Working with e-resource metadata

Beyond Hope Conference, Prince George, BC
Monday June 6th, 2011

Paul Burry
Prince George Public Library
Working with e-resource metadata

- Loading and modifying records
- Evaluating records
- Maintaining collections
- BC Legislative Library Gov. Docs Project
UNBC: Growth in E-Resources

UNBC E-Books

- **Bibliographic Records**
  - UNBC E-Books
  - Working With E-Resource Metadata

- **Electronic Book**
  - Graph showing growth from 2003-04 to 2009-10
  - Records:
    - 2003-04: 2323
    - 2004-05: 2557
    - 2005-06: 4645
    - 2006-07: 4777
    - 2007-08: 12741
    - 2008-09: 41460
    - 2009-10: 62834

- Data points:
  - 2003-04: 2323
  - 2004-05: 2557
  - 2005-06: 4645
  - 2006-07: 4777
  - 2007-08: 12741
  - 2008-09: 41460
  - 2009-10: 62834
UNBC: Growth in E-Resources

UNBC: percentage of bibliographic records loaded by material type

**2003-04**
- Language Material (books): 77%
- Electronic Books: 12%
- Microform Material: 6%
- Projected Medium (DVD, slides, etc.): 2%
- Cartographic Material: 3%

**2009-10**
- Electronic Resources: 28%
- Electronic Books: 60%
- Language Material (books): 12%
PGPL: Growth in E-Resources

PGPL E-Book Activity

Number of Titles Accessed

2007 2008 2009 2010 2011

556 2995 6239 12227 7175

First 5 months of 2011

Working With E-Resource Metadata
PGPL: Growth in E-Resources

PGPL *OverDrive/Library To Go* Circulation Activity
Modifying records

- R2 report (Study of the North American MARC records marketplace, R2 Consulting)

“Cataloguers have an almost unstoppable urge to improve, tweak, customize and “localize” national-level records; redundant work is still widespread”

- Connie McGuire, Vicki Dillon (Univ. Michigan)

“Corrections [to records] are not made when the errors do not affect access”
Modifying records

- MarcEdit Software

- Integrated Library System
  - Make changes when loading via load tables
  - Make changes after loading via global change functionality
Modifying records

• What fields do you want to remove?
  ▫ 6XX subjects not indexed
  ▫ 9XX local notes?

• What fields do you want to insert?
  ▫ 001 control number
  ▫ 506 access restrictions?
  ▫ 050/082 classification number?
  ▫ 9XX local notes?

• What fields do you want to edit?
  ▫ 856 add proxy address? $z link display text?
Modifying records: PGPL

Working With E-Resource Metadata

- Select a Title Control Number matching rule.
- Select a platform below a option button for a detailed description of the rule.
- Refer to help for information on how the software matches incoming records with records in the system.

- When an incoming record matches an existing record with a date in the "date cataloged" field, it will not load. It will be reported as an error.

- Incoming records will be compared with records already in the system.
- When a record is new to the system, it will be created.
- When an incoming record matches a record already in the system with a "date cataloged" of NEVER, the existing record will be updated according to other specified settings.

- Process bibliographic delete status:
  - Handling MARC records that contain a "d" in the Leader/2410 will be:
    - Deleted
    - Listed
    - Ignored
    - Loaded

- General Information:
  - Update date cataloged:
  - Default record format:
  - Update title control information from title information entry:

- Bibliographic/Record Processing:
  - Update bibliographic record when updating records
  - Update publication year
  - Remove entries listed in the file "junktag"

- Call number and copy processing:
  - Holdings entry preprocessing: None
  - Copy processing:
    - Cell number load rules: LC:JPGH
    - Default holding code: DEFAULT
  - Update RFID-assigned call numbers
  - Create/update price from holdings statement, 021 subfield c
Modifying records: PGPL
Modifying records: PGPL
Modifying records: PGPL

Working With E-Resource Metadata
Modifying records: UNBC
Modifying records: UNBC
Evaluating records

- Quality issues: accuracy, completeness

- Compatibility issues: display of diacritics

- Access issues: Do the records add access value to the resources described?

- Workload issues: how much editing/updating will be required? How will it be accomplished and who will do it?
# Evaluating quality

<table>
<thead>
<tr>
<th>Title</th>
<th>Flannery O'Connor (9781429813037) [electronic resource]</th>
</tr>
</thead>
</table>

**Connect to**
- Online resource : MAS Ultra - School Edition
- Online resource : MasterFILE Premier
- Online resource : Middle Search Plus
- Online resource : Primary Search

**Details**
- **Note**: Title from content provider.
- **Access**: Access restricted to users at subscribing institutions.
- **Genre**: Electronic books.
- **Alt Author**: EBSCO Publishing (Firm)
- **ISBN**: 9781429813037, 1429813032
Evaluating access

<table>
<thead>
<tr>
<th>Author</th>
<th>Seigel, Micol.</th>
</tr>
</thead>
</table>

**Connect to**


**Details**

- **Note**: Title from content provider.
- **Access**: Access restricted to users at subscribing institutions.
- **Genre**: Electronic books.
- **ISBN**: 9780822392170, 0822392178
### Evaluating access

#### Working With E-Resource Metadata

<table>
<thead>
<tr>
<th>Author</th>
<th>Seigel, Micol, 1968-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Uneven encounters : making race and nation in Brazil and the United States / Micol Seigel.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>CALL #</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stacks</td>
<td>F265.S1 A1 S44 2009</td>
<td>IN LIBRARY</td>
</tr>
</tbody>
</table>

#### Details

- **Phys. Description**: xxii, 386 p. : ill. ; 24 cm.
- **Series**: American encounters/global interactions
- **Bibliogr.**: Includes bibliographical references (p. [323]-365) and index. Includes discography: p. [321].
- **Subject**
  - Racism -- Brazil -- History -- 20th century.
  - Nationalism -- Brazil -- History -- 20th century.
  - Brazil -- Race relations -- History -- 20th century.
  - Racism -- United States -- History -- 20th century.
  - Nationalism -- United States -- History -- 20th century.
  - United States -- Race relations -- History -- 20th century.
- **ISBN**: 9780822344261 (cloth : alk. paper)  
  0822344262 (cloth : alk. paper)  
  9780822344407 (pbk. : alk. paper)  
  0822344408 (pbk. : alk. paper)
Evaluating access

Author: Austen, Katherine.

Title: Book M [electronic resource] / Austen, Katherine.

Imprint: [S.l.] : [s.n.]

Rating

Click here to connect

Online resource: Defining Gender, 1450-1910

Details

Note: Title from content provider.

Access: Access restricted to users at subscribing institutions.

Genre: Electronic books.

Alt Author: British Library.

Adam Matthew Digital.

Adam Matthew Publications.
Evaluating access
Evaluating access

Author: Austen, Katherine, fl. 1659-1668.

Details

Note: Ms. journal kept by Katherine Austen from 1664-1668, containing passages of poetry and prose, prayers, comments on daily life, domestic and religious activities, and contemporary politics.
Note: British Library
Subject: Austen, Katherine, fl. 1659-1668.

Alt Author: British Library.
Adam Matthew Digital (Firm)
Evaluating access
Maintaining collections

• How to keep track of what’s been added and still outstanding?

• What about deletions?

• What about authority control?

• What about usage statistics?
## Maintaining collections

<table>
<thead>
<tr>
<th>Load Date</th>
<th>File Name</th>
<th>Monograph Records Loaded</th>
<th>Monograph Records Retained</th>
<th>Serial Records Loaded</th>
<th>Serial Records Retained</th>
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<tr>
<td>2011-05-30</td>
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</table>

Paul Burry: use "Leglib" load table. Insert: 245|h, 007 Delete: ".","", "&<20xx", ALL non "libc.leg.bc.ca" 856s, 59X
Maintaining collections

Working With E-Resource Metadata

Resource Name: Safari Tech Books Online
Alternate Resource Name: Safari Books Online
Description: Safari Books Online is the electronic reference library that delivers content from the world's leaders in technology publishing. Safari offers the combined collections from O'Reilly Media, John Wiley & Sons, Addison-Wesley, Peachpit Press, Apress Press, Lynda.com, and many other publishers in one database.
Subject: Library & Information Studies
Subject: Information Technology Management
Subject: Computer Science
Coverage: Current
Resource Format: HTML
Resource Type: E-book collection
ProQuest Safari Tech Books Online
Notes: Default record from Innovative Interfaces.
User Support: 1-800-689-3358 (SAS to midnight EST), tsupport@proquest.com [Dec. 05]

Name: Naomi Eichenlaub
Date: 20101201
Send to: neichen@ryerson.ca
Subject: Check for Safari new titles to load and annual deletions
Header:
Authority control
Authority control

<table>
<thead>
<tr>
<th>MARC Leader</th>
<th>y 001</th>
<th>0054L6437</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>y 003</td>
<td>CaOONL</td>
</tr>
<tr>
<td></td>
<td>y 005</td>
<td>19931118</td>
</tr>
<tr>
<td></td>
<td>y 008</td>
<td>860813n</td>
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<tr>
<td></td>
<td>y 016</td>
<td>0054L6437</td>
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<tr>
<td></td>
<td>y 040</td>
<td>CaOONL[b]eng[c]CaOONL[d]CaOONL</td>
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<tr>
<td>a</td>
<td>100 1</td>
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<tr>
<td>n</td>
<td>670</td>
<td>His Nietzsche and the problem of historicism. Date. Born in Canada</td>
</tr>
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<td>n</td>
<td>670</td>
<td>His Judicial statesmanship and the rule of law. Patrick Malcolmson. Also full name</td>
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Authority control

### New AUTHORITY - AUTHOR Authority (LCSH)

<table>
<thead>
<tr>
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<th>b 400 0</th>
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<th>n 670</th>
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<tbody>
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<td>y 003</td>
<td>DLC</td>
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<td>9603288n acannaab ja aaaa</td>
<td>o 010</td>
<td>n 96030585 jano2002052918</td>
<td>y 040</td>
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<tr>
<td>a 100 1</td>
<td>Malcolmson, Patrick</td>
<td>b 400 0</td>
<td>Malcolmson, Patrick N.</td>
<td>q(Patrick Neil)</td>
<td>n 670</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td>n 670</td>
<td>Amicus, June 25, 2004</td>
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Authority control

<table>
<thead>
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<th>Authority (LCSH)</th>
<th>MARC Leader</th>
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<td>y 008 960328n</td>
<td>o 010 n 96030585</td>
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<tr>
<td>y 016 0054L6437</td>
<td>y 040 DLC[?DLC][DLC][DLC][DaBPUB]</td>
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<tr>
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<td>a 400 0 Malcolmson, Patrick N. (Patrick Neil)</td>
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<tr>
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<td>n 670 His Nietzsche and the problem of historicism. Date: Born in Canada</td>
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</tr>
<tr>
<td>n 670 His Judicial statesmanship and the rule of law. Patrick Malcolmson. Also full name</td>
<td></td>
</tr>
</tbody>
</table>
Authority control
Tracking Usage Statistics

View OverDrive Download Station Usage Charts
View OverDrive Download Station activity.

View Purchased Title Report
View all titles owned and subscription-based content. View checkout and hold counts for each title. Limit results by type and date purchased. (Please be patient while this report loads).

View OverDrive Community Reserve Title Report
View details about OverDrive Community Reserve titles that have been accepted into your collection.

View OverDrive Community Reserve Title Sharing Report
View OverDrive Community Reserve titles from your local collection and which libraries have accepted them.

View Turnover Rate Charts
View turnover rates for your content.

View New Patron Registrations
View new patron registrations by the date each first logged into your library.

View Title Statistics
View statistics for top checkouts and waitlisted titles, formats, and subjects.

View Patron Activity Charts
View all patron download and borrowing activity.

View Current Waiting List
View titles currently on your patrons’ waiting lists.

View Waiting List History
View titles that have been on your patrons’ waiting lists.

Search Checkouts
Search for and view your patrons’ checkouts by checkout ID, library card number, or title.

View Digital Library Statistics
View statistics for your digital library including overall and current checkouts, holds, patrons, etc.

View Traffic Reports
View traffic reports from the past 22 calendar months.

View Patron Interest Reports
View patron interest reports from the past 22 calendar months.

View Page Request Reports
View page request reports from the past 22 calendar months.

View MARC Record Delivery Reports
View reports of all MARC record deliveries to date.

View Returned Content Report
Search for details about the returned content for your library.
## Tracking Usage Statistics

### Total E-Book Activity

<table>
<thead>
<tr>
<th>Month</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
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<tbody>
<tr>
<td>Jan</td>
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<td>6239</td>
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<td>7175</td>
</tr>
</tbody>
</table>
Tracking Usage Statistics

PGPL Database Activity by Session

Number of Sessions

2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010

0 5000 10000 15000 20000 25000
British Columbia Legislative Library records

• From: http://www.llbc.leg.bc.ca/marc_batch/index.htm

• “Libraries can currently import the Legislative Library’s MARC records individually using the Z39.50 protocol for importing bibliographic records.” (http://www.llbc.leg.bc.ca/z3950.htm)

• “The batch MARC records batch service expands this current record-by-record service, enabling libraries to import MARC records directly into their own integrated library systems. These records include permanent links to the publications stored in the Legislative Library’s electronic publications collection.”

• “The MARC records available for import are based on the current issues of the British Columbia Government Monthly Checklist found at the Legislative Library’s online catalogue site.”
British Columbia Legislative Library records

The collection contains publications such as:

- Annual reports
- Financial reports
- Budget material
- Commissions of inquiry reports
- Electoral district maps
- Newsletters
- Policy papers
- Public consultation documents
- Quarterly reports
- Research reports
- Task force reports
British Columbia Legislative Library records

- Separate monograph and serial files available for load monthly
- “The MARC records include only the records for publications which have electronic formats”
- The first listed 856 field points to the “Legislative Library’s permanent link” (begins: http://www.llbc.leg.bc.ca)
British Columbia Legislative Library records at UNBC

Corporation Author: First Peoples' Heritage, Language & Culture

Title: A proposal to amend the First Peoples' Heritage, Language and Culture Act: proposed amendments. -- Victoria, B.C.: First Peoples'<U+2122> [i.e., First Peoples'] [U+2122] [2009]

Details

Physical Description: 9 p.; 29 cm.

Note: At head of title: Discussion paper.
Running title: Legislative amendment proposal.
Catalogue record made available by the British Columbia Legislative Library.
Available on the Internet:
Printed from the Internet.

Subject: British Columbia. First Peoples' Heritage, Language and Culture Act
Native peoples -- British Columbia -- Languages
British Columbia -- Cultural policy.

All Title: Discussion paper: a proposal to amend the First Peoples' Heritage, Language and Culture Act.
Legislative amendment proposal

Click here to connect: http://www.fphlcc.ca/downloads/discussion-paper
British Columbia Legislative Library records at UNBC

Corp Author: First Peoples' Heritage, Language and Culture Council (B.C.)

Connect to the Online resource
British Columbia Legislative Library records at UNBC

- ISBD punctuation “. --”
- Unicode symbols “<U+”
- 090 call number
- 300 description
- 530 “Also available”
- 59x local notes

- 001 control number
- 003 system symbol
- 007 for remote electronic
- GMD into 245 $h
- Link display text into 856 $z
- 911 local field with ERM record number
British Columbia Legislative Library records BCCATS project

http://www.eln.bc.ca/view.php?id=1876
Looking to the future

- The Power of Collaboration
- BC Public Library E-Book Summit
- Patron Driven Acquisitions
- Provider-Neutral MARC Records
Provider-neutral MARC records

- Provider-neutral e-monograph record task group and cataloguing model
Provider-neutral MARC records
Recommended reading


Thanks very much!

PDF of slides: eprints.rclis.org
“working with e-resource metadata”
Paul Burry
pburry@lib.pg.bc.ca

With thanks to:

Naomi Eichenlaub
neichenl@ryerson.ca