

Clarifying the Choices: E-Resource Metadata Strategies & Criteria

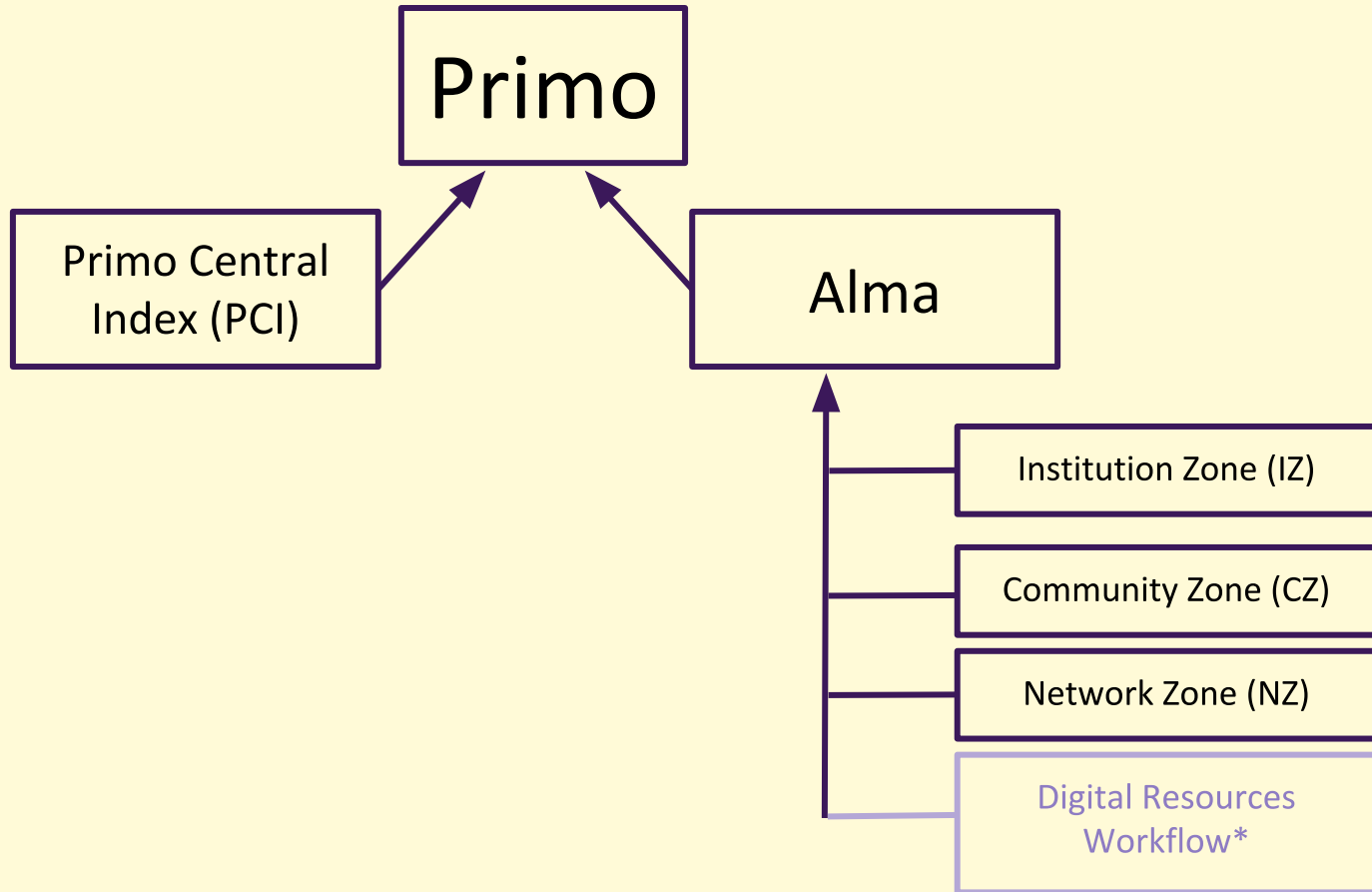
Erin Grant, Director, Cataloging & Metadata Services
Steve Shadle, Head, Serials Cataloging Unit

UNIVERSITY LIBRARIES









Outline

- Primo Overview
- Sources of E-Resource Metadata
- UW E-Resource Metadata Strategies
 - E-Journals
 - E-Books
- Continued Challenges
- Q&A



Primo Display

CZ	1	 JOURNAL 99 Chemical vapor deposition (Online) 1995- Weinheim : Verlag & Co. KGaA : VCH Verlagsgesellschaft ; Deerfield Beach, Fla. : VCH Publishers Online access >
NZ	2	 JOURNAL 99 Chemical vapor deposition : CVD. 1995- Weinheim, Germany : VCH Verlagsgesellschaft ; Deerfield Beach, Fla. : VCH Publishers Check request options - held by Summit libraries >
PCI	3	 BOOK CHAPTER 99 Chemical Vapor Deposition Carlsson, J.-O. ; Martin, P.M. 2010 Handbook of Deposition Technologies for Films and Coatings, pp.314-363 Check for online access >
PCI	4	 BOOK CHAPTER 99 Chemical Vapor Deposition Campbell Stephen A 2008 Oxford University Press Fabrication Engineering at the Micro- and Nanoscale Check for online access >
CZ	5	 EBOOK 99 Chemical Vapor Deposition Jong-Hee Park T. S. Sudarshan 2001 Materials Park : A S M International Online access >
IZ/NZ	6	 PRINT BOOK 99 Handbook of chemical vapor deposition Hugh O. Pierson 1999 Norwich, NY : Noyes Publications Check request options - checked out from UW >

Sources of E-Resource Metadata

- Primo Central Index (PCI)
- Alma Community Zone (aka CZ, Central KnowledgeBase or CKB)
- OCLC WorldShare Collection Manager (loaded to NZ or IZ)
- Vendor Records (loaded to NZ or IZ)
- Manual OCLC Cataloging (appearing in NZ/IZ)
- Locally curated metadata *[if using Digital Resource workflow]*

PCI Overview

Citation metadata for 4,200 collections from ~400 providers and institutional repositories

Primarily analytic content not included in library catalog (journal/newspaper articles, book chapters) but also includes citations for monographs, videos, images and other web resources

On/off activation

Managed via Primo, records don't appear in ALMA

PCI Pros and Cons

Pros

- Automatic harvest based on customer profile
- Provides article/chapter-level discovery
- Metadata is more current than other sources

Cons

- Can only preview metadata by activating in Primo sandbox
- Delay because of weekly publishing cycle
- All or nothing approach to collections (not selective)

CKB Overview

Over 10,000 collections sourced from over 1,200 providers

Primarily licensed content with some open access content

Used to support electronic resource management and acquisitions but also includes MARC catalog records

Activate entire collections or selective titles in collections

Records managed in Alma CZ; when activated appear in IZ/NZ

CKB Pros and Cons

Pros

- ERM workflow activation automatically brings bibliographic records into NZ/IZ. No managing record sets.
- Maintenance can happen centrally
- Can preview MARC records before activating

Cons

- Collection names hard to match to purchases
- Hard to tell how current collections are
- Bibliographic record quality varies greatly

OCLC WorldShare Overview

E-Resource MARC records for licensed and OA content

- OCLC records when matched by algorithm

22,000 collections sourced from 7,000 providers

- Libraries can also contribute collections

Collections: Non-Customizable, Customizable, Query

Records output in separate New/Updated/Delete files

Files of MARC records are loaded into Alma IZ/NZ

OCLC WorldShare Pros

- Records are generally better quality & have OCLC numbers
- Collection flexibility & cooperation
 - Copy/create local collections
 - Share collections
 - Update title info in existing collections
- Automation/Integrations
 - OCLC holdings, Google Scholar
 - Alma imports (potentially)
- Automatic collection loading available for some vendors

OCLC WorldShare Cons

- Collection names hard to match to purchases
- Deleted records not always reliable
- Record set management requires staff expertise/time and learning curve
 - Basics, loading
 - KBART/custom collections
 - Automating record loads in Alma

Vendor Records Overview

Metadata (MARC or non-MARC) obtained directly from publisher/provider

Metadata loaded locally into NZ/IZ

Wide variances between vendors

- Metadata quality
- Provision method
- Record updates

Vendor Records Pros and Cons

Pros

- More likely to accurately reflect currently licensed titles

Cons

- May be a fee for records
- In the case of the Alliance, requires rights to distribute records to other consortial partners (NZ)
- Record set management much more complex and time consuming as conditions vary for each provider
- May require record changes

Manual Cataloging

Overview not really needed :)

Pro

- Best/known metadata quality

Cons

- Most labor-intensive option
- Inability to scale



Worker by James Keuning, Noun Project

E-Books vs E-Journals Strategies

Require different strategies

- Discovery and access
 - E-Journals: article vs title access, link resolution
 - E-Books: title-level record is method of access
- Record distribution
 - E-Journals: CONSER file (in CZ)
 - E-Books: No mono counterpart to CONSER

UW E-Journals Metadata Strategy

General Principles

- Profile as much as possible in CZ to support article-level access (openURL). This includes adding random OA serials to “Miscellaneous Free” collections
- Contribute to the CONSER file (DOAJ, Alma Funnel)
- Limit full-level manual cataloging to non-journal serials (annual reports, reference works, zines)

UW E-Books Metadata Strategy

General Principles

- Balance between most complete metadata and most efficient way to obtain and maintain
- Get OCLC numbers where available
- 1st preference OCLC WSCM collections
- 2nd: CKB or vendor sets
- Manual cataloging or PCI collection last choice

Continued Challenges

- Collections available from PCI and other record sets
- Mixed serial/mono vendor record sets
- New CKB/OCLC KB collections for content already in local packages
- Leveraging Alma for better metadata management

PCI vs OCLC Record Set

Metadata from a small number of collections is available from both sources

OCLC

PCI

The screenshot shows a search interface with the query "challenge of conflict among allies" in the search bar. The results are displayed in a list format with 4 results. The first result is an EVIDEO titled "The challenge of conflict among allies : risks and opportunities" by Melba Jean Trinidad Vasquez, published by Alexander Street Press in 2009. The second result is a DVD VIDEO titled "The challenge of conflict among allies : risks and opportunities" by Melba Jean Trinidad Vasquez, published by Microtraining and Multicultural Development (Firm) in 2007. The third result is an EVIDEO titled "The challenge of conflict among allies : risks and opportunities" by Vasquez, Melba Jean Trinidad, published by Alexander Street Press (Corporate Author) and Microtraining Associates (Corporate Author) in 2009. Each result includes a play button icon, a quote icon, a link icon, a star icon, and a more options icon. The search interface also includes a "Save query" button and a "Library Resources" dropdown menu.

EVIDEO

The challenge of conflict among allies : risks and opportunities

Vasquez, Melba Jean Trinidad Alexander Street Press (Corporate Author) ; Microtraining Associates (Corporate Author)
2009 Alexander Street Press

[Check for online access](#)

PCI

ITEM DETAILS

View It

[Link to Online Resource](#)

LINKS

Item Details

Title The challenge of conflict among allies : risks and opportunities

Author Vasquez, Melba Jean Trinidad >
Alexander Street Press (Corporate Author) >
Microtraining Associates (Corporate Author) >

LCSH and PCI subjects Ethnopsychology >
Intercultural Communication >
Interpersonal Conflict >

Description While most subscribe to multicultural goals and ideals, conflict occurs within the multicultural community--women and men, the gay community and some People of Color, the disabled and the temporarily able, and many other groups. These divisions do not support progress against societal oppression. This outstanding presentation presents lively vignettes and stories of key issues and has many suggestions for understanding and resolution.
Duration: 63 min.

Publisher Alexander Street Press

Publication Date 2009

Language English

Links

[Access content in Alexander Street Press](#)

EVIDEO

The challenge of conflict among allies : risks and opportunities

Melba Jean Trinidad Vasquez Microtraining Associates.
©2009 Place of publication not identified : Alexander Street Press

[Online access](#)

OCLC

LINKS

View It

[Counseling and therapy in video](#) [\[view license terms\]](#)

Public notes:
UW restricted

Item Details

Title The challenge of conflict among allies : risks and opportunities

Local titles Counseling and Therapy in Video 1

Author Melba Jean Trinidad Vasquez >
Microtraining Associates. >

LCSH and PCI subjects Intercultural communication >
Interpersonal conflict >
Ethnopsychology >
Psychology video >

Description While most subscribe to multicultural goals and ideals, conflict occurs within the multicultural community--women and men, the gay community and some People of Color, the disabled and the temporarily able, and many other groups. These divisions do not support progress against societal oppression. This outstanding presentation presents lively vignettes and stories of key issues and has many suggestions for understanding and resolution.
Title from title frames.
Accompanied by transcript of program, clips and abstract.
Issued as part of the Counseling and therapy in video collection.
Originally produced in 2007.

Publisher Place of publication not identified : Alexander Street Press

Publication Date ©2009

Format 1 online resource (1 streaming video file (63 min.))

Language English

OCLC Number 489469830

Alma IZ record number 99142626650001452

Alma NZ record number 99109690850001451

Genre/form Video recordings; Video recordings; Video recordings >

Related works and collections Counseling and therapy in video. >
Series: Counseling and therapy in video. >

Links

[Alexander Street](#) >
[Alexander Street](#) >
[Alexander Street](#) >
[Alexander Street](#) >
[Link to Resource](#) >
[Access restricted to subscribers.](#) >
[Alexander Street](#) >

Considerations in choice of metadata source:

- PCI more timely
- OCLC requires record set management
- OCLC has genre headings and series tracings
- OCLC has more detailed description
- OCLC has multiple links (MARC 856 residue)
- OCLC has OCLC holdings set
- OCLC has link to license terms

Mixed Mono/Serial Record Sets

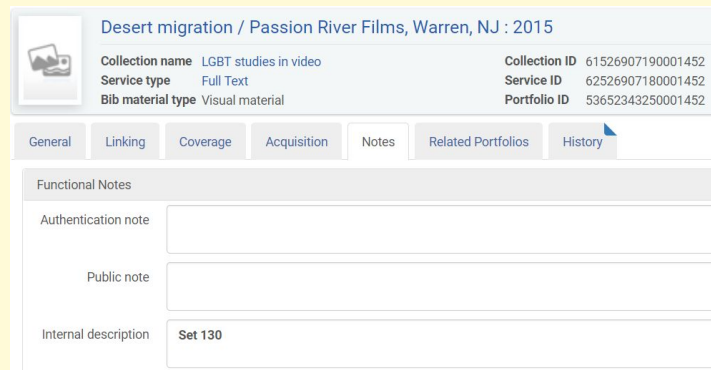
- Vendor set records typically lack coverage data which is important for openURL resolution
- For serial records not typically indexed in PCI (zines, reference materials), vendor set records are processed using the same import profile as monographs

New Collections for Local Content


- New collections available for content we manage locally (vendor records or manual cataloging)
- Requires undoing old work but often worth it
- Haven't figured out systematic workflow to check for new collections
- NERS content voting strategy

Leveraging Alma for Better Management

- Getting away from relying on external spreadsheets so much
- Current: Record set numbers in Portfolio - Internal Description
- Future: standardize management notes, retrospectively apply, develop dashboards
- Getting data out for migration?



Desert migration / Passion River Films, Warren, NJ : 2015

	Collection name LGBT studies in video	Collection ID 61526907190001452
	Service type Full Text	Service ID 62526907180001452
	Bib material type Visual material	Portfolio ID 53652343250001452

General Linking Coverage Acquisition Notes Related Portfolios History

Functional Notes

Authentication note

Public note

Internal description **Set 130**

THANK YOU!

Erin Grant: egrant2@uw.edu
Steve Shadle: shadle@uw.edu

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