THE UNIVERSITY OF
MEMPHIS

Coverage Load Woes and Alternatives

Automating Accurate Electronic Serials Holdings Data in Bibliographic Records

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In the beginning…

Micropaleontology [Periodical]

Periodical | Micropaleontology Project [etc.] | 1955 -

Additional actions:

→ Available Online → Available Online → Available Online

→ Address for accessing the journal using authorization number and password through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text

→ Address for accessing the journal from an authorized IP address through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text

Library Holdings

Location	McWherter Library - 2nd Floor - Periodicals
Holdings	v.1 (1955) - v.55 (2009)

Establishing the Need

- Collection Management staff spent copious amounts of time creating and updating links and public notes in bibliographic record MARC 856s for serials with electronic access.
- Duplicated the work of our e-resource access and management software (ERAMS), Serials Solutions
  - The updated information also quickly became outdated and inaccurate.
- Attempts to use Sierra's Coverage Load also meant hours of cleaning up brief records that either did not load properly or did not overlay existing records.
- Paying our ERAMS vendor a premium for MARC records was not an option.

Searching the Literature

ILS predates emergence of electronic serials

- Traditional cataloging alone cannot keep pace with exponential growth[1]

Options:

- MARC record service
  - Maintains separate records for print & online serials
  - Keeps bibliographic record the primary access point
  - University of North Carolina Wilmington study of 2 services find that 40% of respondent felt there was room for improvement[2]
  - Full automation of MARC record service is not optimal

Outside the ILS . . .

Link resolvers + knowledgebases determine appropriate copy based on library-specific holdings

Knowledgebases maintain all journal-related metadata

- Any inaccurate, incomplete, or inconsistent data affects access

Relying exclusively on the knowledgebase for electronic serials maintenance & access is risky

Outside the ILS . . .

University of Michigan compares OpenURL to a static, direct link in the ILS

- 20% of full-text requests vis OpenURL fail

University of Toronto compares title lists from content providers to knowledgebase

- Metadata discrepancies between various players in data supply chain
- Publisher-supplied title lists are not management tools

What's the Big Deal?

"Big Deal" serial packages introduced packages that include access-only serials

Buy-in needed along the supply chain:

- Knowledgebases and Related Tools (KBART)
- Improving OpenURLs Through Analytics (IOTA), and
- Presentation and Identification of E-Journals (PIE-J),

Devising a Plan

GOAL: Automate replacement of the various incorrect, incomplete, or deprecated public notes and resource links in bibliographic records.

- Replace the public notes with a standardized note
- Replace the various URLs with a single ERAMS URL

Finding the Missing Link

http://zr8br4nt7z.search.serialssolutions.com/?V=1.0&N=100&L=ZR8BR4NT7Z&S=I_M&C=[ISSN]

Base URL

MARC: I love you, you're perfect, now change

- Delete existing 856s
- Copy (first occurrence of) 022$a to new 856$u
- Replace (856)$u with a public note and base Serials Solutions URL.
  - Example
    - ~~85640$uhttp://ezproxy.samplelinks.yourdomain.edu$3Incorrect note~~
    - Copy 022$a to 856$u
    - Change 856 data from $u to 856$3Public note goes here $uhttp://zr8br4nt7z.search. serialssolutions.com/?V=1.0&N=100&L=ZR8BR4NT7Z&S=I_M&C=

Where To Start? Selecting Records for a Pilot

- Shared database & content added via OCLC Connexion, z39.50 protocol, authorities and bibliographic record vendor loads, EDIFACT ordering, and other vendor-provided
- Create Lists used to identify serials bib records with proxied link.
- 022 $a required for automation of SerialsSolutions link

Involving the Stakeholders

- Integrated Library Systems Advisory Council
  - Includes representation from all partner schools and most library departments.
  - Approved public note, proposed workflow
- Reference and Instructional Services Group
  - Explained mpact of the project on the end user:
    - Instead of asking patrons to select from a list of links which may be broken or have an incorrect date range, we ask patrons instead to click on a single link with a standardized public note.
    - Ensures accuracy & consistency in the user's experience
    - Minimizes cognitive load and simplifies the process for users

Clean, Lean, Access Machine

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Additional actions:

→ University of Memphis Authorized Users - Click to Check Availability

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#	Record	Data
☑ 52	b21656824	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=8336"
☑ 53	b21656800	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=4079767|zRestricted to IEEE Xplore subscribers"
☑ 54	b21656794	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=8147"
☑ 55	b21656782	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=8216"
☑ 56	b21656836	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=4043135|zRestricted to IEEE Xplore subscribers"
☑ 57	b21656770	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=4081845|zRestricted to IEEE Xplore subscribers"
☑ 58	b20410451	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=4149673|zRestricted to IEEE Xplore subscribers"
☑ 59	b20354228	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=4100185"
☑ 60	b19425612	Delete y - "85642|3Selected articles|uhttp://www.aivf.org/the%5Findependent/"
☑ 61	b15727099	Delete y - "85641|uhttp://nopr.niscair.res.in/handle/123456789/59|3Online issues available via Open J-Gate, 2007-Present."
☑ 62	b25639201	Delete y - "85641|uhttp://www.sciencedirect.com/science/journal/03603199"
☑ 63	b24289395	Delete y - "85641|uhttp://www.sciencedirect.com/science/journal/03603016"
☑ 64	b21677980	Delete y - "85641|uhttp://ieeexplore.ieee.org/servlet/opac?punumber=4501502|zRestricted to IEEE Xplore subscribers"
☑ 65	b16400227	Delete y - "85641|uhttp://iveybusinessjournal.com/"
☑ 66	b30456599	Delete y - "8564 |uhttp://firstsearch.oclc.org|zAddress for accessing the journal using authorization number and password through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text"
☑ 67	b20111241	Delete y - "85641|uhttp://ams.allenpress.com/amsonline/?request=get-toc&issn=1558-8432"
☑ 68	b21673561	Delete y - "85641|uhttp://www.informaworld.com/openurl?genre=journal&issn=1559-808X" Delete y - "8564 |uhttp://firstsearch.oclc.org|zAddress for accessing the journal using authorization number and password through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text" Delete y - "8564 |uhttp://firstsearch.oclc.org/journal=1363-2469;screen=info;ECOIP|zAddress for accessing the journal from an authorized IP address through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text"
☑ 69	b25280818	Delete y - "85641|zSubscription required.|uhttp://purl.org/atlaonline/pls/eli/eli_bd.volsuper?TXT=n0022-0558" Delete y - "85641|uhttp://web.ebscohost.com/ehost/results?sid=66376c22-9fd6-441b-9fd8-673aee39d230%40sessionmgr4&vid=4&hid=14&bquery=%28TI+%28journal+of+Ecumenical+Studies"
☑ 70	b21673494	Delete y - "85641|uhttp://www.sciencedirect.com/science/journal/02643707"
☑ 71	b21719627	Delete y - "85640|zView online|uhttp://www.palgrave-journals.com/jittc/"
☑ 72	b21632108	Delete y - "8564 |uhttp://firstsearch.oclc.org|zAddress for accessing the journal using authorization number and password through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text"
☑ 73	b2174466x	Delete y - "85641|uhttp://iopscience.iop.org/1751-8121"
☑ 74	b21628890	Delete y - "85641|uhttp://www3.interscience.wiley.com/cgi-bin/jissue/104042738"

150 Records

Results, Implications, Limitations

- 3,500 unique bibliographic serials records have links!
  - Government documents and partner library records have not been touched
- Time saved updating ILS and Serials Solutions
- Less chance for human error in updating MARC 856 fields individually
- Less user frustration with inaccurate ILS
- Cannot accommodate multiple ISSNs or title changes

References

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2. Rebecca Kemp, "MARC Record Services: A Comparative Study of Library Practices and Perceptions," *Serials Librarian* 55, no 3(2008): 379-410. doi:10.1080/03615260802056367.
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6. Marlene van Ballegooie and Juliya Borie, "Facing our E-Demons: The Challenges of E-Serial Management in a Large Academic Library," *Serials Librarian* 68, no 1-4(2015): 100. doi:10.1080/0361526X.2015.1017714.
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