University of Rhode Island
DigitalCommons@URI

Serials Unit Reports

9-1-2006

Serials Unit Annual Report 2004-2006

Andree J. Rathemacher
University of Rhode Island Library, andree@uri.edu

Follow this and additional works at: http://digitalcommons.uri.edu/ser_rpts

Part of the Library and Information Science Commons

Recommended Citation
Rathemacher, Andree J., "Serials Unit Annual Report 2004-2006" (2006). *Serials Unit Reports.* Paper 1.
http://digitalcommons.uri.edu/ser_rpts/1

This Article is brought to you for free and open access by DigitalCommons@URI. It has been accepted for inclusion in Serials Unit Reports by an authorized administrator of DigitalCommons@URI. For more information, please contact digitalcommons@etal.uri.edu.

Serials Unit Annual Report 2004-2006

Note: This is not a "proper" annual report, but a list of accomplishments during the time periods specified. 1/7/2008 ajr

October 2003-2004

Personnel

- Fall 2004: Offered Round-Robin sessions for library staff on work of Unit.

Subscriptions / collection

- Initial set up of Serials Solutions A-Z List for URI (October 2003)

Database maintenance

- Processing staff (Jackson, Contois) and their students conducted an inventory of the Current Periodical Room, updated records for titles that had been cancelled, removing shelf labels, etc.

2004-2005

Personnel

- Summer 2004: Trained Joyce Downey of Pell in how to use HELIN Acquisitions System for serials (setting up order records, etc.). In December, showed her how to process EBSCO invoice electronically.

- Fall 2005: Offered Round-Robin sessions for library staff on work of Unit.

- April 2005: Farrell (Library Technician responsible for ordering, paying invoices, checkin of annuals) retired. Remaining Library Techs doing her work on overtime (12 hrs. a week.) Required additional training of Contios (paying invoices) and Thompson (checking in annuals, printing labels).

- Worked with Ramsay to create updated, “generic”, position description for Library Technicians in MACC / Serials. Also created updated lists of the job responsibilities of each position in the Serials Unit.

- Consulted with Library Technicians in Serials Unit (Contois, Thompson) in filling out “desk audits” in hopes of being upgraded to Information Services Technician I’s.

Procedures

- Provided training to staff in running Millennium automated claim checker.

- Implemented claiming of print issues not received using automated Millennium claim checker. Developed procedures for staff run claims checker weekly.

- Developed procedure to use III to automatically count pieces checked-in each month, eliminating need for keeping a manual count.

- Updated the following procedure documents, creating illustrated guides on how to accomplish the following:
    - Invoices – validating and processing
    - Invoices – posting manually
    - Invoices – posting EDI invoices (e.g. big EBSCO invoice)
    - Order records – creating and maintaining
    - Checkin – annuals, etc.
    - Claims – sending claims and following up
    - Mail – handling Serials Unit mail

- Developed procedure for ordering one-time-only serials on a regular basis, by attaching a checkin card that will try to "claim" new issue at the specified interval for reordering.

- Began gathering monthly statistics on "hits" to Library Web page (home page and top pages on site) and how this compares to other pages on campus.

- Initial documentation of statistics-gathering procedures for statistics required by annual surveys (ACRL, NCES).

Subscriptions / collections

- Activated Serials Solutions Article Linker (August 2004). This required working with Serials Solutions to select preferences for the Library and then configuring each Reference Database and e-journal portal that supported OpenURL linking by contacting the vendor or accessing the online administrative module.

- Converted to online-only for 2005 subscriptions from the following publishers:
    - American Association on Mental Retardation
    - American Institute of Aeronautics and Astronautics
    - American Society of Agronomy
    - Chronicle of Higher Education
    - **Sage**
    - **Taylor & Francis**
    - American Mathematical Society
    - American Fisheries Society
    - OECD
    - Duke University Press
    - Endocrine Society
    - Other miscellaneous titles

- Set up electronic access to new 2005 online only and print + free online subscriptions.
    - Signed and submitted license agreements where required.
    - Activated URI IP-authenticated access on publisher sites and/or contacted publishers by e-mail.
    - Selected journals in Serials Solutions client center

- Asked PELL for an EBSCO-generated list of all their subscriptions. Made sure any online-only and free online with print were set up and selected in Serials Solutions. Updated PELL order records with additional information as needed.

- Signed license agreement and began access e-Duke collection of journals from **Duke University Press**.

- Signed license agreement and began access to site license to **Chronicle of Higher Education** online.

Database maintenance

- In preparation for using III automated claim checker, examined checkin records and deleted checkin cards for journals that had been cancelled (which had not been done). This prevented the automated claim checker from creating false claims for issues from titles that had been cancelled.

- Updated checkin records, especially subscription number field, to enable automated claiming. [Whenever a title becomes available print+free online, EBSCO automatically changes our subscription from print only. But this means the EBSCO title number changes, and so the "s" field in the checkin record needs to be updated if claiming is going to function correctly.]

- Updated checkin records with MARC-format call numbers, removed extraneous information (e.g. vendor codes and subscription numbers for cancelled titles).

- Closed out records for titles no longer received in print and sent for final binding.

- Created suppressed bibliographic records for titles received online.

- Updated and transferred order records for online titles from print record to suppressed online record.

- Created item records for online only journals.

- Created a monthly list of "Serials Solutions deletes" for URI and removed URI from the location field. (Note: Serials Solutions MARC records first loaded in October 2004.)

- Removed obsolete note fields from bib records when encountered (e.g. faxon number, See Serials List for holdings, etc.)

- Implemented new I-CODE 2 codes to distinguish between print serials, online serials, reference databases, etc.

Miscellaneous

- Updated *Serials Unit Goals* (May 2004).

- Hosted the LinkFinderPlus Task Team from the University of Connecticut Babbidge Library for the day. The Team was conducting an environmental scan of open URL link resolvers, and wanted to make a site visit to URI to learn about and test our implementation of Serials Solutions' ArticleLinker. Four people came on Friday, June 17, 2005 : Jill Livingston (reference), Deb Sanford (acquisitions), Dave Bretthauer (network services), and Shirley Quintero (applications developer).

- Worked with GSLIS student Cheryl Ladd on Professional Field Experience in which she gathered usage statistics for a number of Reference Databases and documented how to access them.

2005-2006

Personnel

- Provided training to staff in the following electronic services, covering basic use as well as "advanced" search strategies:
    - EBSCONET
    - WorldCat

Procedures

- After HELIN upgrade after which posting and processing invoices (both manually and using EDI) could only be done in Millennium, updated procedures documents for posting invoices in Millennium and trained staff in new procedures.

- Began following up on claims using EBSCONET online Claim Checker. This allows the status of claims to be checked in a more timely manner than waiting for a printed claims list from EBSCO. It also allows us to post second claims directly, and to remove claims.

- Created "Mystery Title" slip, a set of steps for check-in technicians to follow when handling a title they had not seen before. The slip has spaces to fill in EBSCO title number, former title, OCLC number, etc., so that whomever the item is passed on to does not have to look up the information again.

- Assigned usage-statistics gathering tasks for a few databases to two Library Technicians so that they can get used to the process. As templates are ready and titles to check in and

bind decrease, staff will be assigned more statistics-gathering.

Subscriptions / collection

- Identified close to $20,000 worth of subscriptions that were duplicated in online collections, had become open-access, etc. Cancelled about 75 titles for 2006.

- Due to online duplication, was able to cancel a large number of microfilm subscriptions, cutting UMI invoice in half, saving approximately $8,000.

- Converted to online-only for 2006 subscriptions from the following publishers:
    - **Annual Reviews**
    - **ACM**
    - American Society for Microbiology
    - Cambridge University Press
    - Human Sciences Press
    - INFORMS
    - IEE Digital Library
    - IOP
    - **Wiley**
    - **Kluwer / Plenum / Springer**
    - Lawrence Erlbaum
    - NRC Research Press
    - Optical Society of America
    - **Oxford University Press**
    - University of Chicago Press
    - University of California Press
    - **Lippincott, Williams & Wilkins (Journals@OVID)**
    - American Society of Civil Engineers
    - Miscellaneous other titles

- Signed license agreement and began access to **ScienceDirect Freedom Collection**, which includes almost all journals published by Elsevier and its subsidiaries (with the exception of some society press titles).

- Signed license agreement and began access **JSTOR** full collection.

- Set up electronic access to new 2006 online only and print + free online subscriptions.
    - Signed and submitted license agreements where required.
    - Activated URI IP-authenticated access on publisher sites and/or contacted publishers by e-mail.
    - Selected journals in Serials Solutions client center

Database maintenance

- Closed out records for titles no longer received in print and sent for final binding.

- Created suppressed bibliographic records for titles received online.

- Updated and transferred order records for online titles from print record to suppressed online record.

- Created item records for online only journals.

- Updated checkin cards, especially subscription number field, to enable automated claiming. [Whenever a title becomes available print+free online, EBSCO automatically changes our subscription from print only. But this means the EBSCO title number changes, and so the "s" field in the checkin record needs to be updated if claiming is going to function correctly.]

- Created a monthly list of "Serials Solutions deletes" for URI and removed URI from the location field.

- Removed obsolete note fields from bib records when encountered (e.g. faxon number, See Serials List for holdings, etc.)

- Had HELIN Systems Librarian update default data and user prompt data for creating serials checkin, order, and item records.

- Set "Function Keys" for Millennium serials login so that labels could be printed in a more efficient way, with less margin for user error.

Future projects (some staffing-dependent)

Personnel

- Train staff in:
    - Creating lists in Millennium
    - Excel (for statistics sheets)
    - Using Serials Solutions A-Z List
    - How Serials Solutions Client Center works
    - HELIN record types & data fields (order records, checkin/holdings records) – review

- Make sure all Serials Unit staff are cross-trained in essential Unit activities

Procedures

- Investigate possibility of receiving monthly EBSCO invoices electronically.

- Continue documentation of Unit procedures (checkin, etc.)

- Continue documentation of all of the statistics the Serials Unit tracks — what statistics are gathered and how gathered. Consider whether or not any additional statistics should be kept. Automate statistics-gathering process whenever possible.

Subscriptions / collection

- Continue to convert subscriptions to online-only when revenue-neutral.

- Create spreadsheet template and instructions for accessing all *online journal* usage statistics (usually grouped by publisher or access service, e.g. IngentaConnect, Highwire, MetaPress). Train checkin staff in accessing statistics and using Excel. Assign staff to gather statistics monthly. Distribute on a regular basis.

- Identify microform holdings duplicated in print (or through subscriptions to online archives) and withdraw mform.

- Consider what to do with bound print journal holdings that are duplicated online.

- For print titles that will be maintained, do an inventory of holdings & missing issues.

- Systematically check all current database subscriptions / e-journal packages & providers to see if they support OpenURL, and if they do, make sure they are set up to work with Serials Solutions Article Linker.

- Consider loading print serial holdings into Serials Solutions.

Database maintenance

- Make a list of gift subscriptions and close out any that are inactive.

- Code order and checkin records of serials that are part of combination subscriptions. (Report can be generated by EBSCO.)

- Code order records of titles that are "bill later." (Report can be generated by EBSCO.)

- If time allows, make sure every individual paid-for title (print or online) has both an item record and an order record, even titles in packages such as ScienceDirect. This makes statistics-gathering easier and more accurate. It also provides for more quickly determining where an active title "comes from."

- Investigate possibility of assigning multiple subject fund codes to order records, potentially allowing for interdisciplinary coding. And/or work with Collection Management Officer to simplify department-based subject coding system.

- Read about how to put multiple locations in .c, .i, and/or .o records (located in part of manual about setting up these records initially) Investigate possibility of assigning multiple location codes to records to potentially allow for enhanced searching and sorting of records.