Electronic Serials: Collaborative Management Across Departments

Yuezeng Shen
Head of Cataloging, Cleveland State
University

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

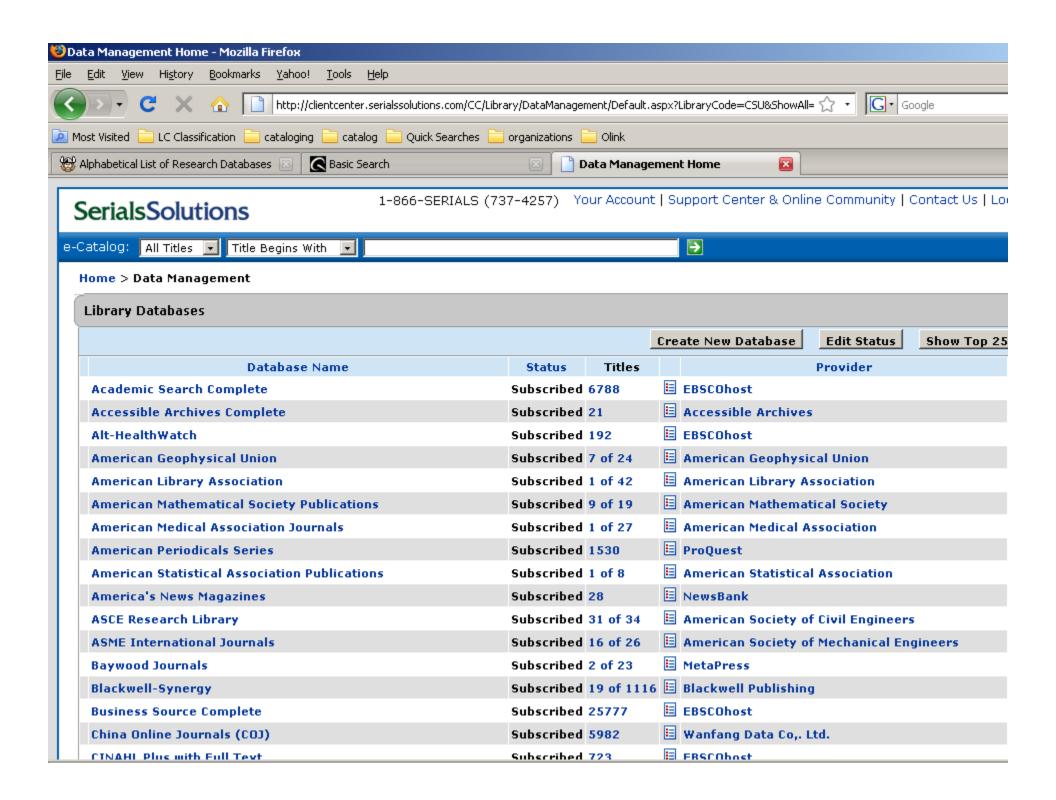
What we do?

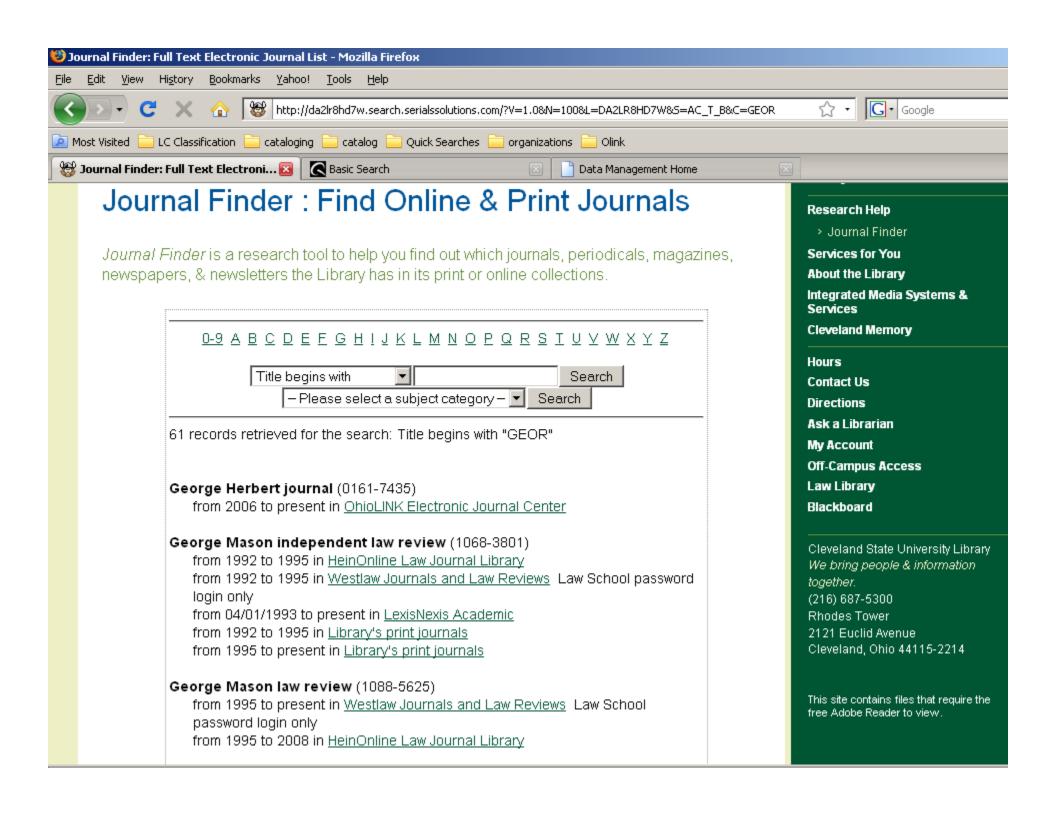
- 1. Selecting and Updating the A-to-Z journals list at Serials Solutions
- 2. Loading eJournal records to Local OPAC
- 3. Setting up OCLC eJournal holdings services to reflect CSU holdings in WorldCat
- 4. Adding and updating eJournals to OLinks
- Creating and maintaining the online research databases 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)





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)

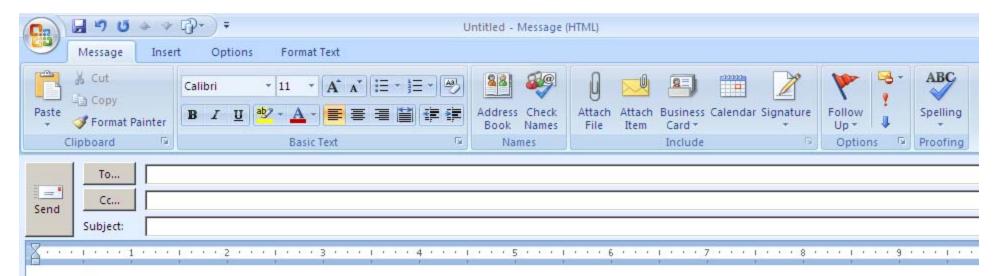
- License restrictions: IP access, Walk-in use;
 Remote access
- Authentication method: Add a local note to the record how many concurrent users, proxy, profix on the URL, etc.

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



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



Millennium Cataloging · Cleveland State University Libraries · Yuezeng Shen

File Edit View Go Tools Admin Reports Window Help

Data Exchange











Prep



















Global Update



Rapid Update



Create Lists



Delete Records



Delete Items



Headings Rpts



Statistics



Data Exchange

Select Process Load Records via Local Profiles (local)

	-Brief-CleveStUniv_MARC_2009_03			
2 1		erriog	1578	03-10-2009 8:49AM
	-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

b18254639 File Edit View Go Tools Window Help 1 H Q Ø Insert Save Summary Browse Verify Export Print b18254639 Last Updated: 08-18-2008 Created: 05-04-2004 Revisions: 22 LANG eng English COPIES MAT TYPE s PERIODICAL SKIP 0 CAT DATE 06-18-2008 BCODE3 z LOC, NO CENT LOCATION UZ University BIB LVL s SERIAL COUNTRY onc Ontario #####cas 22#### a 4500 MARC Leader 1ssj0007931 001 WaSeSS 003 20080807180049.0 005 У 006 m d 007 cr n у 800 900418c19909999oncmx p s 0 a0eng d 010 sn 90004239 |zcn 96390030 |zcn 00301640 022 0 1050-0545 24 030 JAAAE3 032 010465 bUSPS 037 bAmerican Academy of Audiology, 11730 Plaza America Drive, Suite 300, Reston, VA 20190 040 NSDP|cNSDP|dNST|dMiU|dNST|dDNLM|dGU|dOUCA|dNSDP|dWaU|dCaOONL|dNSDP|dOCoLC|dPSt|dOCoLC|dGU|dInU|dOCoLC|dCU-S|dWaSeSS 050 RF286 b(INTERNET) C 055 0 6 PER.REG.1996.418 060 0 0 W1|bJ0907VK 082 1 0 617 211 Journal of the American Academy of Audiology (Online) 130 0 210 0 J. Am. Acad. Audiol u 222 Journal of the American Academy of Audiology 245 0 0 Journal of the American Academy of Audiology|h[electronic resource]

246 1 3 JAAA

260

300 310

321

321

321

321

500

362 0

Burlington, Ont.: bDecker, cc1990-

Ten times a year, b<May/June 2003->

Monthly (except bimonthly in July/Aug. and Nov./Dec.), b1999-2002

v. : bill. ; c28 cm

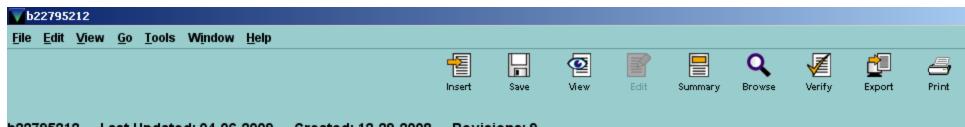
Quarterly, b1990-

Title from cover

Bimonthly, b<1992>-1998

Eight times a year, b2003-

Vol. 1, no. 1 (Jan. 1990)-

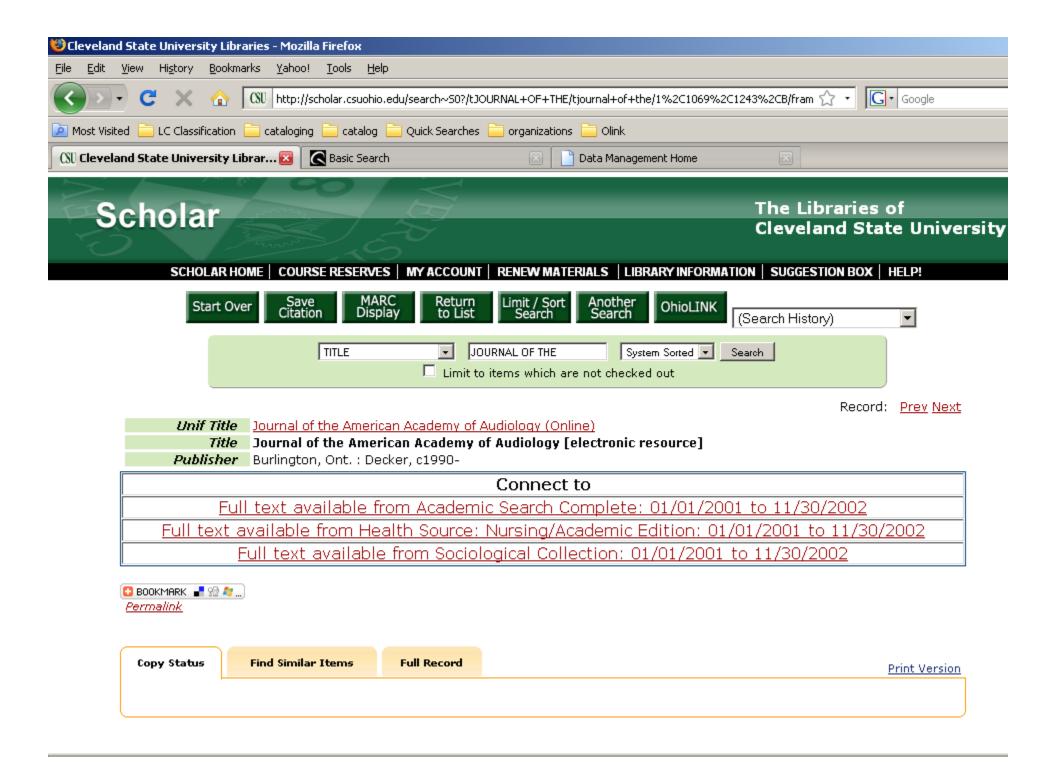


b22795212	Last Updated: 04-06-2009	Created: 12-29-2008	Revisions: 9
-----------	--------------------------	---------------------	--------------

LANG		COPIES	1	MAT TYPE	s PERIODICAL
SKIP	0	CAT DATE	02-12-2009	BCODE3	z LOC, NO CENT
LOCATION	uz University	BIB LVL	s SERIAL	COUNTRY	

MARC Leader			er	#####nas 22#####3u 4500
0	001			1ssjb209871
У	003			WaSeSS
у	005			20090308224521.0
у	006			m d
У	007			cr n
у	800			090308u s d
i i	022			0090-8738
у	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)
у	856	4	0	ļu —
				http://www.ulib.com.bis.cdu/2050.tomin2.rd_bttp://infetro.c

http://proxy.ulib.csuohio.edu:2050/login?url=http://infotrac.galegroup.com/itw/infomark/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



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.



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;

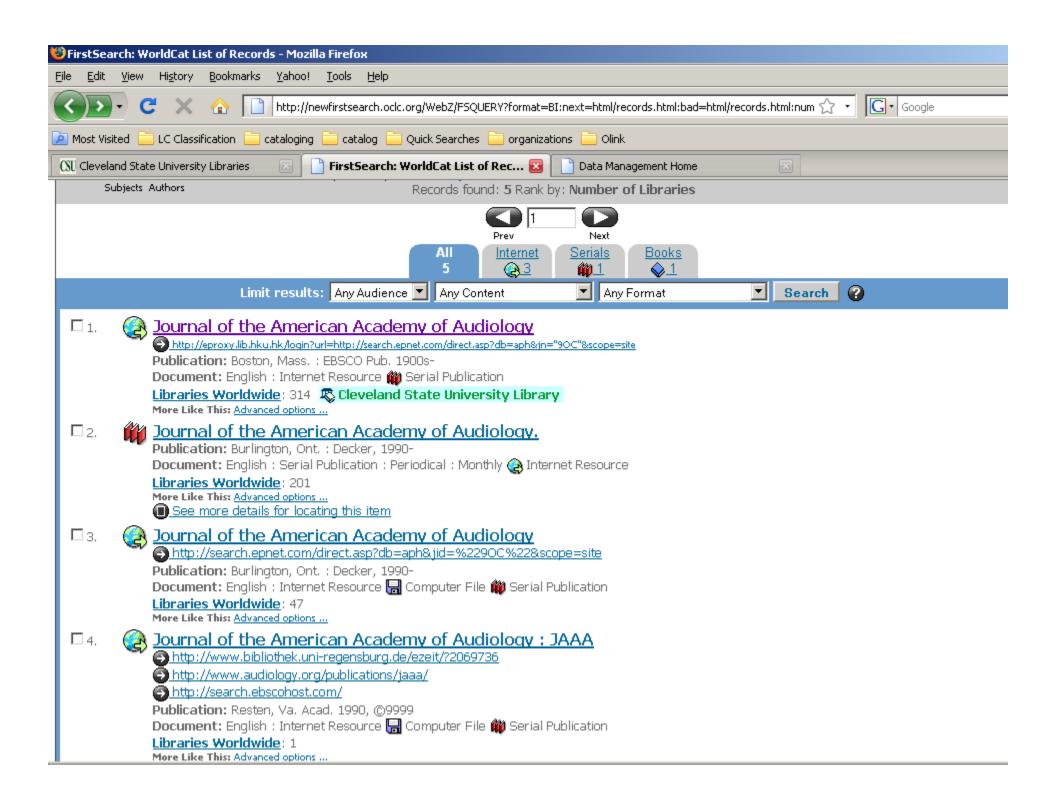
Subject: ESerials Post Processing Notification For CSU

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

http://psw.oclc.org/

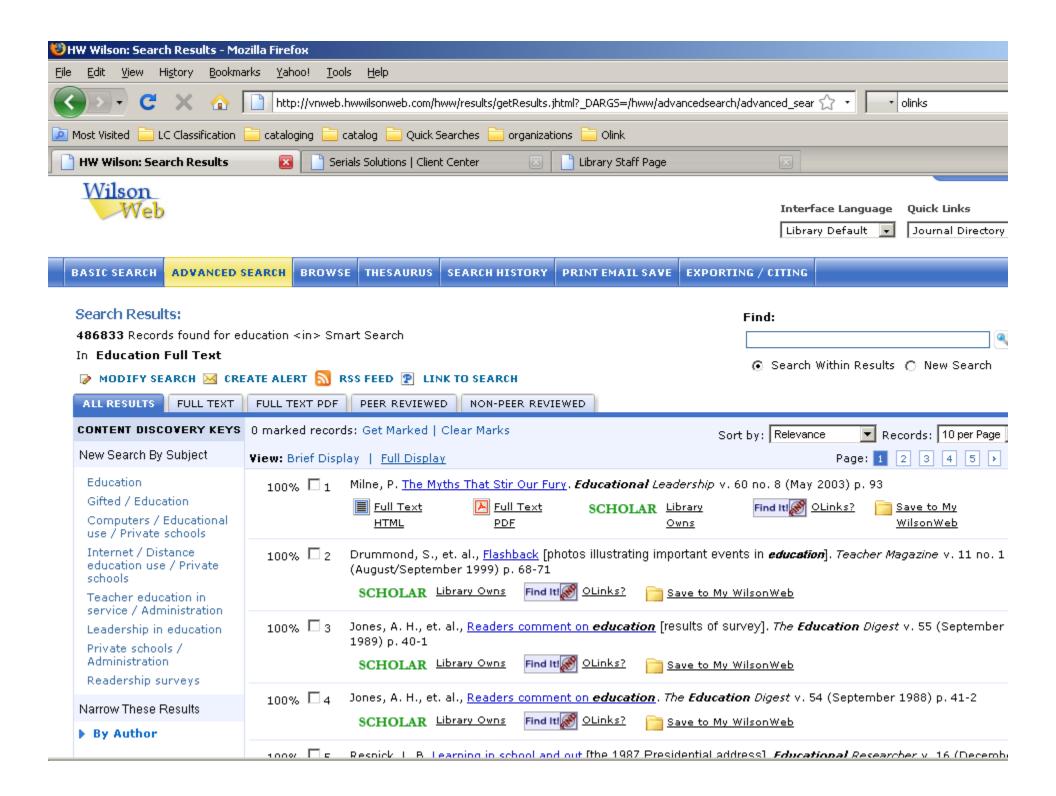
Find them under Records and their Associated Reports -> OCLC eSerials Holdings Service records and reports.

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



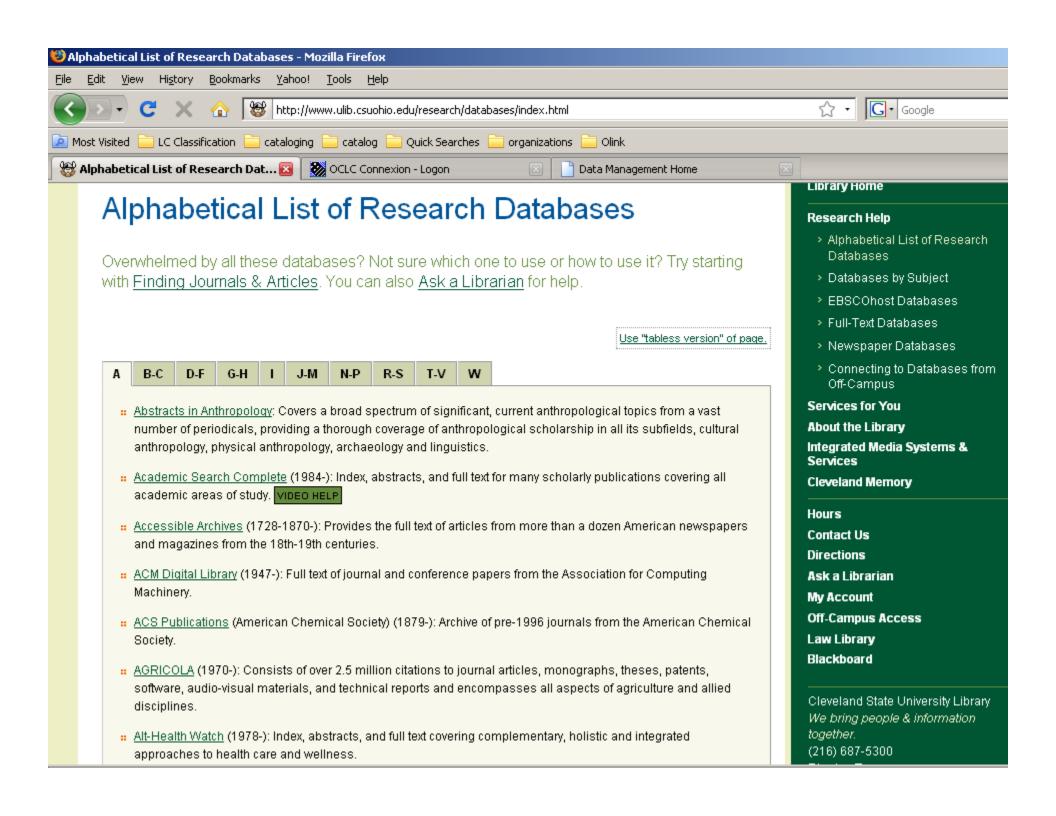
4. Adding and updating eJournals to OLinks

- 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.



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



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.