EAST Cohort 2 Serials & Journals

Kick-Off Webinar
Webinar Agenda

• Introductions & Participating Libraries
• Project Timeline
• Data Questionnaire
• Data Extract:
  • Components and Upload
• Tasks:
  • Review Reports
  • Feedback about the retention model
• Participation in the Serials & Journals Working Group
Introductions

EAST Project Team is:

Susan Stearns, Project Director
Sara Amato, Data Librarian
Matthew Revitt, Shared Print Consultant
Mei Mendez, Project Manager
Participating Libraries

- New York University
- Syracuse University
- Vassar College
- Tufts University
- DeSales University
- UMass Medical Library
- University of Pittsburgh
- Hofstra University
- University of the South
- University of Rochester

Working with CRL for collection analysis
Data Questionnaire

EAST/CRL Data Questionnaire (Due March 15th, with data extract)

Send Questionnaire to Sara Amato & Mei Mendez

- Administrative information
- Systems information
  - Cataloguing Information:
    - In which MARC field is the bib record number stored?
    - In which MARC field is the OCLC record number stored?
    - Location of Holdings Information
• Guidelines for submitting the data, including exclusions:
  • Bib, item, & holdings data in MARC format (can be merged or in separate files)
  • Exclude: non serial records, non print records, gov docs, out of scope collections, microforms, locations from which article copies cannot be provided via pdf scans
• Instructions for naming the extract file
• Submit the data questionnaire to EAST Project Team (Sara Amato & Mei Mendez)
Guidelines for in-scope serials records:

- Leader position 07 (bib level) = s (serial)
- Leader position 06 (type of record) = a (language material)
- Not electronic (often determined by location code)
- 006/11 or 008/28 not blank or | = government document (exclude these)
- Valid OCLC number (e.g. not ssj###)
- Not suppressed / withdrawn (may not apply in most libraries)

Records can be sent in a single or multiple files. For file naming, please use [brief library name]_yyyymmdd_all if all records are in one file or use [brief library name]_yyyymmdd_bibn if there are multiple files, with n denoting the file number.
Data Extract - ILS Specific Instructions

Data Extract -
Libraries will provide CRL with a marc extract of their bib and holdings records, along with a completed questionnaire:

EAST/CRL Serials and Journals Collection Analysis Data Extract Questionnaire

If a library is unable to provide a marc extract, a csv file may suffice, provided it follows these guidelines: Fields Required for CSV Holdings File.

ILS Specific Instructions:

- Aleph (NYU)
- Millennium (Tufts)
- Sierra (Hofstra, University of the South, Vassar)
- Voyager (Syracuse, University of Pittsburgh, University of Rochester)
- WMS (UMass Medical, Desales)
If bib and holdings data are in separate records, either in the same or separate files, please note which record ID / field maintains their relationship.

For naming files which hold only item or holdings records, please use `[brief library name]_yyyyymmdd_itemn` or `[brief library name]_yyyyymmdd_holdingsn`. If there is only one of each, there is no need to add a number.
Uploading Data Extract

Uploading extract to CRL's FTP server:
URL: ftp://records.crl.edu

Login and password information will be provided in a follow up email.

We are happy to assist submitting data if needed!
Tasks

Serials Retention Partners:

• Complete and deliver the Data Questionnaire and Data Extract by March 15th
• Nominate one representative to participate in the Serials/Journals Working Group (if interested) by March 31st.
• Provide input into the retention model for widely held titles by July 31st.
• Review allocated retentions, perform optional validation, & accept/reject allocations during Fall 2018
• Record retention commitments in local ILS & CRL PAPR database following EAST guidelines during Spring 2019
Serials & Journals Working Group

• Membership is not mandatory.
• Currently composed of Cohort 1 libraries.
• Open to Cohort 2 libraries as members rotate off.
• The S&J Working Group:
  • Reviews reports from CRL to determine scope of the project.
  • Recommends retention model based on their review.
  • Can draft guidelines for recommendation to the Operations Committee
• Depending on the project cycle, may meet bi-weekly or monthly via webinar
• Members are recognized on EAST website and via letter of acknowledgement from EAST Executive Committee
For Cohort 2 Monographs & Serials Retention Partners

Upcoming deadlines:
March 15th: serials data extract & questionnaire
March 31st: sign and return MOU
nominate representative for Serials & Journals WG
Thank you!

Please email Sara Amato, Mei Mendez, and Matthew Revitt with any questions about the extract or timelines:

Sara Amato: samato@blc.org
Mei Mendez: mmendez@blc.org
Matthew Revitt: matthew.revitt@maine.edu