

EAST Cohort 2 Serials & Journals

Kick-Off Webinar



BLC

BOSTON LIBRARY CONSORTIUM



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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



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Introductions

EAST Project Team is:



Susan Stearns,
Project Director



Sara Amato,
Data Librarian



Matthew Revitt,
Shared Print
Consultant



Mei Mendez,
Project Manager

Participating Libraries

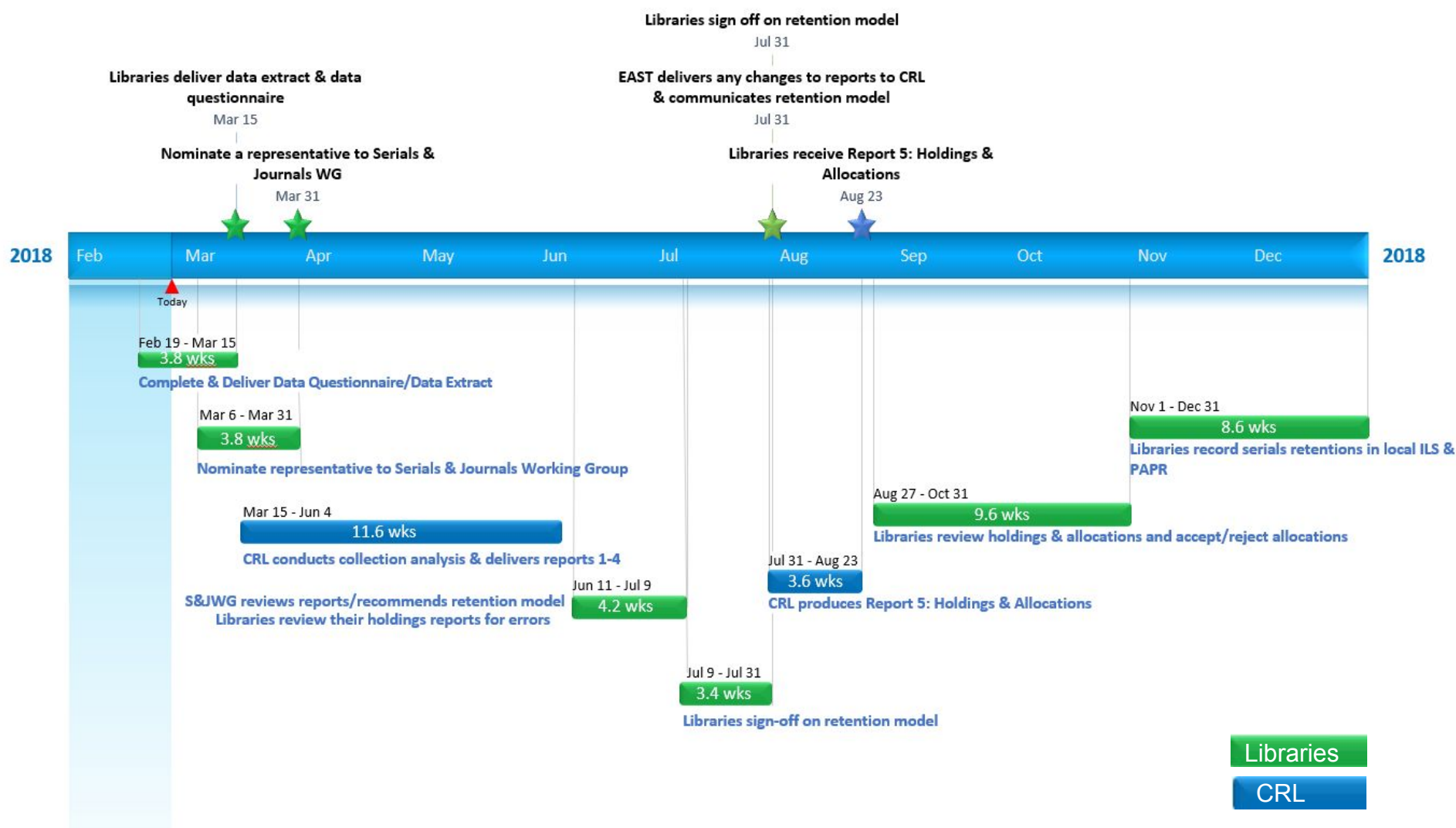
- New York University
- Syracuse University
- Vassar College
- Tufts University
- DeSales University
- UMass Medical Library
- University of Pittsburgh
- Hofstra University
- University of the South
- University of Rochester

Working with CRL for
collection analysis



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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



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Data Questionnaire, II

- 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](#))



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Data Extract

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- Not suppressed / withdrawn (may not apply in most libraries)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

<https://sites.google.com/a/blc.org/sjwg/data2>

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)



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Data Extract, II

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.

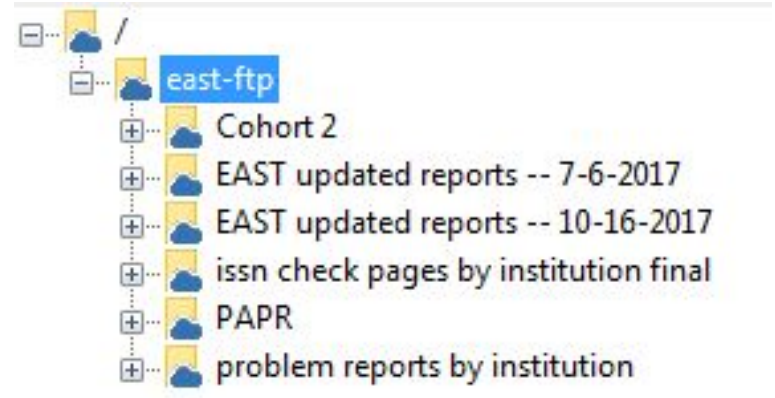
For naming files which hold only item or holdings records, please use **[brief library name]_yyyymmdd_itemn** or **[brief library name]_yyyymmdd_holdingsn**. If there is only one of each, there is no need to add a **number**.

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 PAPER 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



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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