefox

File   Edit   View   History   Bookmarks   Yahoo!   Tools   Help

http://da2lr8hd7w.search.serialssolutions.com/?V=1.0&N=100&L=DA2LR8HD7W&S=AC_T_B&C=GEOR   Google

Most Visited   LC Classification   cataloging   catalog   Quick Searches   organizations   Olink

Journal Finder: Full Text Electroni...   Basic Search   Data Management Home

Journal Finder : Find Online & Print Journals

Journal Finder is a research tool to help you find out which journals, periodicals, magazines, newspapers, & newsletters the Library has in its print or online collections.

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Title begins with ▼ [   ]   Search
– Please select a subject category – ▼   Search

61 records retrieved for the search: Title begins with "GEOR"

George Herbert journal (0161-7435)
    from 2006 to present in OhioLINK Electronic Journal Center

George Mason independent law review (1068-3801)
    from 1992 to 1995 in HeinOnline Law Journal Library
    from 1992 to 1995 in Westlaw Journals and Law Reviews   Law School password
    login only
    from 04/01/1993 to present in LexisNexis Academic
    from 1992 to 1995 in Library's print journals
    from 1995 to present in Library's print journals

George Mason law review (1088-5625)
    from 1995 to present in Westlaw Journals and Law Reviews   Law School
    password login only
    from 1995 to 2008 in HeinOnline Law Journal Library

2. Adding eJournals to Local OPAC

- Once we receive the e-mail information from Serials Solutions on available MARC records for eJournals

- Batch loading MARC records into local OPAC

- These MARC records include the two features: access points control and metadata control

Access Points Control

- Comprehensive and Standardized description: We select CONSER MARC records and machine created brief supplements with customized options to get comprehensive eJournal records into OPAC

- Single record representation: Aggregates all electronic holdings into a single online record

Access Points Control (2)

- License restrictions: IP access, Walk-in use; Remote access

- Authentication method: Add a local note to the record how many concurrent users, proxy, profix on the URL, etc.

Access Points Control (3)

- Usability: Accessibility; Search capabilities; Results display; Document quality; Output options; Server performance: How users can get the best results for their searches, etc.

- Technical requirements: Fonts; Plug-ins; Browser versions or settings;

- Proxy interaction: What records the users will see on their computer screen, etc.

Metadata Control

- content: Volatile content; Impermanence; Instability
- functionality
- publisher
- title
- URL checking
- preservation
- location
- versions
- services
- problems in authentication and attribution

Message   Insert   Options   Format Text

Calibri   11   A A   Aa

B I U   A   A

Paste   Cut   Copy   Format Painter

Clipboard   Basic Text   Address Check   Attach Attach Business Calendar Signature   Follow   Spelling
                        Book Names   File Item Card   Up
                        Names   Include   Options   Proofing

Send   To...
        Cc...
        Subject:

From: SEA-Reports [mailto:SEA-Reports@serialssolutions.com]
Sent: Thursday, September 11, 2008 6:45 PM
To: b.gauthier@csuohio.edu; y.s.yang@csuohio.edu; b.jeppesen@csuohio.edu
Subject: 360 MARC Update: September 2008

Hello,

The latest records for your 360 MARC Updates are now available in your folder at the ftp site ftp.serialssolutions.com.

Your login is: Cleve
Your password is: CHR

You can also access this site through a web browser using the following URL:

ftp://CleveStUniv:CHR@ftp.serialssolutions.com

This update does not completely replace previous records; instead, it provides new records, updated records, and indicates which records should be delete
Records that do not need to be changed are not included in this report.

If you have questions, comments or improvements, please feel free to contact us by email (clients@serialssolutions.com) or telephone (1-866-737-4257 ext

Sincerely,
Serials Solutions

File   Edit   View   Go   Tools   Admin   Reports   Window   Help

Data Exchange

View   Copy   Delete   Get FTS   Get PC   Prep   Load L   Load 0   Load D   Load N

Select Process Load Records via Local Profiles (local) ▼

File	Name	Type	Size	Last Modified
1	1-Brief-CleveStUniv_MARC_2009_03...	errlog	1578	03-10-2009 8:49AM
2	1-Brief-CleveStUniv_MARC_2009_03...	lfts	4188489	03-10-2009 8:39AM
3	1-Brief-CleveStUniv_MARC_2009_03...	lmarc	5105408	03-10-2009 8:49AM
4	1-Chng-CleveStUniv_MARC_2009_0...	errlog	1534	03-10-2009 11:30AM
5	1-Chng-CleveStUniv_MARC_2009_0...	lfts	7004399	03-10-2009 11:21AM
6	1-Chng-CleveStUniv_MARC_2009_0...	lmarc	7423488	03-10-2009 11:30AM
7	1-Del-CleveStUniv_MARC_2009_03_...	errlog	1512	03-10-2009 11:40AM
8	1-Del-CleveStUniv_MARC_2009_03_...	lfts	599132	03-10-2009 11:21AM
9	1-Del-CleveStUniv_MARC_2009_03_...	lmarc	641024	03-10-2009 11:40AM
10	1-New-CleveStUniv_MARC_2009_03...	errlog	1512	03-10-2009 11:41AM
11	1-New-CleveStUniv_MARC_2009_03...	lfts	350777	03-10-2009 11:22AM
12	1-New-CleveStUniv_MARC_2009_03...	lmarc	376576	03-10-2009 11:41AM
13	2-Brief-CleveStUniv_MARC_2009_03...	errlog	1578	03-10-2009 9:20AM
14	2-Brief-CleveStUniv_MARC_2009_03...	lfts	4191022	03-10-2009 8:39AM
15	2-Brief-CleveStUniv_MARC_2009_03...	lmarc	5089024	03-10-2009 9:20AM
16	3-Brief-CleveStUniv_MARC_2009_03...	errlog	1578	03-10-2009 9:39AM
17	3-Brief-CleveStUniv_MARC_2009_03...	lfts	4168236	03-10-2009 8:40AM
18	3-Brief-CleveStUniv_MARC_2009_03...	lmarc	5076480	03-10-2009 9:39AM
19	4-Brief-CleveStUniv_MARC_2009_03...	errlog	1916	03-10-2009 9:56AM
20	4-Brief-CleveStUniv_MARC_2009_03...	lfts	3019764	03-10-2009 8:40AM
21	4-Brief-CleveStUniv_MARC_2009_03...	lmarc	3704064	03-10-2009 9:56AM

Millennium

Catalog

Global Update

Rapid Update

Create Lists

Delete Records

Delete Items

Headings Rpts

Statistics

Data Exchange

File Edit View Go Tools Window Help

Insert Save View Edit Summary Browse Verify Export Print

b18254639   Last Updated: 08-18-2008   Created: 05-04-2004   Revisions: 22

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i	022	0	1050-0545|24	
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i	032		010465|bUSPS	
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y	040		NSDP|cNSDP|dNST|dMiU|dNST|dDNLM|dGU|dOUCA|dNSDP|dWaU|dCaOONL|dNSDP|dOCoLC|dPSt|dOCoLC|dGU|dInU|dOCoLC|dCU-S|dWaSeSS	
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r	310		Ten times a year,|b<May/June 2003->	
r	321		Quarterly,|b1990-	
r	321		Bimonthly,|b<1992>-1998	
r	321		Monthly (except bimonthly in July/Aug. and Nov./Dec.),|b1999-2002	
r	321		Eight times a year,|b2003-	
r	362	0	Vol. 1, no. 1 (Jan. 1990)-	
n	500		Title from cover	

File Edit View Go Tools Window Help

Insert	Save	View	Edit	Summary	Browse	Verify	Export	Print

b22795212   Last Updated: 04-06-2009   Created: 12-29-2008   Revisions: 9

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y	008		090308u s d	
i	022		0090-8738	
y	040		WaSeSS|cWaSeSS|dWaSeSS	
c	099		|b(INTERNET)	
t	130	0	Journal of the Bromeliad Society (Online)	
t	245	1 0	Journal of the Bromeliad Society|h[electronic resource]	
n	506		Access restricted to Cleveland State University users	
j	655	0	Electronic journals	
b	710	2	Thomson Gale (Firm)	
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http://proxy.ulib.csuohio.edu:2050/login?url=http://infotrac.galegroup.com/itw/infomark/1/1/1/purl=rc18%5fEAIM%5F0%5F%5Fjn+%22Journal+of+the+Bromeliad+Society%22?sw_aep=clev91827|zFull text available from Expanded Academic ASAP: 01/01/2007 to present

Scholar

The Libraries of Cleveland State University

SCHOLAR HOME | COURSE RESERVES | MY ACCOUNT | RENEW MATERIALS | LIBRARY INFORMATION | SUGGESTION BOX | HELP!

Start Over   Save Citation   MARC Display   Return to List   Limit / Sort Search   Another Search   OhioLINK   (Search History)

TITLE   JOURNAL OF THE   System Sorted   Search

☐ Limit to items which are not checked out

Record: Prev Next

Unif Title	Journal of the American Academy of Audiology (Online)
Title	**Journal of the American Academy of Audiology [electronic resource]**
Publisher	Burlington, Ont. : Decker, c1990-

| Connect to |
| Full text available from Academic Search Complete: 01/01/2001 to 11/30/2002 |
| Full text available from Health Source: Nursing/Academic Edition: 01/01/2001 to 11/30/2002 |
| Full text available from Sociological Collection: 01/01/2001 to 11/30/2002 |

BOOKMARK
Permalink

| **Copy Status** | **Find Similar Items** | **Full Record** | Print Version

Pros

- Serials Solutions provides monthly updates of MARC records for all of our e-journals. This ensures that we have a complete and centralized record of our journals collection.

- Patrons then can use our OPAC's search functions to find specific journals and link to both print and electronic resources anywhere in our collection.

- Wherever patrons start their search — A-to-Z list or OPAC — they can receive consistent results no matter which entry point they choose.

- Customization options are ensuring records meet local specifications.

Cons

- Brief supplements records do not have subject headings.

- Changes to MARC records do not take place immediately, rather with delay of about month.

3. Setting up eJournals holdings with OCLC

- Setting up OCLC e-journal holdings services to reflect CSU holdings in WorldCat

- Automate the process of setting and maintaining our eJournal holdings information in WorldCat without adding to our cataloging workload

- eJournal Holdings is the key to let other libraries know exactly what we have available for interlibrary loan.

Message

Reply | Reply to All | Forward | Delete | Move to Folder | Create Rule | Other Actions | Block Sender | Not Junk | Safe Lists | Follow Up | Mark as Unread | Find | Related | Select

Respond | Actions | Junk E-mail | Options | Find

Links and other functionality have been disabled in this message. To restore functionality, move this message to the Inbox.

From: BatchServices@oclc.org
To: y.s.yang@csuohio.edu
Cc:
Subject: ESerials Post Processing Notification For CSU

Please visit OCLC's Product Services Web to pick up any associated records and/or reports.

http://psw.oclc.org/

Find them under Records and their Associated Reports -> OCLC eSerials Holdings Service records and reports.

If you have any questions, please contact the OCLC Database Specialist assigned to your project, or your OCLC regional service provider.

FirstSearch: WorldCat List of Records - Mozilla Firefox

File   Edit   View   History   Bookmarks   Yahoo!   Tools   Help

http://newfirstsearch.oclc.org/WebZ/FSQUERY?format=BI:next=html/records.html:bad=html/records.html:num   G · Google

Most Visited   LC Classification   cataloging   catalog   Quick Searches   organizations   Olink

CSU Cleveland State University Libraries   ⊠   FirstSearch: WorldCat List of Rec... ⊠   Data Management Home   ⊠

Subjects Authors   Records found: 5 Rank by: **Number of Libraries**

◀   1   ▶
Prev   Next

All | Internet | Serials | Books
5 | 🌐 3 | 📚 1 | 💎 1

Limit results: Any Audience ▾ | Any Content ▾ | Any Format ▾ | **Search**   ❓

☐ 1. 🌐 **Journal of the American Academy of Audiology**
➡ http://eproxy.lib.hku.hk/login?url=http://search.epnet.com/direct.asp?db=aph&jn="9OC"&scope=site
Publication: Boston, Mass. : EBSCO Pub. 1900s-
Document: English : Internet Resource 📚 Serial Publication
Libraries Worldwide: 314 🔖 **Cleveland State University Library**
More Like This: Advanced options ...

☐ 2. 📚 **Journal of the American Academy of Audiology.**
Publication: Burlington, Ont. : Decker, 1990-
Document: English : Serial Publication : Periodical : Monthly 🌐 Internet Resource
Libraries Worldwide: 201
More Like This: Advanced options ...
🖥 See more details for locating this item

☐ 3. 🌐 **Journal of the American Academy of Audiology**
➡ http://search.epnet.com/direct.asp?db=aph&jid=%229OC%22&scope=site
Publication: Burlington, Ont. : Decker, 1990-
Document: English : Internet Resource 💾 Computer File 📚 Serial Publication
Libraries Worldwide: 47
More Like This: Advanced options ...

☐ 4. 🌐 **Journal of the American Academy of Audiology : JAAA**
➡ http://www.bibliothek.uni-regensburg.de/ezeit/?2069736
➡ http://www.audiology.org/publications/jaaa/
➡ http://search.ebscohost.com/
Publication: Resten, Va. Acad. 1990, ©9999
Document: English : Internet Resource 💾 Computer File 📚 Serial Publication
Libraries Worldwide: 1
More Like This: Advanced options ...

4. Adding and updating eJournals to OLinks

- Create a spreadsheet by using eJournals list from Serials Solutions

- Delete all OhioLINK resources and the eJournals without ISSN numbers

- Change the link level from journal to article if it is provided by publisher

- Submit the updated list to OLinks monthly

- Using Olinks, student and faculty researchers can more easily take advantage of the many resources provided by OhioLINK and the CSU Libraries.

Wilson Web

Interface Language   **Quick Links**

Library Default ▾   Journal Directory

| BASIC SEARCH | ADVANCED SEARCH | BROWSE | THESAURUS | SEARCH HISTORY | PRINT EMAIL SAVE | EXPORTING / CITING |

Search Results:

486833 Records found for education <in> Smart Search

In **Education Full Text**

📝 MODIFY SEARCH   ✉ CREATE ALERT   📶 RSS FEED   🅿 LINK TO SEARCH

Find:

[   ] 🔍

◉ Search Within Results   ○ New Search

| ALL RESULTS | FULL TEXT | FULL TEXT PDF | PEER REVIEWED | NON-PEER REVIEWED |

CONTENT DISCOVERY KEYS   0 marked records: Get Marked | Clear Marks

Sort by: Relevance ▾   Records: 10 per Page

New Search By Subject

View: Brief Display | Full Display

Page: **1** 2 3 4 5 ▸

Education

Gifted / Education

Computers / Educational use / Private schools

Internet / Distance education use / Private schools

Teacher education in service / Administration

Leadership in education

Private schools / Administration

Readership surveys

Narrow These Results

▸ **By Author**

100% ☐ 1   Milne, P. The Myths That Stir Our Fury. *Educational* Leadership v. 60 no. 8 (May 2003) p. 93

📄 Full Text HTML   📄 Full Text PDF   **SCHOLAR** Library Owns   Find It! OLinks?   📁 Save to My WilsonWeb

100% ☐ 2   Drummond, S., et. al., Flashback [photos illustrating important events in *education*]. *Teacher Magazine* v. 11 no. 1 (August/September 1999) p. 68-71

SCHOLAR Library Owns   Find It! OLinks?   📁 Save to My WilsonWeb

100% ☐ 3   Jones, A. H., et. al., Readers comment on *education* [results of survey]. *The Education* Digest v. 55 (September 1989) p. 40-1

SCHOLAR Library Owns   Find It! OLinks?   📁 Save to My WilsonWeb

100% ☐ 4   Jones, A. H., et. al., Readers comment on *education*. *The Education* Digest v. 54 (September 1988) p. 41-2

SCHOLAR Library Owns   Find It! OLinks?   📁 Save to My WilsonWeb

100% ☐ 5   Resnick, L. B. Learning in school and out [the 1987 Presidential address]. *Educational Researcher* v. 16 (Decemb...

5. Creating and maintaining the Online Research Databases list

- E-mail the Automation, which is in charge of databases list, to
  - Update the Online Research Databases list, and
  - Add the database to the EZproxy server

Alphabetical List of Research Databases

Overwhelmed by all these databases? Not sure which one to use or how to use it? Try starting with Finding Journals & Articles. You can also Ask a Librarian for help.

Use "tabless version" of page.

| A | B-C | D-F | G-H | I | J-M | N-P | R-S | T-V | W |

:: **Abstracts in Anthropology**: Covers a broad spectrum of significant, current anthropological topics from a vast number of periodicals, providing a thorough coverage of anthropological scholarship in all its subfields, cultural anthropology, physical anthropology, archaeology and linguistics.

:: **Academic Search Complete** (1984-): Index, abstracts, and full text for many scholarly publications covering all academic areas of study. VIDEO HELP

:: **Accessible Archives** (1728-1870-): Provides the full text of articles from more than a dozen American newspapers and magazines from the 18th-19th centuries.

:: **ACM Digital Library** (1947-): Full text of journal and conference papers from the Association for Computing Machinery.

:: **ACS Publications** (American Chemical Society) (1879-): Archive of pre-1996 journals from the American Chemical Society.

:: **AGRICOLA** (1970-): Consists of over 2.5 million citations to journal articles, monographs, theses, patents, software, audio-visual materials, and technical reports and encompasses all aspects of agriculture and allied disciplines.

:: **Alt-Health Watch** (1978-): Index, abstracts, and full text covering complementary, holistic and integrated approaches to health care and wellness.

The updating steps depend on the types of database changes

- For platform/aggregator eJournal databases whose providers have been changed or whose status have been changed from abstract only to full-text, add or update them on Serials Solutions Client Center. Serials Solutions will take care of the A-to-Z Journals list, MARC records and WorldCat holdings.

- For single eJournals not covered by databases, add them in Serials Solutions Client Center and Serials Solutions will do all other works.

- For coverage dates change, or titles are added and dropped, Serials Solutions will update all for us.

- For cancelled databases/eJournals, update coverage dates if there is an archive access; withdraw records if they are for electronic resource only.

In addition, we do the following to provide & maintain our eJournals access

- Creating two lists, new eJournals and deleted eJournals, and sending the lists to the Reference team monthly.
- Reporting unique eJournals statistics to the administration monthly.
- Troubleshooting access problems which are reported through phone calls from users, or references.
- Correcting broken URLs.
- Updating every lists when there are resource content changes, title changes, renewals, cancellations.
- We are working on a local ERM based on our local needs.