Knitting Together a Comprehensive eBook Record Strategy

Lynn E. Gates
Kraemer Family Library
University of Colorado Colorado Springs

#IUG2019

IUG2019 Phoenix, AZ

Sunday, May 5th | Pre-Conference
Monday, May 6th – Wednesday, May 8th | Main Conference

Create Your Pattern

Know Your System

- Do you have a PAC or a discovery layer or both? How are records displayed in each?
- Can your vendor interface directly with your OPAC?
- Do you need to add proxy statements to URLs?
- Are there changes coming to your system that may affect record loading/maintenance?
- Why are you loading records? for user access? for inventory purposes?

How Do You Get Your eBooks?

- Purchased Packages
- Subscription Packages
- PDA/DDA/ATO
  - Discovery
  - Purchased
- Open Access Titles
  - Single-title
  - Packages
- Single-title Purchases

Are You Provider Neutral?

What is Provider Neutral?

- “a single bibliographic record that describes all manifestations of an online resource regardless of which content publisher or aggregator is making the manifestation available.” (Provider-Neutral 2017)
- “[puts] the emphases on the content of the resource rather than on the provider.” (Culbertson, Mandelstam, and Prager 2011

In other words, one record for one title with potentially lots of links.

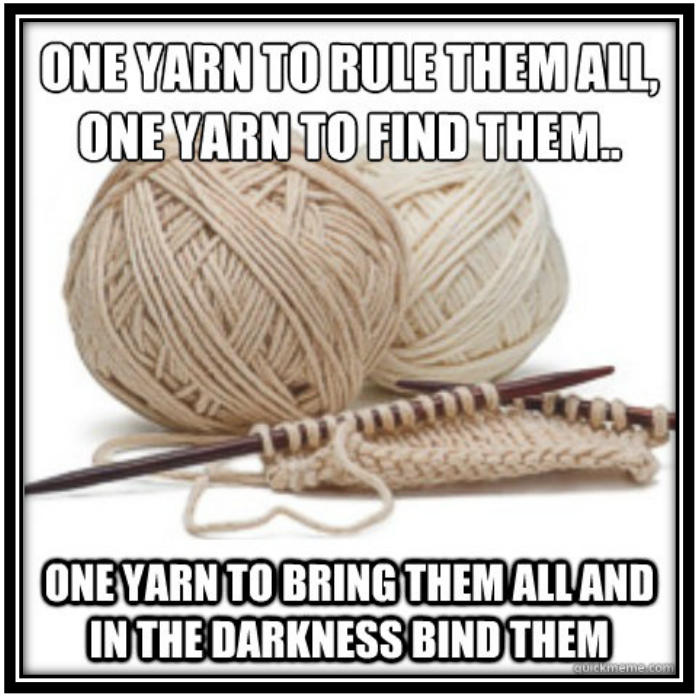
Provider Neutral: Pros & Cons

Advantages

- Reduces duplicate records
- Less confusion for users
- Information is in one place

Disadvantages

- Requires 100% reliable matchpoint
- Staff time to maintain
- Statistics gathering



Provider Neutral: Example

PNR MARC Record

```
LEADER 00000cam a2200541Ia 4500
001    463291669
003    OCoLC
005    20180622073746.9
006    m     o  d
007    cr cnu|||||||
008    091002s2007    ne a    ob    001 0 eng d
019    212778900|a228148550|a319430621|a648349416|a712977655|a961846863|a988674356|a999479713|a1030254613
020    9780080558318
020    0080558313
020    |z9780123742742
020    |z0123742749
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040    L6G|beng|epn|cLGG|dN$T|dYDXCP|dUMI|dCEF|dE7B|dOCLCQ|dNMH|dOCLCQ|dB24X7|dDEBSZ|dOCLCQ|dVLB|dOCLCF|dOCLCQ|dVLB
       |dKNOVL|dZCU|dKNOVL|dOPELS|dCOO|dOCLCQ|dVT2|dSTF|dOCLCQ|dUAB|dLIP|dLIV|dOCLCQ|dDGH
041 1  eng|hger
049    COXA
050  4 TA168|b.W43413 2007eb
100 1  Weilkiens, Tim.
240 10 Systems Engineering mit SysML/UML.|lEnglish
245 10 Systems engineering with SysML/UML|h[electronic resource] :|bmodeling, analysis, design /|cTim Weilkiens.
260    Burlington, Mass. :|bMorgan Kaufmann,|c©2007.
300    1 online resource (xi, 307 pages) :|billustrations.
336    text|btxt|2rdacontent
337    computer|bc|2rdamedia
338    online resource|bcr|2rdacarrier
490 0  The OMG press
504    Includes bibliographical references and index.
505 0  Ch. 1. Introduction -- Ch. 2. The Pragmatic SYSMOD Approach -- Ch. 3. UML -- Unified Modeling Language -- Ch.
       4. SysML -- The Systems Modeling Language -- Ch. 5. Systems Engineering Profile -- SYSMOD.
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588 0  Print version record.
650  0 Systems engineering.
650  0 SysML (Computer science)
650  0 UML (Computer science)
655  7 Electronic books.|2local
776 08 |iPrint version:|aWeilkiens, Tim.|sSystems Engineering mit SysML/UML. English.|tSystems engineering with SysML/UML.
       |dAmsterdam ; Boston : Morgan Kaufmann OMG Press/Elsevier, ©2007|z9780123742742|z0123742749|w(DLC)  2007047004
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PNR WebPAC

Author Weilkiens, Tim.

Standard Ti Systems Engineering mit SysML/UML. English

Title **Systems engineering with SysML/UML [electronic resource] : modeling, analysis, design / Tim Weilkiens.**

Publisher Burlington, Mass. : Morgan Kaufmann, ©2007.

Format Digital Media

Click on the following to:
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view eBook at ScienceDirect

Copies

Description 1 online resource (xi, 307 pages) : illustrations.

Series The OMG press

Bibliog. Includes bibliographical references and index.

Contents Ch. 1. Introduction -- Ch. 2. The Pragmatic SYSMOD Approach -- Ch. 3. UML -- Unified Modeling Language -- Ch. 4. SysML -- The Systems Modeling Language -- Ch. 5. Systems Engineering Profile -- SYSMOD.

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Note Print version record.

Subject Systems engineering.
SysML (Computer science)
UML (Computer science)

Genre Electronic books. local

Link Print version: Weilkiens, Tim. Systems Engineering mit SysML/UML. English. Systems engineering with SysML/UML. Amsterdam ; Boston : Morgan Kaufmann OMG Press/Elsevier, ©2007 9780123742742 0123742749 (DLC) 2007047004 (OCoLC)179799944

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0080558313
9780123742742
0123742749

Permalink http://library.uccs.edu/record=b2317271

Gather Your Materials

What Are Your Record Sources?

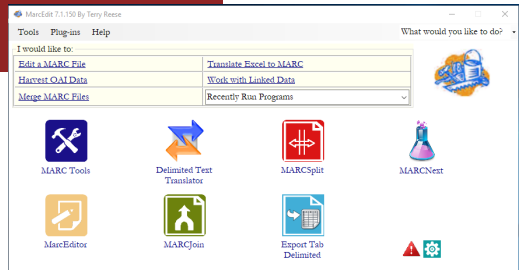
- Vendors
- Knowledge Base (like Serials Solutions or WMS Collection Manager)
- Individual download from a bibliographic utility (aka OCLC or Skyriver)
- Manually created in ILS

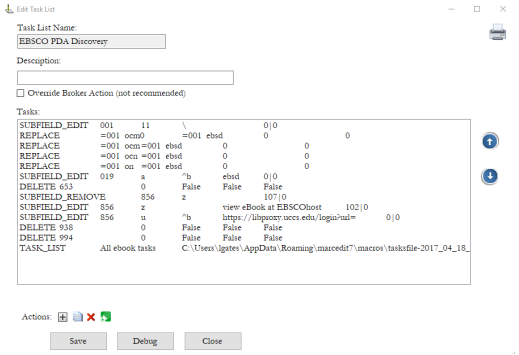
Tools for Batch Modifying Records

- MarcEdit
  - https://marcedit.reeset.net/
- OCLC WMS Collection Manager
  - Contact OCLC, included in cataloging subscription
- MARCrecord-set-wrangler
  - https://github.com/UNC-Libraries/MARC-record-set-wrangler

MarcEdit

- Allows batch editing of a file
- Create task lists
- RDA Helper
- Delimited text translator and export
- File manipulation (split, join, sort, etc.)
- MARC Validator
- And lots, lots more





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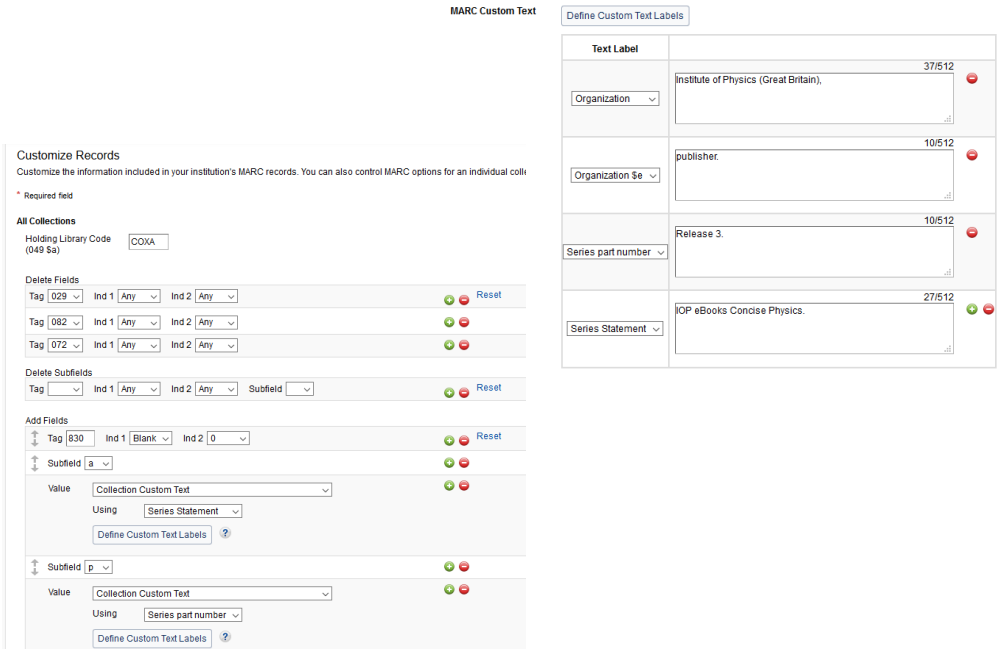
OCLC WMS Collection Manager

- Manage eBook collections
- Create custom collections
- Customize records by adding or deleting fields, but customization is on every record in a collection



MARCrecord-set-wrangler

- Work at the institution, workflow, or collection level
- Compare files of MARC records to create mini files of new, updated, merged, and deleted records
- Check information such as language of cataloging or lack of standard fields
- Manipulate fields, like the 019 to make overlaying more reliable
- Add MARC fields to records
- Treat fields under authority control flexibly
- And lots, lots more

Prepare to Cast On

Prepare Your System

- Do you need different load profiles?
- Do you need new locations? item types? statuses?
- Set-up bibliographic & item templates
- Test your set-up

Common Record Edits Ideas 1

Add a prefix and/or suffix to the control number

- Prevent unwanted overlays
- Quickly identify the vendor and/or package
- Compile records in system searches
- Designate special statuses:
  - PDA discovery or purchase

Common Record Edits Ideas 2

- Remove subject headings not used by the library
  - MESH
  - 653
  - 65X that have |2 bisach, swd, etc
  - The various versions of Electronic books (and add a standardized one)
- Remove other fields that are not relevant:
  - 506's (access information) for other libraries
  - 015, 037 $boverdrive (if not an Overdrive record), 084, 938, 994

Common Record Edits Ideas 3

- Run RDA helper in MarcEdit
  - Add or remove GMDs
  - Add RDA fields
- Add eb to the end of the call number to prevent duplicate call numbers
- Replace common errors
  - double quotes in table of contents notes
  - Incorrect 006s

Common Record Edits Ideas 4

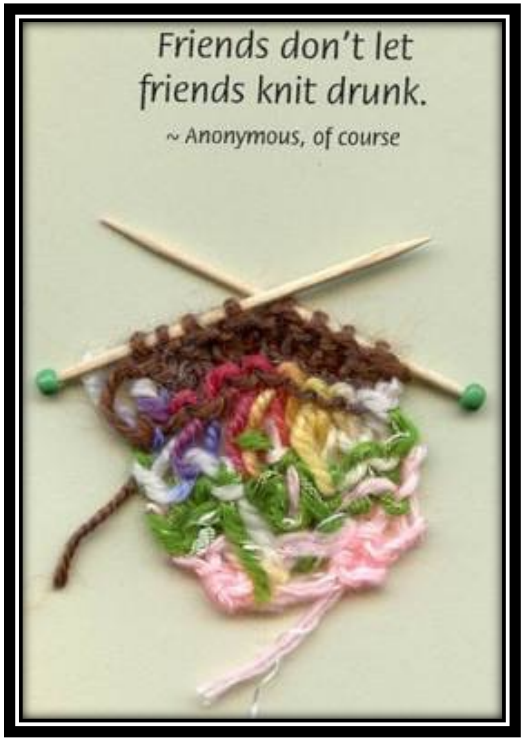
Information for your users

- Number of licenses
  - Single user, unlimited, etc.
- Public performance rights statements for streaming video
- Standardized series or authors to make search more reliable
- Link notes (856|z) that include the platform

Common Record Edits Ideas 5

Information for other departments (particularly acquisitions):

- Marking purchased vs discovery
- Funding type or other indication if permanent or subscription
- License expiration statements for streaming video



Too Many Stitches?

Duplicate Records

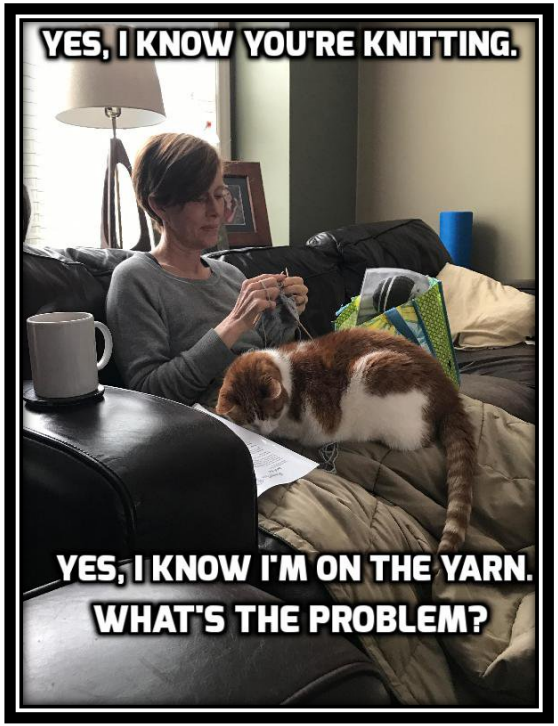
If you subscribe or purchase more than one large package that are not publisher based, you will have duplicate records as there will be titles available from multiple vendors.

Are duplicate records really a problem? Maybe, maybe not, it's going to depend on your system, set-up and users.

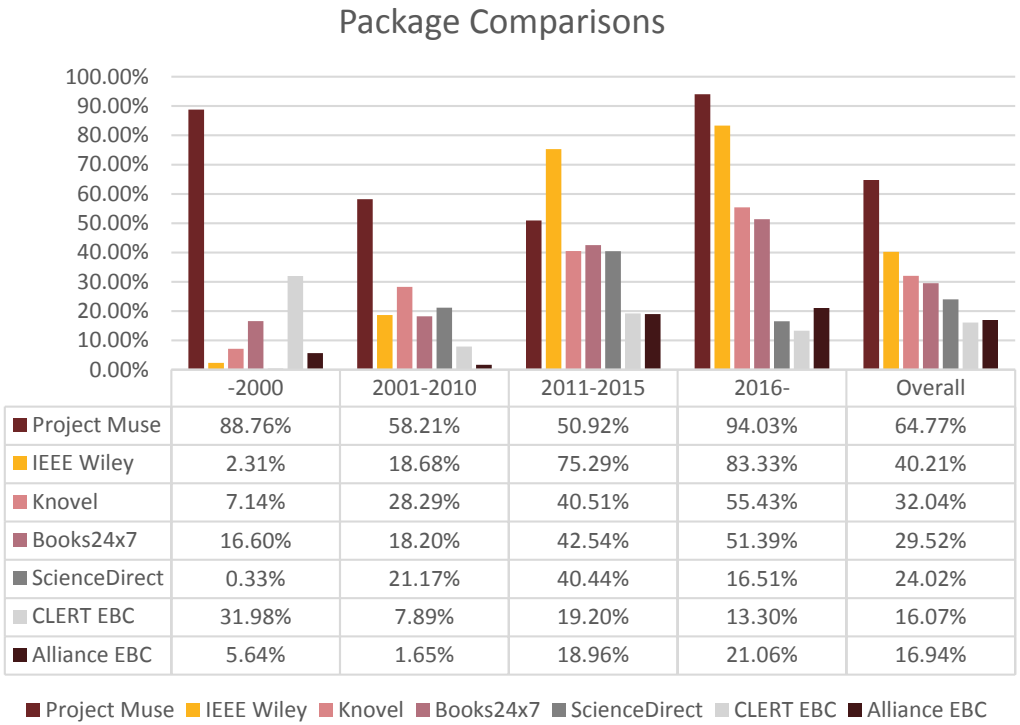
The number of duplicates will vary depending on package and by date within packages. While overall number of duplicates may be low and not of concern, an individual package may have quite a few.

Things To Consider

- Budgetary implications
  - Paying for same title multiple times
  - Collections with a high percentage of duplicates
- Staff time & efficiency
  - Figuring out status of titles, troubleshooting
  - Complicated workflows to handle duplicates
- Discovery & user experience
  - Confusion about number of copies
  - Potentially poor experience depending on platform

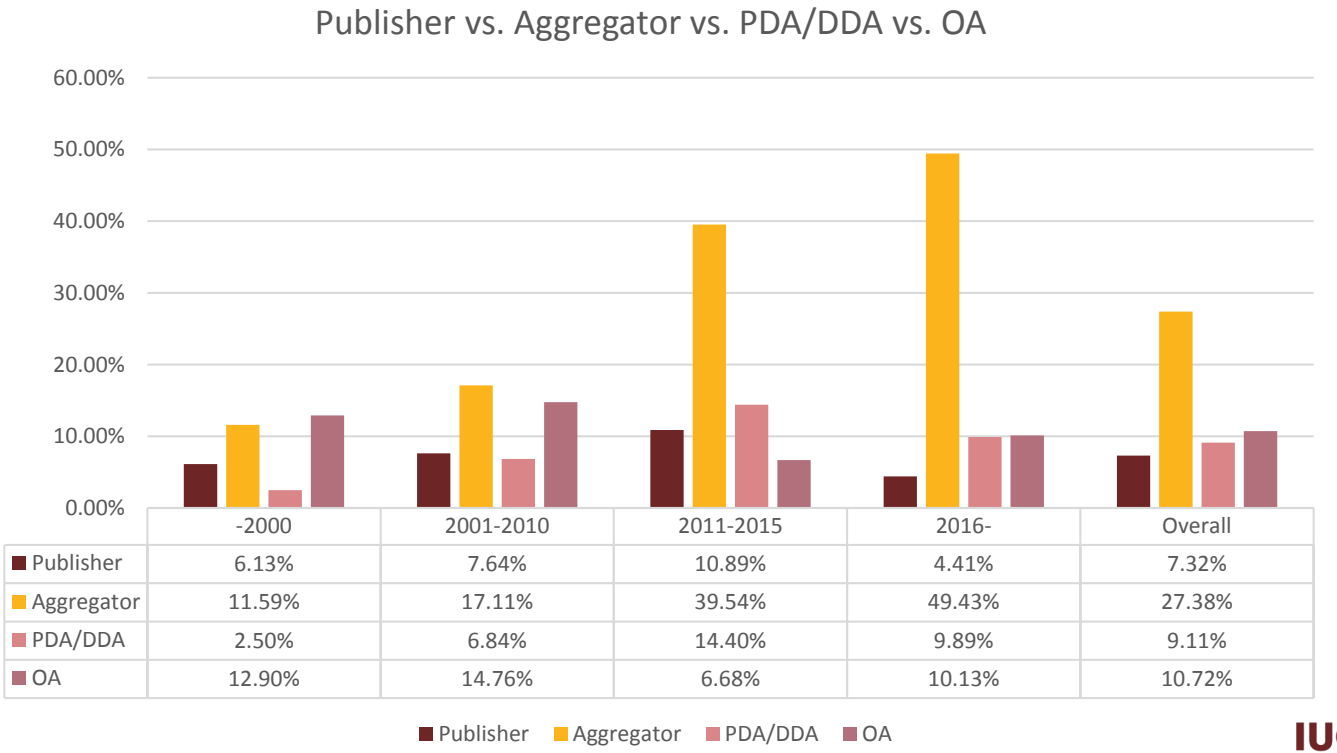


Duplicate Records @ KFL



	-2000	2001-2010	2011-2015	2016-	Overall
Project Muse	88.76%	58.21%	50.92%	94.03%	64.77%
IEEE Wiley	2.31%	18.68%	75.29%	83.33%	40.21%
Knovel	7.14%	28.29%	40.51%	55.43%	32.04%
Books24x7	16.60%	18.20%	42.54%	51.39%	29.52%
ScienceDirect	0.33%	21.17%	40.44%	16.51%	24.02%
CLERT EBC	31.98%	7.89%	19.20%	13.30%	16.07%
Alliance EBC	5.64%	1.65%	18.96%	21.06%	16.94%

Duplicate Records @ KFL

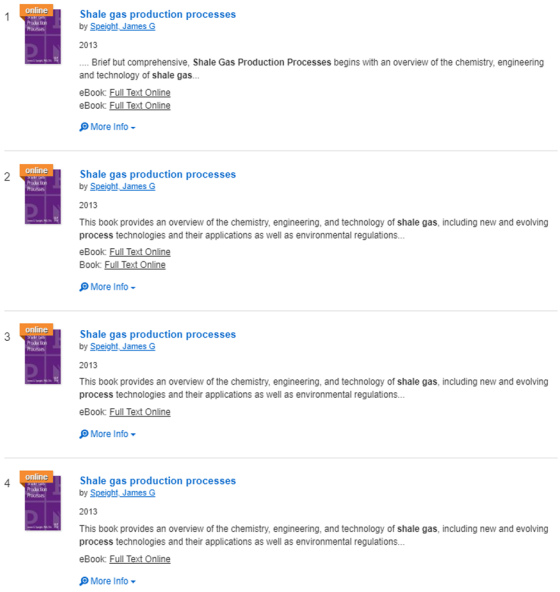


	-2000	2001-2010	2011-2015	2016-	Overall
Publisher	6.13%	7.64%	10.89%	4.41%	7.32%
Aggregator	11.59%	17.11%	39.54%	49.43%	27.38%
PDA/DDA	2.50%	6.84%	14.40%	9.89%	9.11%
OA	12.90%	14.76%	6.68%	10.13%	10.72%

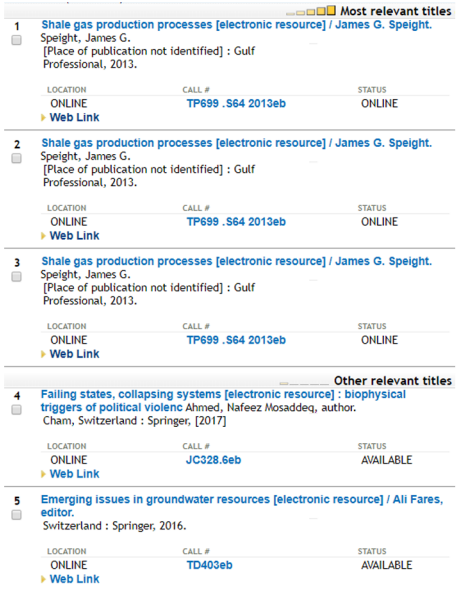
Results List Example

Summon vs. WebPAC Search results for *Shale gas production processes*

Summon



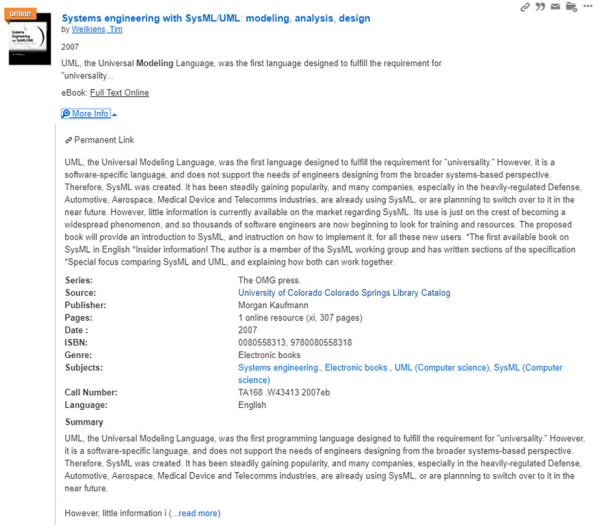
WebPAC



Extended Information Example

Summon vs. WebPAC extended information for *Sytems engineering with SysML/UML*

Summon



Systems engineering with SysML/UML: modeling, analysis, design

by Weilkiens, Tim

2007

UML, the Universal **Modeling** Language, was the first language designed to fulfill the requirement for "universality...

eBook: Full Text Online

More Info

Permanent Link

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Series:	The OMG press.
Source:	University of Colorado Colorado Springs Library Catalog
Publisher:	Morgan Kaufmann
Pages:	1 online resource (xi, 307 pages)
Date :	2007
ISBN:	0080558313, 9780080558318
Genre:	Electronic books
Subjects:	Systems engineering., Electronic books., UML (Computer science), SysML (Computer science)
Call Number:	TA168 .W43413 2007eb
Language:	English

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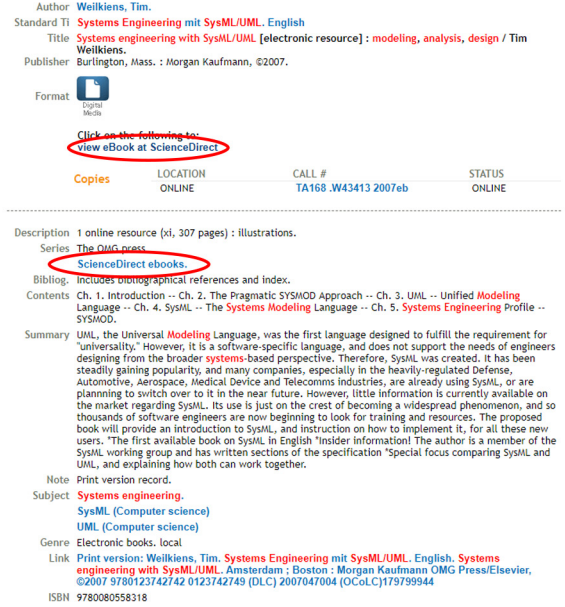
WebPAC



Author	Weilkiens, Tim.
Standard Ti	Systems Engineering mit SysML/UML. English
Title	Systems engineering with SysML/UML [electronic resource] : modeling, analysis, design / Tim Weilkiens.
Publisher	Burlington, Mass. : Morgan Kaufmann, ©2007.
Format	Digital Media

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Copies	LOCATION	CALL #	STATUS
	ONLINE	TA168 .W43413 2007eb	ONLINE

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Genre	Electronic books. local
Link	Print version: Weilkiens, Tim. Systems Engineering mit SysML/UML. English. Systems engineering with SysML/UML. Amsterdam ; Boston : Morgan Kaufmann OMG Press/Elsevier, ©2007 9780123742742 0123742749 (DLC) 2007047004 (OCoLC)179799944
ISBN	9780080558318

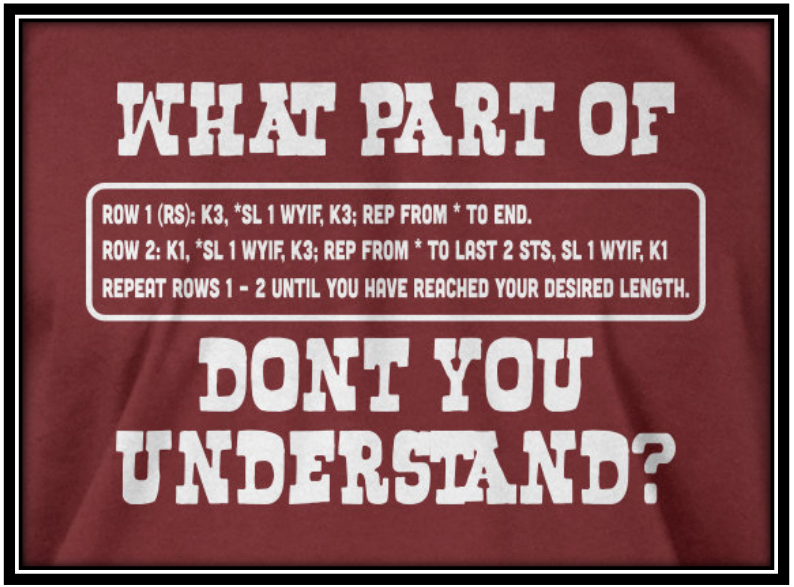
Potential Solutions to Duplicates

- Rely on discovery layers
  - Many can merge titles/records to reduce duplication seen by users
  - Takes time and experimentation to set up
  - Not always reliable
- Go provider neutral
  - Many knowledge bases can track and send one record for the same title
  - Staff time to maintain, with a reliable match point required
  - Statistic gathering can be difficult
- Suppress records
  - Ease of tracking titles in a package
  - Ability to determine which record appears to users
  - Many ILS have reports to assist in finding duplicate records
  - Staff time to maintain

Write It All Down

Document, Document, Document

- What information do you want to have ready access to?
- Where you get records form, along with login & passwords.
- What edits you make to records.
- Where edits are made.
- Have other people review your documentation to make sure it makes sense.



Documentation Examples

E-Resource	001 Prefix	540	710	740	830	856|z	956	WMS file name	Frequency
AccessEngineering	ace				McGraw-Hill's AccessEngineering.	view eBook at AccessEngineering		AccessEng	Monthly
ACLS Humanities	acls				ACLS Humanities E-Book.	view eBook at ACLS Humanites E-book		ACLS	Monthly
ACM eBooks	acm		ACM Digital Library.		ACM Digital Library eBooks.	view eBook at ACM Digital Library		ACM	Monthly
AVON	asp	KFL-PPR: Public performance is allowed as long as no admission fee or donation is collected, the screening takes place on campus, attendees are authorized users (currently enrolled students, staff, faculty, and visiting scholars), and the screening is not advertised or promoted to the general public.	Alexander Street (Firm)		Academic Video Online.	view streaming video at Alexander Street Press	AVON subscription	ASPAVON	Monthly
AVON owned	asp	KFL-PPR: Public performance is allowed as long as no admission fee or donation is collected, the screening takes place on campus, attendees are authorized users (currently enrolled students, staff, faculty, and visiting scholars), and the screening is not advertised or promoted to the general public.	Alexander Street (Firm)		Academic Video Online.	view streaming video at Alexander Street Press	AVON purchased	ASPAVON	Monthly
Cambridge Open Access	coa		Cambridge University Press.		Cambridge open access books.	view eBook at Cambridge University Press		Cambridge	Monthly
CLERT Ebook Central Discovery	bebcd		Ebook Central (CU)			view eBook at Ebook Central	CU Ebook Central PDA Discovery	CUEBCPDADiscovery	Weekly
CLERT Ebook Central Purchased	bebcp		Ebook Central (CU)			view eBook at Ebook Central	CU Ebook Central PDA Purchased	CUEBCPurchased	Weekly

MARC records source	WorldShare OCLC Collection Manager or http://www.springer.com/gp/librarians/marc/marc-records-tool
MARC record availability notification	Must manually go to OCLC each year to gather records for the new annual collection - for 2016 need to select the collections listed in "subjects covered" above
MARC modifications	Series 490 0 _ Springer eBook Collection / [name of collection]
	Subject 655 _ 7 Electronic books.|2local
	Add Author 710 2 _ SpringerLink (Online service)
	Misc MARC 856 4 0 |zview eBook at SpringerLink
	Call numbers end in eb
Discovery vs. purchased identifiers	n/a
Multiple copy suppression rules	We own the titles so will not suppress
956 field	n/a

Keeping Statistics

Remember that in general you are tracking the number of records in a package in your system.

Which may or may not be equal to the number of titles available.

There are lots of useful formulas if you need to track totals for eBooks purchased with different types of funds.

Statistics Example

			Jul. 2018		Aug.		Sept.		Oct.		Nov.		Dec.		Jan. 2019		Feb.		Mar.		Apr.		May		June		Annual Total		Grand Total
eBook Package	Cap, Non,	End of FY18	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrav	Added	Withdrawn	Added	Withdrawn	
ABC-CLIO	Cap	22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	22
Access Engineering	Non-Cap	680	0	0	0	0	0	0	0	0	697	680	0	0	24	2	0	0	3	0	4	0	0	0	0	0	728	682	726
ACLS Humanities	Non-Cap	4,461	4,917	4,461	0	0	0	0	1	1	249	1	0	0	0	0	0	0	4	2	1	1	0	0	0	0	5,172	4,466	5,167
ACM eBooks	Cap	17	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0	20
APA 14	Cap	33	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	33
BEP	Cap	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20
Books 24x7 (BP/EP/ITP)	Non-Cap	27,492	160	1	127	0	0	0	162	3	0	1	3,751	1,387	35	0	0	0	2	2	114	2	0	0	0	0	4,351	1,396	30,447
Cambridge Open Access	Other	20	12	3	0	0	0	0	0	0	0	0	0	0	3	0	0	0	4	0	0	0	0	0	0	0	19	3	36
EBC - Alliance purch	Cap	2,291	63	0	133	0	0	0	0	0	0	0	0	0	275	0	57	0	67	0	100	0	0	0	0	0	695	0	2,986
EBC - CLERT purch	Cap	32	0	0	14,401	32	0	0	139	1	168	0	125	0	132	0	0	0	403	2	216	4	0	0	0	0	15,584	39	15,577
EBL - Alliance purch	Cap	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ebrary - Alliance purch	Cap	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
EBSCO PDA Purch.	Cap	5,623	542	0	5	0	0	0	0	0	0	0	0	0	35,134	6,170	0	0	391	2	342	0	0	0	0	0	36,414	6,172	35,865
GYRL	Cap	791	0	0	0	0	0	0	0	0	0	0	40	0	0	0	0	0	0	0	0	0	0	0	0	0	40	0	831
ICPSR	Other	9,881	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9,881
IEEE Xplore MIT	Cap	125	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	124
IEEE Xplore Wiley	Cap	1,009	29	24	0	0	0	1	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	30	26	1,013
IOP	Cap	100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	230	100	0	0	0	0	230	100	230
JSTOR Open Access eBook	Other	2,847	375	63	141	4	35	4	646	18	268	31	140	1	338	12	0	0	554	67	136	26	0	0	0	0	2,633	226	5,254
Knovel	Non-Cap	5,979	1	0	0	0	463	56	101	0	1	3	0	0	87	95	0	0	205	147	2	2	0	0	0	0	860	303	6,536
Knowledge Unlatched	Other	27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	27
Loeb Classical Library	Cap	228	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	3	0	0	0	0	0	4	1	231
MITCognet YBP purch	Cap	78	0	0	0	0	0	0	0	0	11	0	0	0	89	89	0	0	0	0	0	0	0	0	0	0	100	89	89
Morgan/Claypool CDL	Cap	149	0	0	0	0	0	0	164	149	0	0	0	0	2	0	0	0	0	0	2	0	0	0	0	0	168	149	168
Morgan/Claypool SDL	Cap	749	0	0	0	0	0	0	850	749	0	0	0	0	17	0	0	0	0	0	22	3	0	0	0	0	889	752	886
Music Online	Non-Cap	37,147	1,751	35	1	1	131	3	584	7	0	0	1	2	12	3	0	0	3	3	614	1	0	0	0	0	3,097	55	40,189
MyiLibrary purch	Cap	9,006	0	0	0	9,006	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9,006	0
National Academies Presses	Other	25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	25
NetLib (now Ebsco)	Cap	13,089	0	0	0	0	0	0	0	0	0	0	0	0	0	13,089	0	0	0	0	0	0	0	0	0	0	0	13,089	0
Oxford DNB	Non-Cap	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
Oxford Handbooks	Cap	88	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	88
Oxford Reference Library	Cap	40	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	0	41
Oxford Reference Premium	Non-Cap	290	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	290
Oxford Scholarship Online	Cap	5,768	80	0	0	0	0	0	170	0	183	0	94	0	0	0	185	0	189	0	0	0	0	0	0	0	901	0	6,669
PastMasters	Cap	68	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	68
Project MUSE Cornell Open	Other	539	0	0	0	0	0	0	1	61	115	2	0	0	5	0	0	0	0	0	0	0	0	0	0	0	121	63	597
Psychiatry Online	Non-Cap	23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	23
RKMA	Cap	24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	24
Sage RM Cases	Cap	604	0	0	0	0	639	604	95	95	0	0	0	0	0	0	0	0	1	1	8	0	0	0	0	0	743	700	647
Sage RM eBooks	Cap	900	0	0	0	0	1,003	900	0	0	0	0	0	0	1	1	0	0	0	0	5	0	0	0	0	0	1,009	901	1,008
ScienceDirect	Cap	11,328	246	518	0	0	112	139	401	0	73	1	0	0	296	128	0	0	22,664	2	251	0	0	0	0	0	24,043	788	34,583
SIAM	Cap	446	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	446
SPIE	Cap	269	0	0	0	0	0	0	342	269	0	0	0	0	5	0	0	0	9	0	2	0	0	0	0	0	358	269	358
SpringerLink	Cap	68,139	566	12	1	1	428	4	802	6	335	15	1,634	31	1,734	470	0	0	1,269	226	505	13	0	0	0	0	7,274	778	74,635
Stat!Ref	Cap	35	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	35
University Press of Colorado	Other	119	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12	0	131
WWO	Non-Cap	381	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	381
Total	Cap	121,071	1,529	555	14,540	9,039	2,182	1,648	2,963	1,270	771	16	1,893	31	37,686	19,948	242	0	24,993	233	1,687	120	0	0	0	0	88,486	32,860	176,697
Grand Total		210,983	8,757	5,118	14,809	9,044	2,811	1,711	4,458	1,360	2,101	734	5,785	1,421	38,190	20,060	242	0	25,768	454	2,558	152	0	0	0	0	105,479	40,054	276,408

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Thank you!

Questions?