

# *Complete Solutions for Today's Electronic Collections*

29, January, 2007

Sydney, Australia

JR Jenkins, MLIS

Group Product Manager

**SerialsSolutions**

# Today's Agenda

- Collections have changed - but the OPAC hasn't!
- The role of MARC updating service:
  - *Maintain the OPAC as a relevant finding tool in the digital era*
  - *Minimize librarian workload*
- Walk-through of notable features
- The Knowledgebase
- Q and A

# Why MARC Records updating service?

## Market Problem: E-resources in the catalog

- At most libraries, a significant majority of the journal collection is in electronic format
  - E-Serials change so constantly that librarians cannot keep MARC records up-to-date for their e-resources.
  - If there's no MARC record in they system, the catalog incorrectly tells patrons the journal is not available.
- Result: Under-utilization of their electronic resources and their OPAC. Unrealistic workload on librarians.

# Market Solution - e-serials in the catalog

## Updating Service

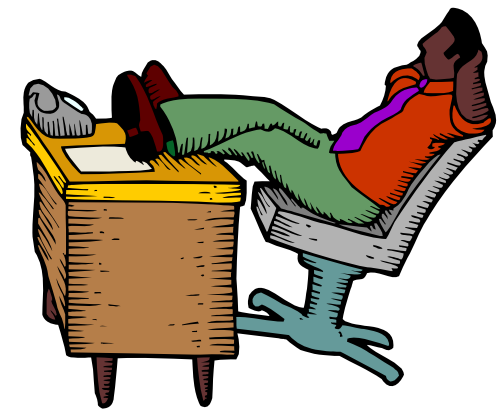
1. Initial load provides MARC records for all e-serials.
2. Monthly updates keep data up-to-date
3. Example:

<b>Records delivered at start of service:</b>	<b>5,965</b>
<b>Changes during one year:</b>	<b>31,072</b>
<b>Records in OPAC at end of year:</b>	<b>8,449</b>
<b>Average workload per month:</b>	<b>2 hours</b>

SERIALS SOLUTIONS FULL  
**MARC**  
RECORDS

## The Industry Leader

1. Customized for each library
2. Highest quality records
3. 100% coverage
4. Link directly from catalog to full-text.



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# Serials collections mostly online

Institution type	Avg number of print journals**	Avg number of electronic journals***	E-journals as percent of all journals
Associate* (n=60)	874	5,617	86.5%
Baccalaureate* (n=60)	1,372	6,841	83.3%
Masters* (n=60)	3,178	7,910	71.3%
Doctoral* (n=30)	15,046	9,836	39.5%
Large publics (n=25)	3,529	6,362	64.3%

\* per Carnegie Classification, 2000

\*\* greater of 1998 IPEDS or 2002 *American Library Directory*

\*\*\* Serials Solutions data, September 2003

# Looking for a Journal in the Catalog?

*Patron searches for "Banking Law Review".....*

JOURNAL TITLE  View Entire Collection  Search

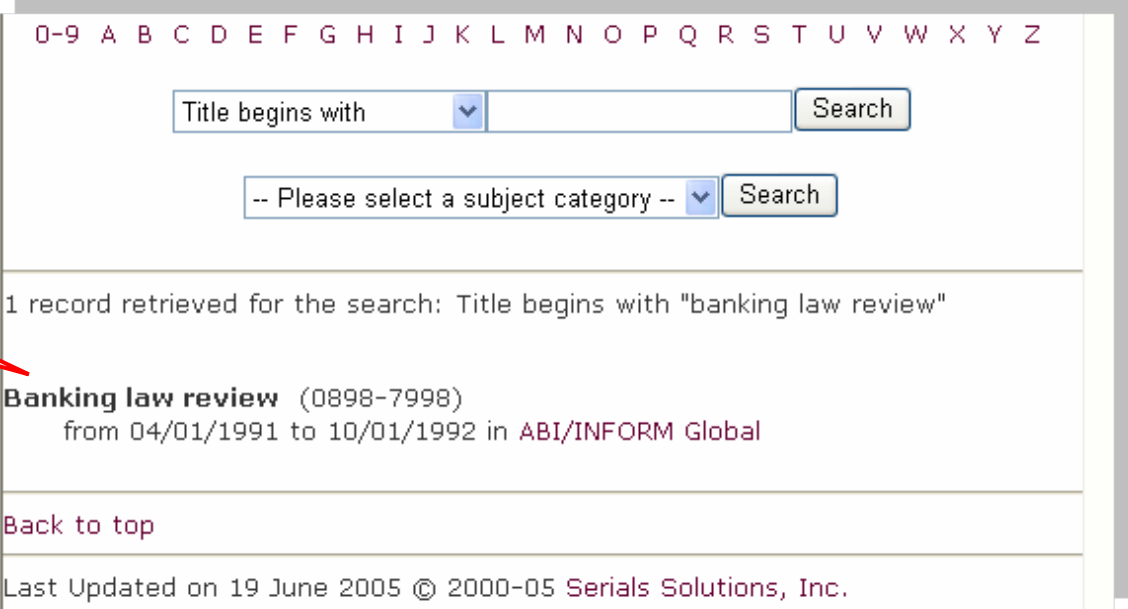
No matches found; nearby JOURNAL TITLES are:  
Result page: [Prev](#) [Next](#)

Banking Journal :
Banking Law Journal :
Banking Law Journal Digest :
<b>Your entry <b>Banking Law Review</b> would be here</b>
Banking Laws For Examiners :

# At the same institution...

*Another patron searches for "Banking Law Review" using the A-to-Z title list in Serials Solutions AMS...*

Journal exists in collection, but not in OPAC



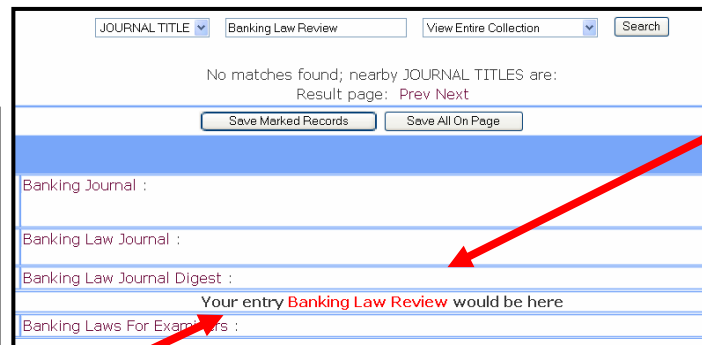
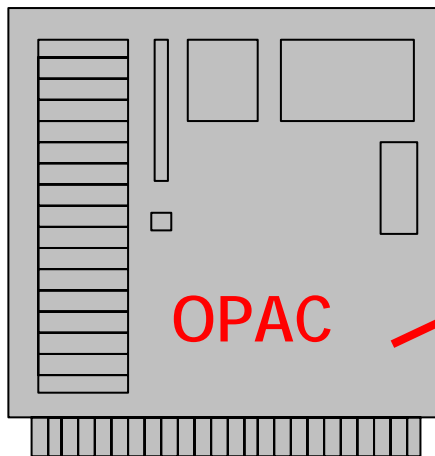
The screenshot shows the Serials Solutions AMS interface. At the top, there is a navigation bar with letters from 0-9 to A-Z. Below this is a search form with two sections. The first section has a dropdown menu set to 'Title begins with', an empty text input field, and a 'Search' button. The second section has a dropdown menu set to '-- Please select a subject category --', an empty text input field, and a 'Search' button. Below the search form, a message states '1 record retrieved for the search: Title begins with "banking law review"'. The search result is for 'Banking law review (0898-7998)' from 04/01/1991 to 10/01/1992 in ABI/INFORM Global. At the bottom, there is a 'Back to top' link and a footer that reads 'Last Updated on 19 June 2005 © 2000-05 Serials Solutions, Inc.'

*Search using Serials Solutions AMS*

# OPAC: Isolated from Electronic Collections

When would you *not* catalog up to 80 percent of your collection?

I guess the library doesn't have that journal!



# Using local staff to catalog e-journals



Get e-serial holdings data for all databases



Find and import MARC bibliographic records



Customize records to meet local requirements



Add e-serial holdings to bib records



When URLs and coverage dates change, or you add or lose coverage, modify holdings data on record. Also delete records when you lose all coverage, and find and add new records when you get brand new journal coverage

Repeat step 5  
several thousand  
times a year!

# MARC: The challenges and Solution

## Patron's challenges...

E-Serials should be included in the OPAC

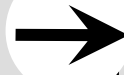
- Up to 85% of journals *not* in OPAC if e-serials excluded
- Resources ignored and underused by patrons
- Frustrated patrons



## Librarian's challenges...

E-Serials are too dynamic for usual processes

- Constant changes to electronic content:
- Added/dropped titles
  - Changing URLs
  - Changing Holdings dates
  - Embargo dates
  - Changed titles



## A comprehensive solution

Serials Solutions  
MARC updating  
service keeps the  
OPAC up-to-date

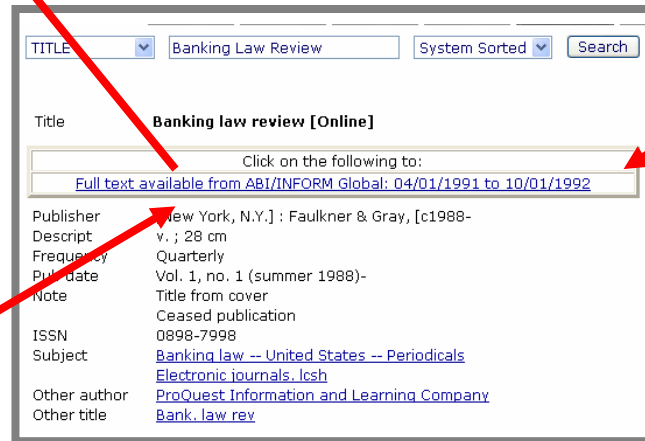
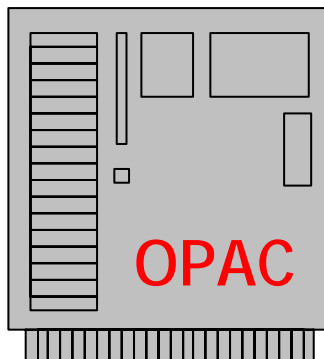
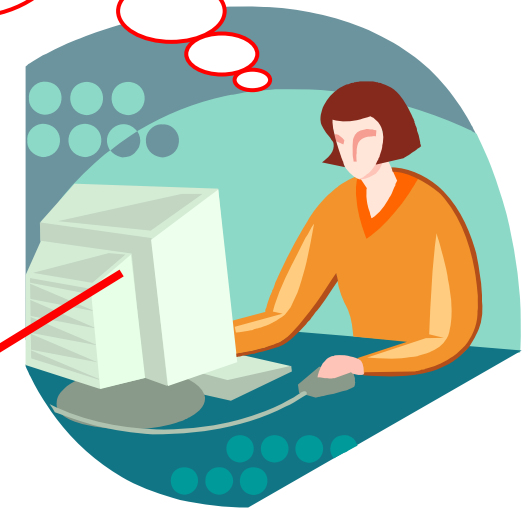
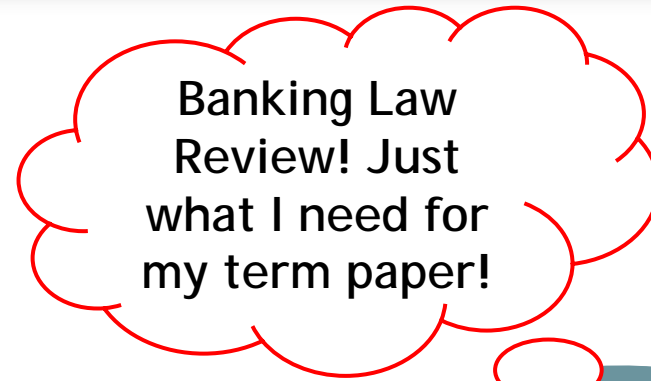
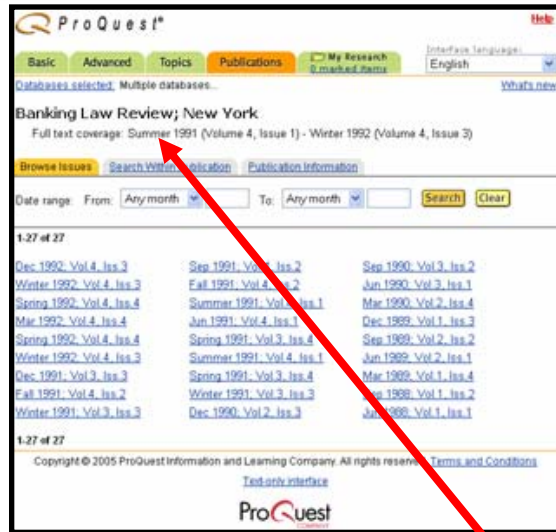
- Minimize librarian workload
- Provide patrons with consistent, accurate answers
- Maintain OPAC as a valuable finding tool

# Key Benefits

- **Maintain OPAC as a relevant finding tool in digital era**
  - “Known item” searching. Ensure patrons are able to locate specific journals
  - “Discovery searching.” Ensure patrons are able to use OPAC features, such as subject browsing, etc.
- **Minimize librarian workload**
  - Eliminate redundant data management work

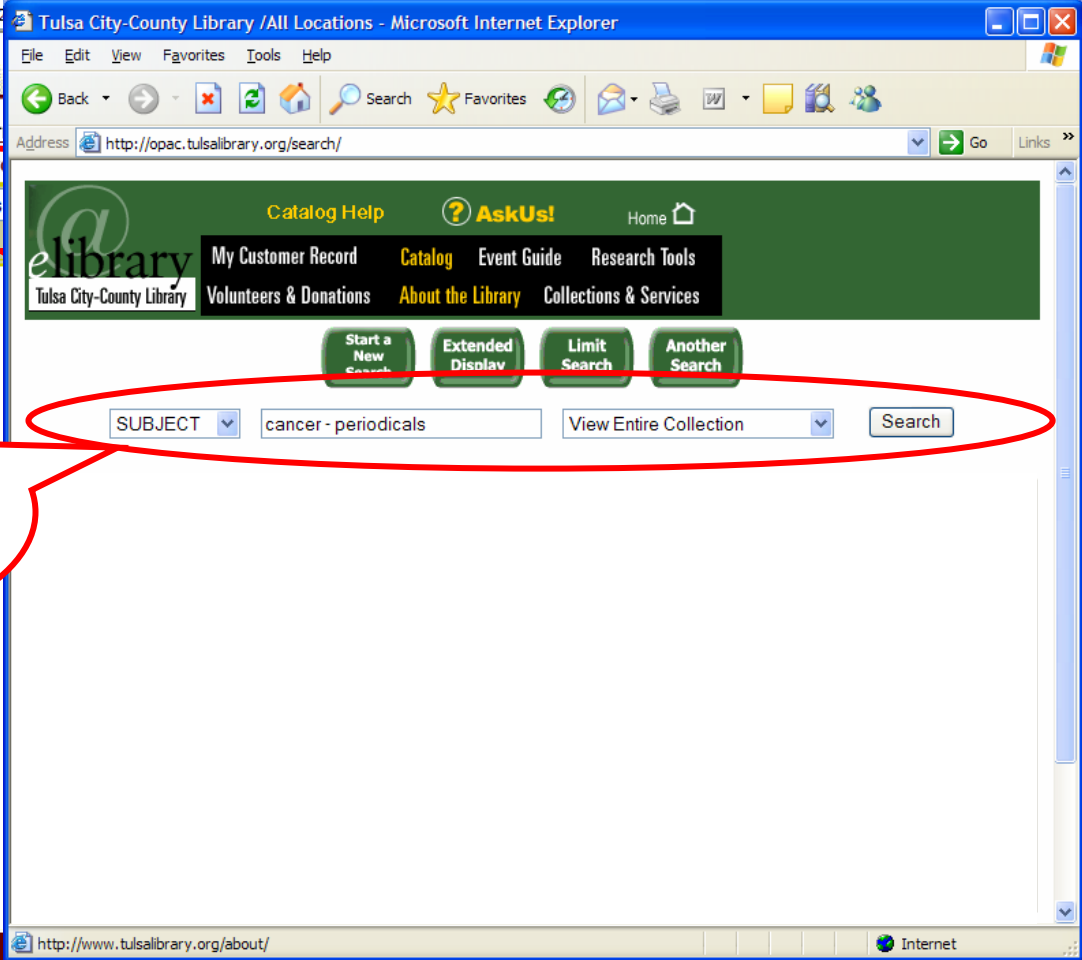
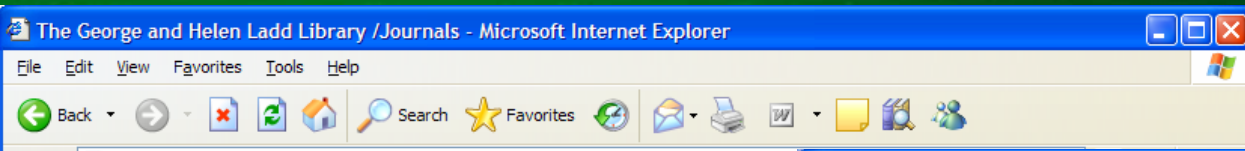
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**MARC**  
RECORDS

# OPAC with Full MARC Records for E-Journals



*Realize the full value of your investments in online resources & your ILS!*

# Leverage the full search capabilities of your OPAC



Using Library of Congress Subject Headings, browse by subject area.

Save Marked Records  
Save All On Page

64

Result page: 1 2 3 4 5 6 Next

# Minimizing Librarian Workload

## Initial Setup & Load:

- Customize your records  
*Choose default edits, or make your own customizations*
- Load new records for your collection into your OPAC

## Ongoing Maintenance:

- Load updated records every month  
*Many libraries do this in as little as one hour per month!*
- Update Client Center when you make changes to your subscriptions

*That's all!*

# Real World Example

Month 1

5,965  
in file

## Library Profile

- 4-Year Baccalaureate College
- 2,285 students
- 48 Full-text journal databases
- 1 Cataloging librarian

## Full Year Summary

### Initial delivery:

- 5,965 records

### Delivered throughout the year:

- 4,983 New records
- 23,640 Changed records
- 2,449 Delete records

- 8,449 records in OPAC at end of year
- Each monthly update took about one hour of staff time.

*Tremendous time savings!*

# Full MARC Records Updating Service

## Notable Features:

- ✓ The most complete and accurate data (Best Knowledge base in the industry)
- ✓ Highest quality records
- ✓ Virtually unlimited customizations
- ✓ Flexible linking options
- ✓ 100% coverage
- ✓ Consortial record options
- ✓ The best support

SERIALS SOLUTIONS FULL  
MARC  
RECORDS

*The Original and Still Premier.*

SerialsSolutions

# The Knowledge base

- **What is the Knowledge base?**
  - *The Knowledge base is a complete listing of e-resources.*
  - *Includes metadata such as journal title, ISSN, holdings dates, provider, URLs, etc.*
  - *Customized to reflect the library's collection.*
- **Why is it important?**
  - *It is the foundation of all of e-resource management and discovery tools.*
  - *Inaccurate data produces inaccurate answers*
  - *Lack of a knowledgebase restricts ability to manage collection*
  - *Good knowledge base saves librarian time.*
- **Who provides the original, and still premier knowledge base?**
  - *Serials Solutions!*

# The Industry's Leading Knowledgebase

## 1. Comprehensive

- More than 70,000 unique, electronic journals
- More than 1,000 full text electronic databases
- More than 2,000 non-full text electronic e-resources
- More than 1,000,000 MARC Records
- More than 50,000,000 total holdings!
- → No more “missing resources”

## 2. Authority-based

- Meta-data normalized to Library of Congress and other authority data sources by professional data management team
- Eliminates provider errors & omissions
- Enables cross-vendor linking, comparisons

J. Am. Soc. Nephrol.	1046-6673
JASN	1046-6673
Journal of the American Society of Nephrology	
Journal of the American Society of Nephrology	1046-6673
Journal of the American Society of Nephrology	1433-3450
Journal of the American Society of Nephrology	1533-3450
Journal of the American Society of Nephrology : JASN	1046-6673

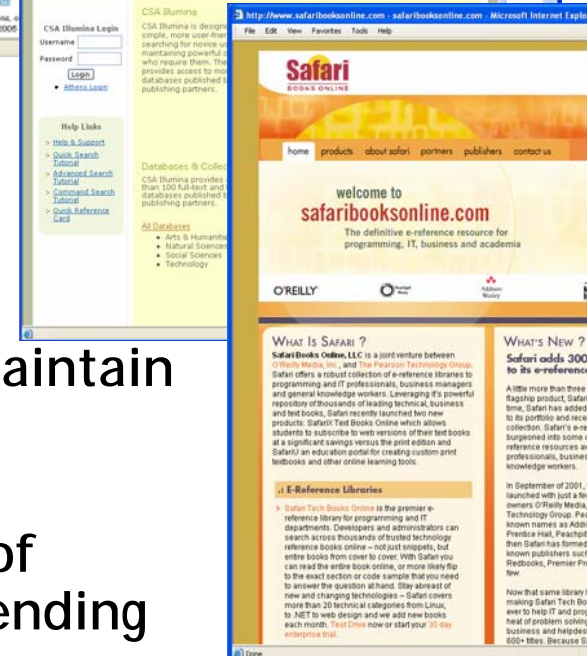
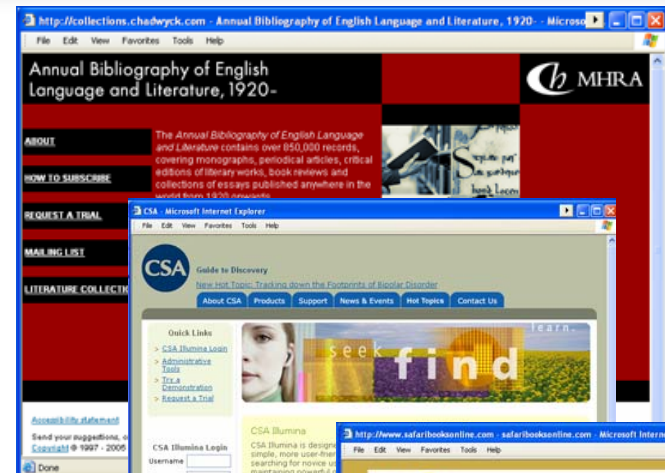
# The Industry's Leading Knowledgebase

## 3. Hosted

- No loading of underlying metadata
- No metadata conversion work
- No monthly update work
- Saves librarians time

## 4. Fully integrated

- All applications are run off of the single knowledge base
- Minimizes librarian workload. No need to maintain same data in multiple databases.
- Delivers consistent answers across all applications. Eliminates patron frustration of different answers to a single question, depending on the tool used



# Authority Knowledgebase = Accurate Answers

Content providers often deliver titles, ISSNs, and holdings data that are incorrect, non-standard, or missing altogether.

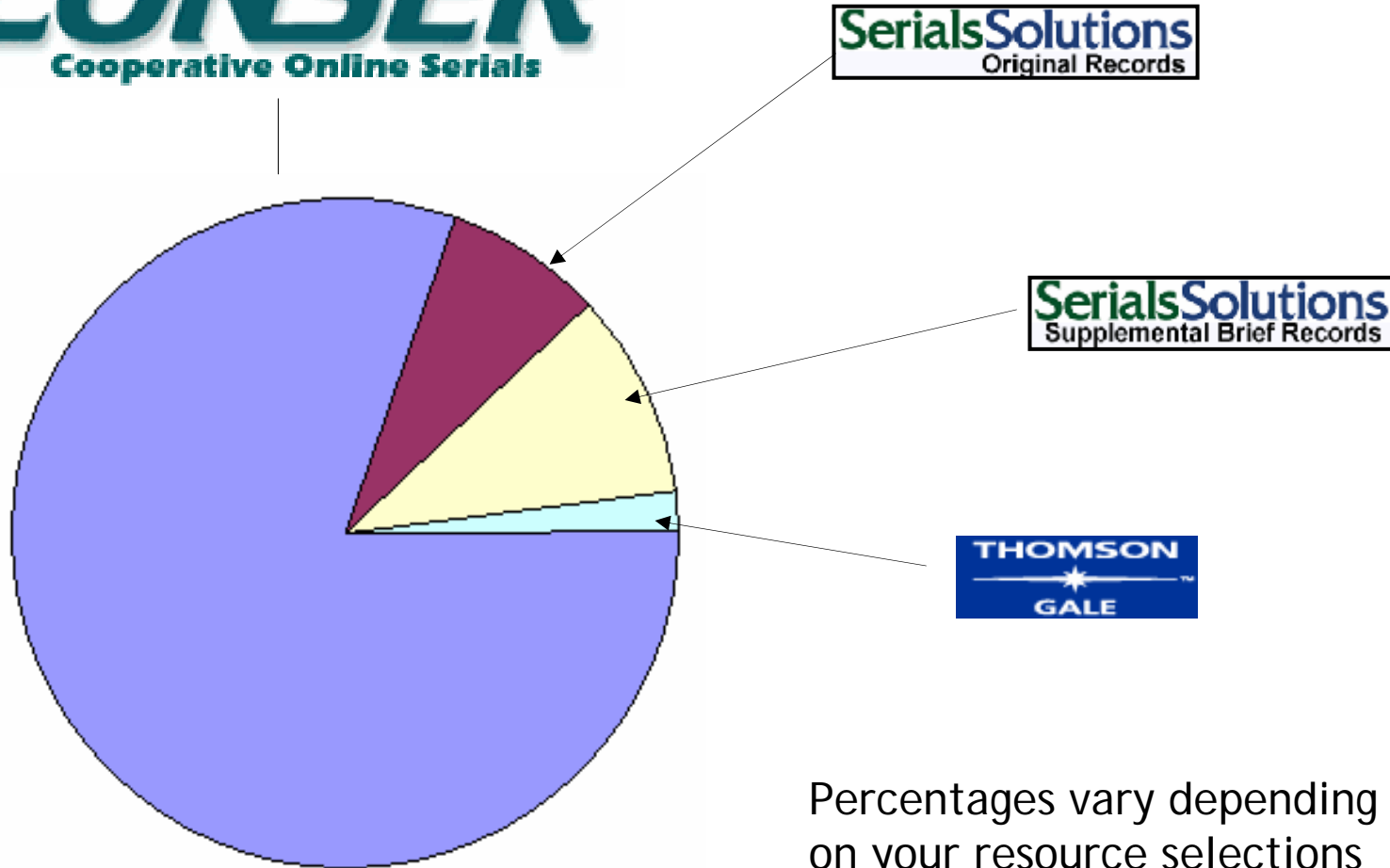


J. Am. Soc. Nephrol.	1046-6673
JASN	1046-6673
Journal of the American Society of Nephrology	
Journal of the American Society of Nephrology	1046-6673
Journal of the American Society of Nephrology	1433-3450
Journal of the American Society of Nephrology	1533-3450
Journal of the American Society of Nephrology : JASN	1046-6673

- Each unique title averages 4.9 different representations (therefore we average 5 normalizing rules per title!)
- Nearly 7400 titles in our database (over 15%) do not have an ISSN. A system that uses the ISSN as a unique identifier cannot track those titles.
- Nearly 5400 titles in our database (about 12%) have both an ISSN and an eISSN. A system that uses the ISSN as a unique identifier cannot be relied on to accurately link an eISSN to its associated ISSN.

# Best Available Bibliographic Records

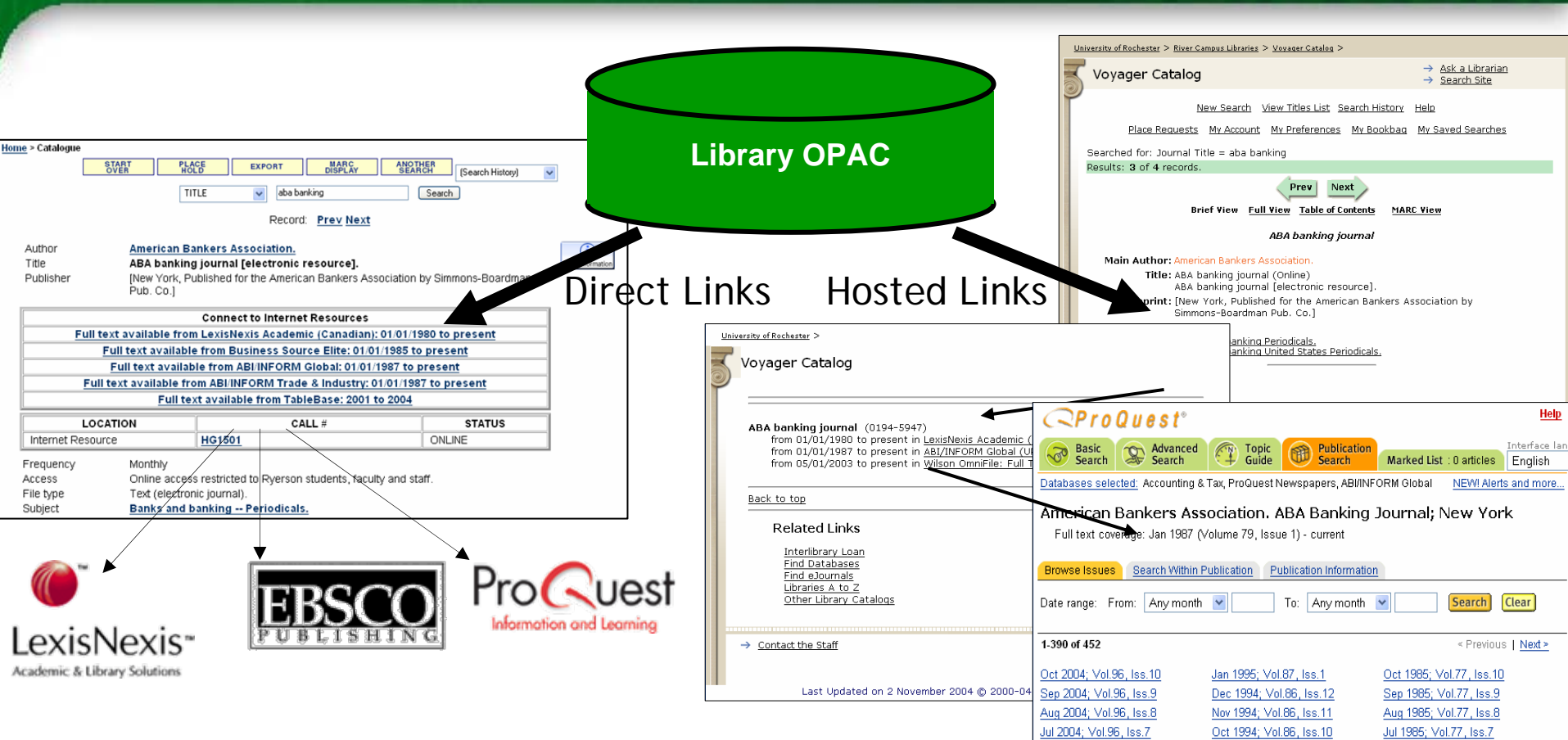
**CONSER**  
Cooperative Online Serials



Percentages vary depending on your resource selections



# Hosted vs. Direct Links



## Benefits:

- Most direct path to content
- All data is present in MARC record

## Benefits:

- Most up to date holdings data
- Fewer record updates

# Customization Options: Direct Links

## Journals, Newspapers & Other Serials The IBISWEB Library Catalog

[Start Over](#)
[Place a Hold](#)
[Export](#)
[MARC Display](#)
[Return to Browse](#)

[Repeat Search In UM Law Catalog](#)
[Repeat Search In UM Medical Catalog](#)
[Repeat Search In CRL Catalog](#)
[STORAGE FACILITY REQUEST](#)
[Another Search](#)

(Search History)

TITLE  journal of academic lib Journals \* Newspapers \* Other Serials

Record: [Prev](#) [Next](#)

Title **Journal of academic librarianship [electronic resource]**  
 Imprint [New York] : Elsevier

### Connect to:

[Full text available from Business Source Premier: 03/01/1975 to 05/01/2004](#)

[Full text available from Library Literature & Information Science Full Text: 01/01/1996 to present](#)

[Full text available from Professional Development Collection: 03/01/1975 to 05/01/2004](#)

[Full text available from ScienceDirect Elsevier Science Journals: 1995 to present](#)

[Full text available from Wilson OmniFile: Full Text Mega Edition: 01/01/1996 to present](#)

LOCATION	CALL NO.	Item Status
INTERNET	<a href="#">Z671</a>	INTERNET

Frequency Bimonthly  
 Pub date Print began in 1975  
 Note Description based on: Vol. 21, issue 1 (1995); title from contents screen (ScienceDirect viewed Dec. 5, 2003)  
 Latest issue consulted: Vol. 29, issue 5, viewed Dec. 5, 2003  
 Access Access restricted to authorized UM users

[Register](#) or Login:  user name  Password:

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[Books](#)
[Abstract Databases](#)
[My Profile](#)
[Alerts](#)

Quick Search:  within This Journal  [Search Tips](#) WELCOME GUEST

### The Journal of Academic Librarianship

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- [Volume 31](#)
  - [Volume 31, Issue 3](#), Pages 179-303 (May 2005)
  - [Volume 31, Issue 2](#), Pages 89-178 (March 2005)
  - [Volume 31, Issue 1](#), Pages 1-87 (January 2005)
- [Volume 30](#)
- [Volume 29](#)
- [Volume 28](#)
- [Volume 27](#)
- [Volume 26](#)

## Direct Links - Benefits

- Delivers the most intuitive path for patrons
- Provides the richest information in the OPAC
- Eliminates the need for an extra click
- The most widely installed linking option

# Full MARC Records: Hosted 856 Option

University of Rochester > River Campus Libraries > Voyager Catalog >

## Voyager Catalog

[New Search](#) [View Titles List](#) [Search](#)

[Place Requests](#) [My Account](#) [My Preferences](#) [My History](#)

Searched for: Journal Title = aba banking

Results: 3 of 4 records.

[Prev](#) [Next](#)

[Brief View](#) [Full View](#) [Table of Contents](#)

*ABA banking journal*

**Main Author:** [American Bankers Association.](#)

**Title:** ABA banking journal (Online)  
ABA banking journal [electronic resource]

**Imprint:** [New York, Published for the American Bankers Association by  
Simmons-Boardman Pub. Co.]

**Continues:** [Banking](#)

**Subject(s):** [Banks and banking Periodicals.](#)  
[Banks and banking United States Periodicals.](#)

**LOCATION:** \*Internet\*

**Internet Link(s):** [Full text.](#)

**Number of items:**

[Prev](#) [Next](#)

University of Rochester >

## Voyager Catalog

**ABA banking journal** (0194-5947)

from 01/01/1980 to present in [LexisNexis Academic \(UR access only\)](#)

from 01/01/1987 to present in [ABI/INFORM Global \(UR access only\)](#)

from 05/01/2003 to present in [Wilson OmniFile: Full Text Mega Edition \(UR access only\)](#)

[Back to top](#)

### Related Links

[Interlibrary Loan](#)

[Find Databases](#)

[Find Journals](#)

 ProQuest®

[Help](#)

[Basic Search](#)

[Advanced Search](#)

[Topic Guide](#)

[Publication Search](#)

Marked List : 0 articles

Interface language  
[English](#)

Databases selected: [Accounting & Tax](#), [ProQuest Newspapers](#), [ABI/INFORM Global](#) [NEW! Alerts and more...](#)

**American Bankers Association. ABA Banking Journal; New York**

Full text coverage: Jan 1987 (Volume 79, Issue 1) - current

[Browse Issues](#)

[Search Within Publication](#)

[Publication Information](#)

Date range: From:  To:  [Search](#) [Clear](#)

1-390 of 452

[< Previous](#) | [Next >](#)

[Oct 2004; Vol.96, Iss.10](#)

[Jan 1995; Vol.87, Iss.1](#)

[Oct 1985; Vol.77, Iss.10](#)

[Sep 2004; Vol.96, Iss.9](#)

[Dec 1994; Vol.86, Iss.12](#)

[Sep 1985; Vol.77, Iss.9](#)

[Aug 2004; Vol.96, Iss.8](#)

[Nov 1994; Vol.86, Iss.11](#)

[Aug 1985; Vol.77, Iss.8](#)

[Jul 2004; Vol.96, Iss.7](#)

[Oct 1994; Vol.86, Iss.10](#)

[Jul 1985; Vol.77, Iss.7](#)

# Customization Options: Hosting Options

## Hosted 856 - Benefits

- The data underlying the search results are updated daily
- The number of changed records that you receive will be reduced -- only deliver a changed record:
  - underlying record itself changes
  - a new journal is added
  - or all links to a journal are removed
- Using this option allows you to track the number of searches that originate from your catalog

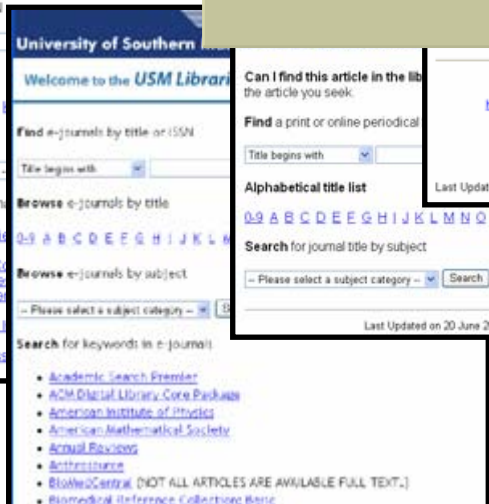
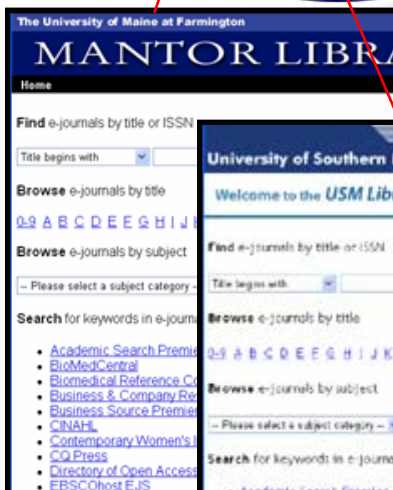
# Shared OPAC Linking with Hosted 856



Blake Library

## Group MARC Records

- Multiple libraries, each with its own E-Journal Portal
- MARC process automatically consolidates holdings with single 856 for each library with journal coverage
- Each library maintains its own data



# Shared OPAC Linking with Hosted 856

**URSUS**

Start Over Request Export MARC Display Return to Browse

More About the Book Another Search (Search History)

TITLE  View Entire URSUS Catalog

Record 2 of 2  
Record: [Prev](#) [Next](#)

Title **JAMA [electronic resource] the journal of the American Association**  
Publisher Chicago : American Medical Association

Click on the following link for electronic access:

- [Statewide Access](#)
- [Restricted Access \(UM\)](#)
- [Restricted Access \(UMA\)](#)
- [Restricted Access \(UMF\)](#)
- [Restricted Access \(UMFK\)](#)
- [Restricted Access \(UMPD\)](#)
- [Restricted Access \(LAW\)](#)
- [Restricted Access \(UMM\)](#)

Phys descr Print began with vol. 173, no. 9 (July 2, 1960)  
Note Description based on: Vol. 278, no. 1 (Aug. 6, 1997); title from title screen  
Latest issue consulted: Vol. 287, no. 2 (Jan. 9, 2002)  
Restricted to institutions with a site license  
Vols. for <2002-> online ed. covers latest six years (i.e. online issues cover 1997-2002)  
Mode of access: World Wide Web  
Subject [Medicine -- Periodicals](#)  
[Medicine](#)

Address <http://es5zk8wb9c.search.serialssolutions.com/?V=1.0&L=ES5ZK8WB9C&S=JCS&C=JAMATHEJOUOF>

UMF HOME SITE MAP SITE HELP

The University of Maine at Farmington

## MANTOR LIBRARY

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Title begins with

-- Please select a subject category --

**JAMA : the journal of the American Medical Association** (0098-7484)  
from 5 years ago to 6 months ago in [Highwire Press \(Free Journals\)](#)

[Back to top](#)

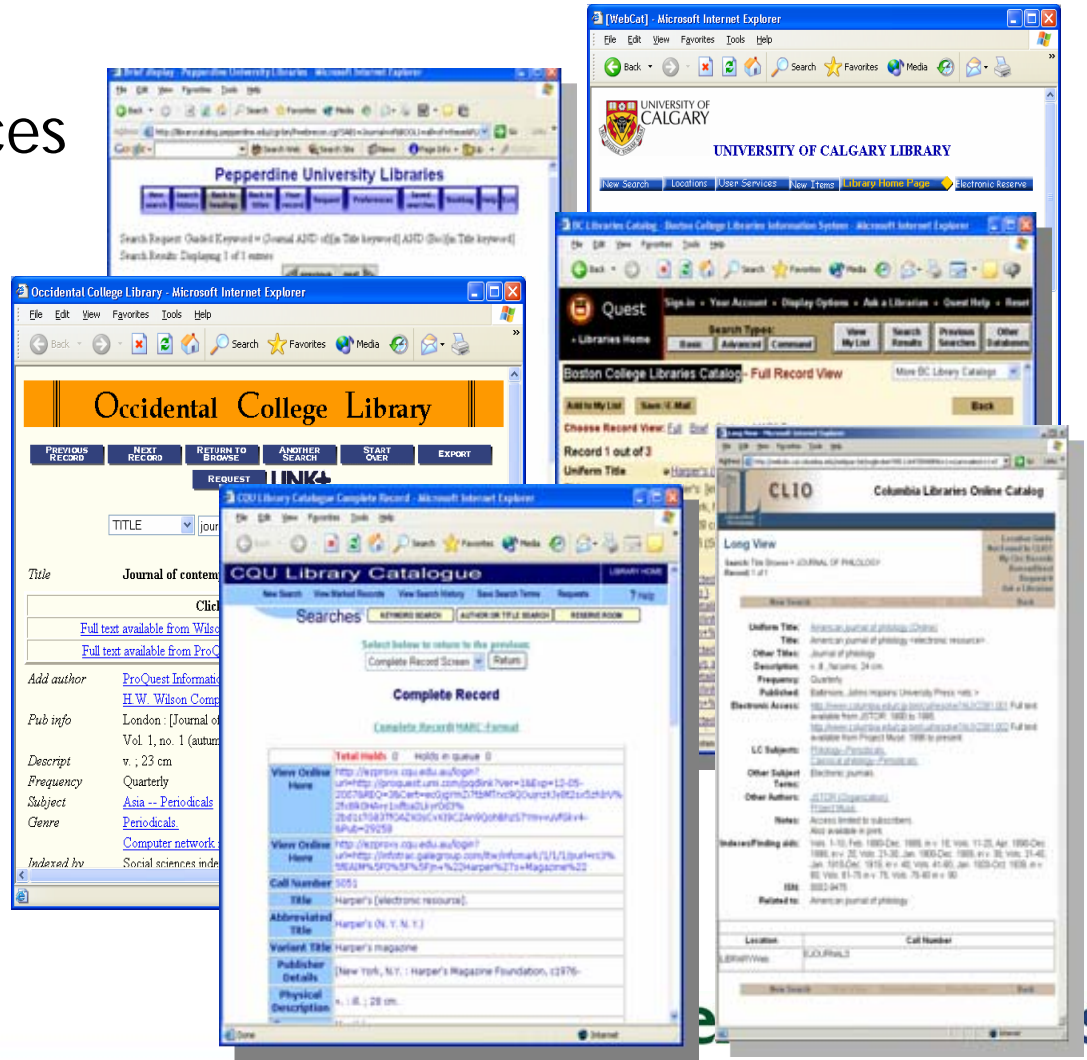
Last Updated on 3 October 2004 © 2000-04 [Serials Solutions, Inc.](#)

Internet

# Most Widely Installed Solution

Serials Solutions MARC records are in use with:

- Innovative Interfaces
- Endeavor
- SIRSI
- DRA
- Ex Libris
- Dynix
- VTLS
- others



# Benefits of Full MARC Records Service

- ✓ Reduce the workload associated with electronic resources
- ✓ Keep your online catalog as an accurate finding aid in the digital era
- ✓ Ensure consistency across your ILS, link resolver, and other library systems
- ✓ 100% coverage for your e-serials
- ✓ Virtually unlimited customization
- ✓ Best available bibliographic and holdings data

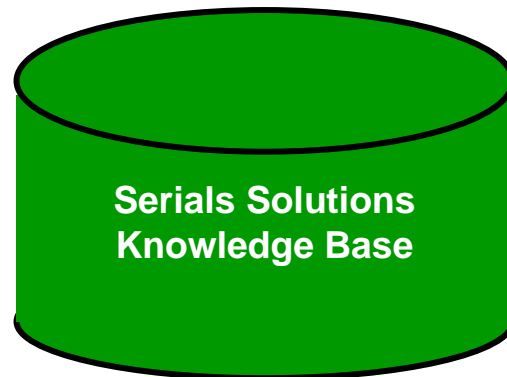


*The #1  
MARC updating service*

*The ONLY customized  
and comprehensive  
MARC Records updating  
service*

# Serials Solutions Integrated System Architecture

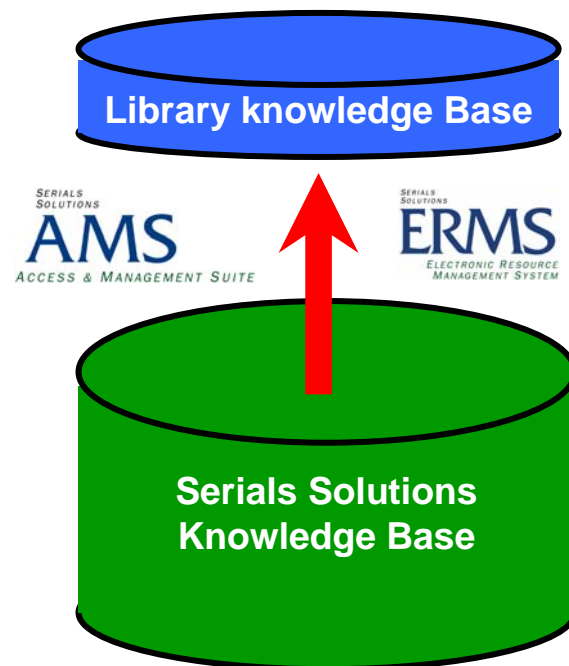
Global knowledge base tier  
maintained by Serials  
Solutions staff daily



# Serials Solutions Integrated System Architecture

Library-specific knowledge base maintained by library staff using Serials Solutions data management tools

Global knowledge base tier maintained by Serials Solutions staff daily

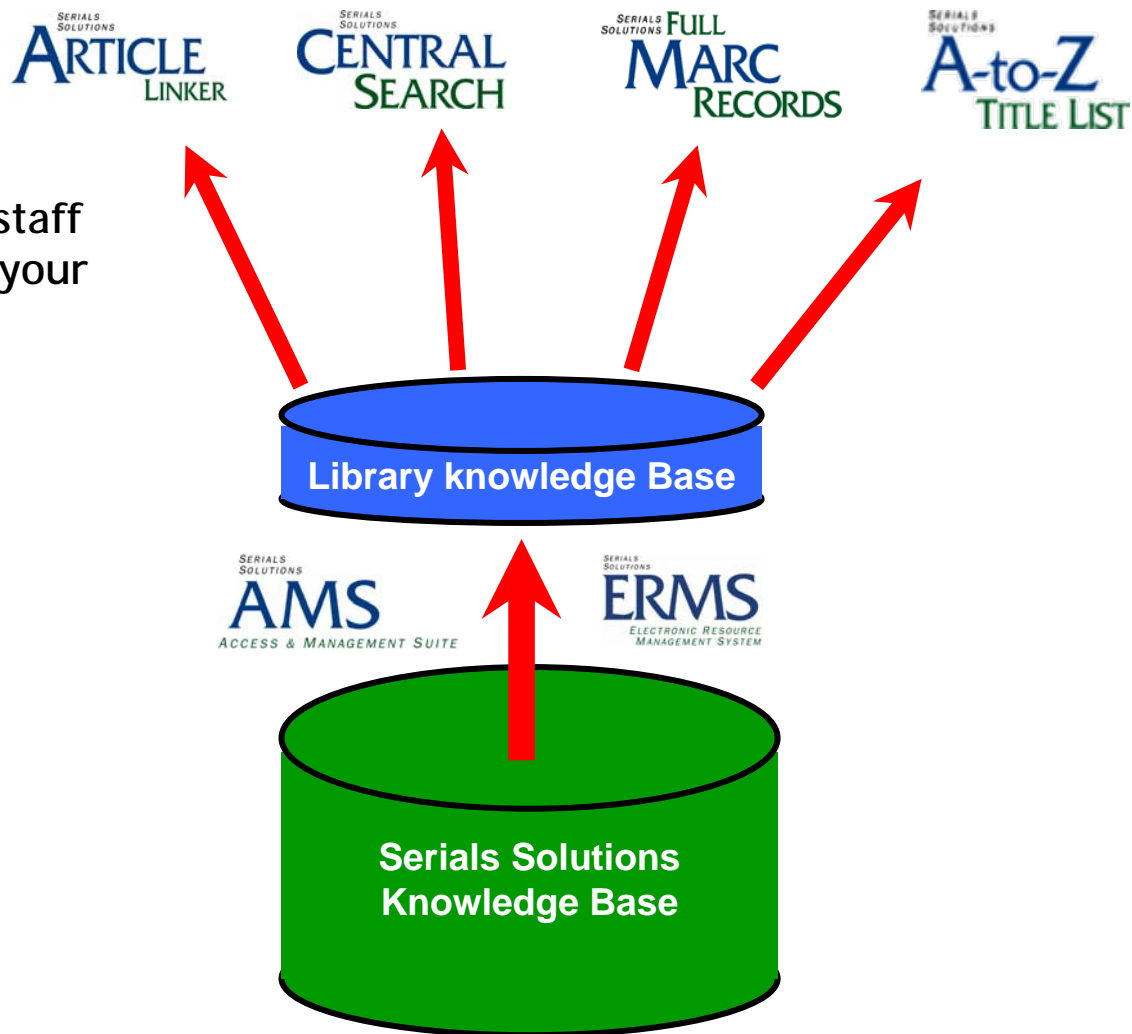


# Complete, Integrated Solutions

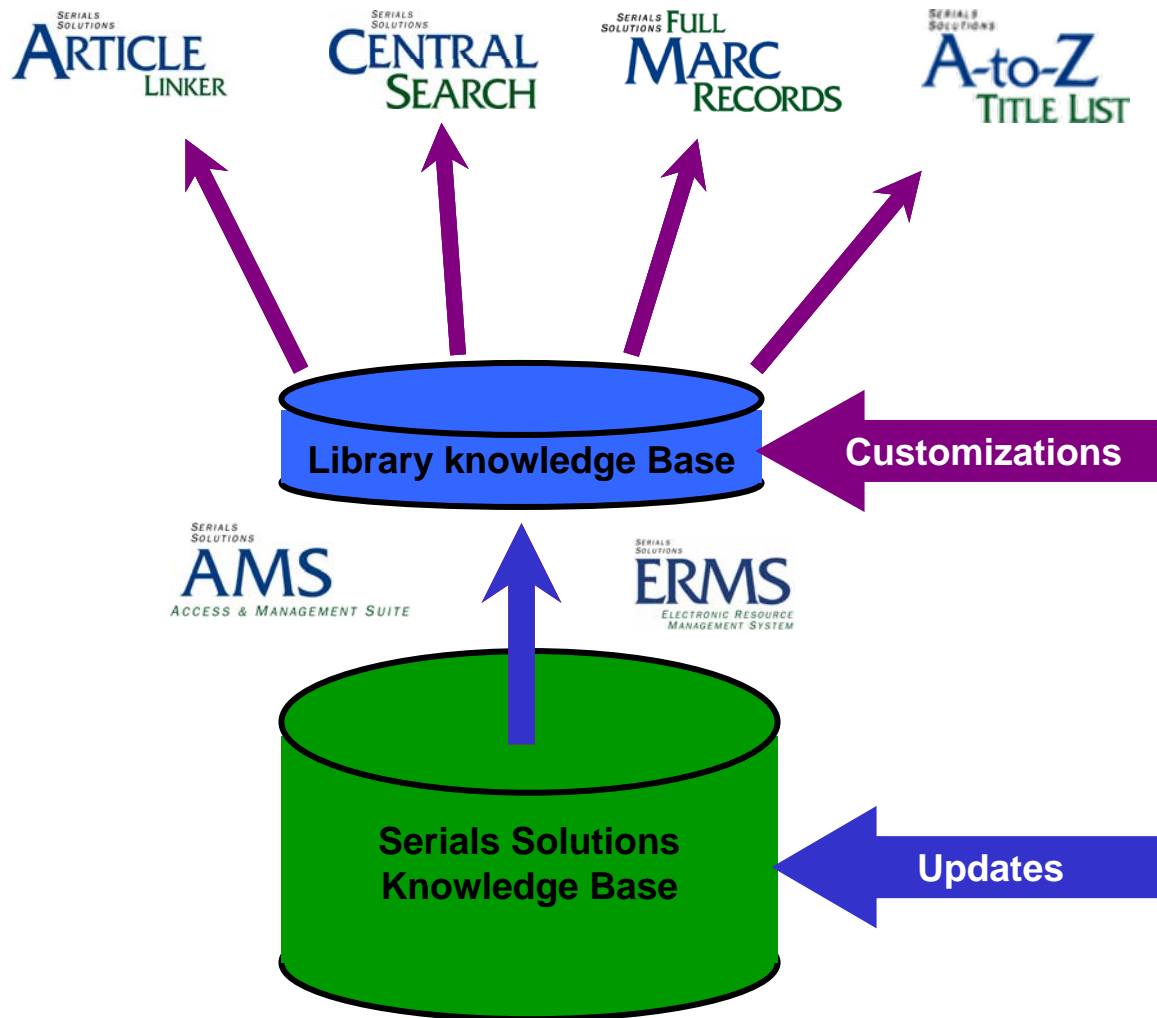
Resource discovery tier for staff and patrons to find and use your electronic resources

Library-specific knowledge base maintained by library staff using Serials Solutions data management tools

Global knowledge base tier maintained by Serials Solutions staff daily



# Complete, Integrated Solutions



# Knowledgebase Expansion

- Phased approach to adding material (media) types
  - 1<sup>st</sup> - e-books (ebrary, Safari, Ebook Library (EBL), Knovel)
    - EJP and AL - late June
    - MARC - late June
  - 2<sup>nd</sup> - dissertations and theses (timeframes not defined)
  - After that - music, art, integrating resources (items that are updated and are not serially published - websites, etc.)

# Knowledgebase Expansion Benefits

- MARC
  - Expanded coverage of vital e-resources
- E-Journal Portal
  - Additional e-resources to be displayed and available to patrons (increase the value of the electronic collection)
  - Licensing terms displayed to patrons
- Article Linker
  - Additional e-resources that can be accessed and utilized from various interfaces (increase the value of the electronic collection)
- ERMS
  - Management of majority of e-resources within single interface
    - Licensing terms and metadata management

# Thank you for your time!

Questions? Comments?

[jr@serialssolutions.com](mailto:jr@serialssolutions.com)

1-866-737-4257