WILEY

Webinar Series

Dressing for Library Success with Electronic Resources 13 May | SGT 9AM



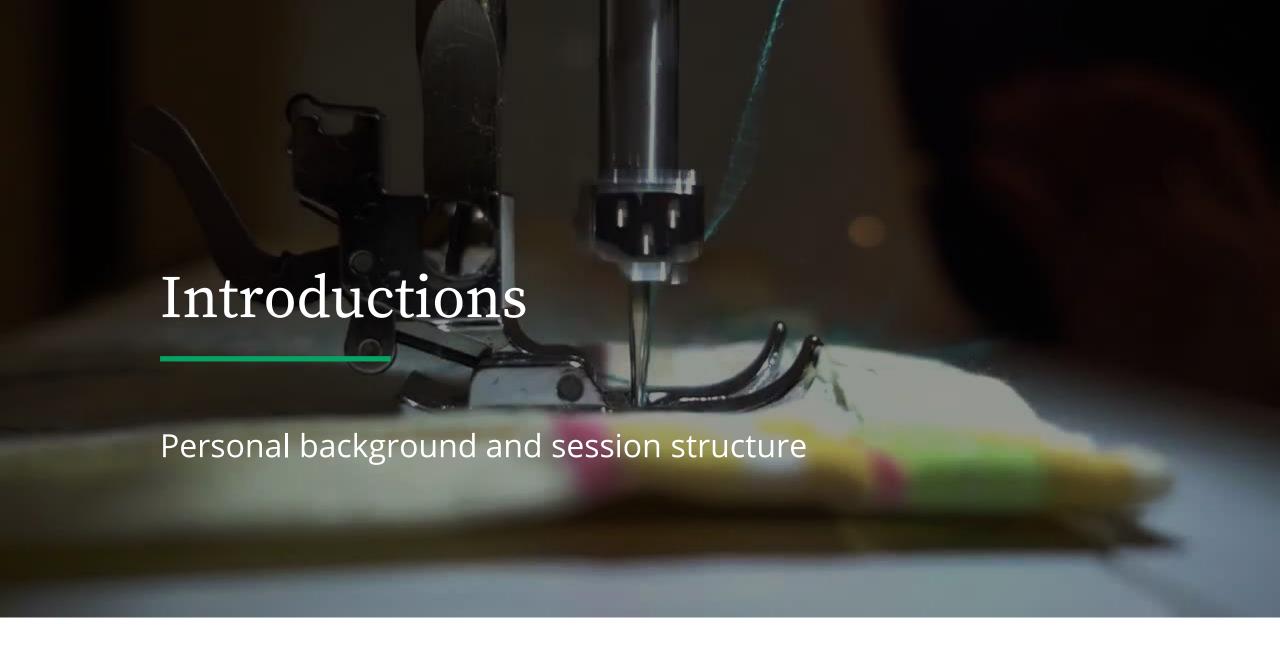
Matthew Ragucci
Associate Director, B2B Product Marketing,
Wiley





# Matthew Ragucci, MLIS

Associate Director, Library Solutions



# Personal Background

#### **Education**

- Bachelor of Arts History, Spanish (Marist College, 2007)
- Master of Library and Information Science (Rutgers University, 2010)



### **Internships**

- Fair Haven Public Library
- Franklin D. Roosevelt Presidential Museum & Archives

#### **Professional roles**

- Various roles at public libraries in Circulation, Reference and Management departments
- Reference & Instruction Librarian / Technical Services Manager at Brookdale Community College

#### **Publications**

- MARC Metamorphosis: Transforming the Way You Look at E-Book Records (2019)
- Evidence-Based Acquisition: A Real Life Account of Managing the Program (2017)



### Session Structure

### **Defining the work**

- Why we fight
- E-resource lifecycle
- Technical services definitions

### How Librarians work to...

- Promote Discovery
- Improve Access
- Troubleshoot Issues

### **Content provider roles**

- Metadata Provisions
- Discovery Feeds
- Working with vendors

### Closing

- Reemphasizing implications
- Resources
- Questions



### Disclaimers

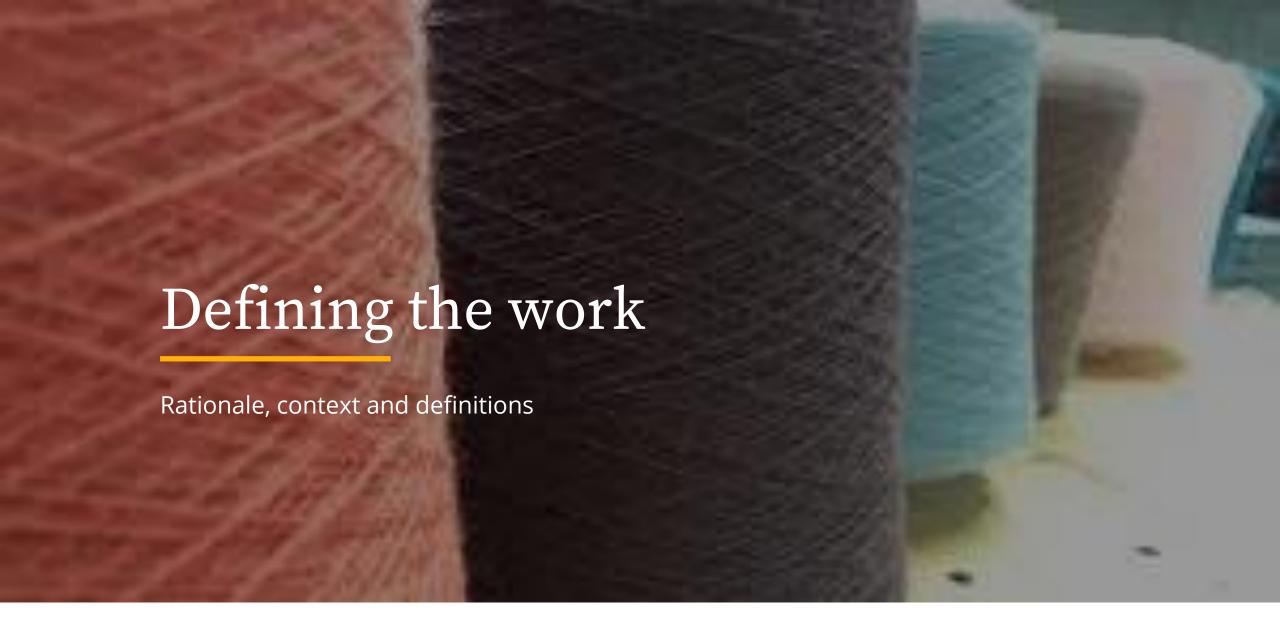


Different workflows









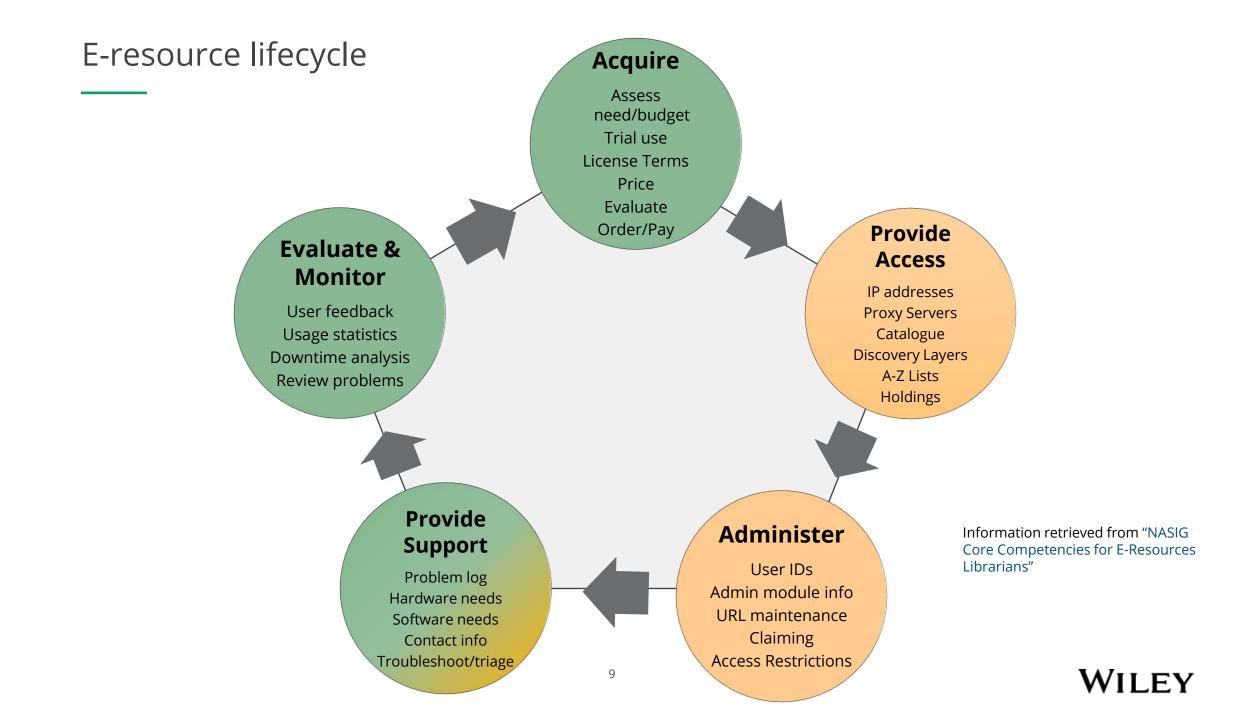
# Why we fight

**Discovery** and **Access** contribute to content **Usage**.

<u>Usage</u> is a key metric in determining content <u>Value</u>.

**Value** is realized by **Libraries** and **Content Providers**.





### Technical services definitions



Content Provider



Vendor



Journal A-Z Lists



MARC Records



Institutional Repositories



**Discovery Layers** 



Knowledgebases



**KBART** files



Link Resolvers



**Proxy Servers** 

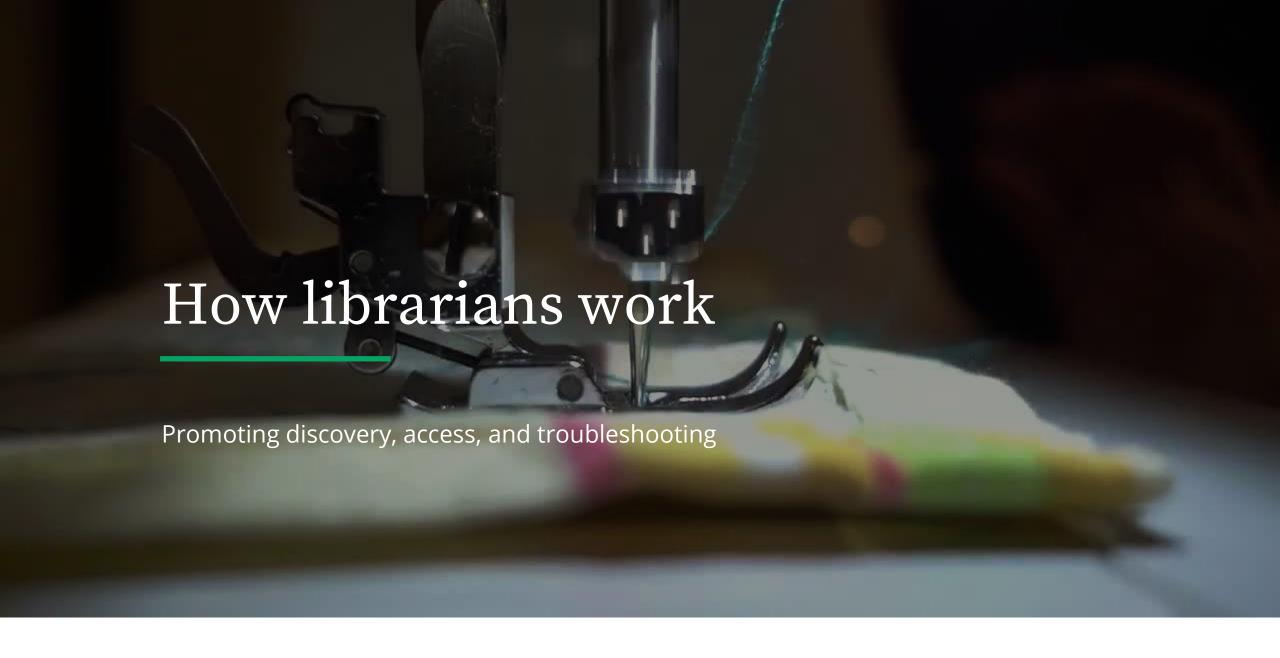


LibGuides

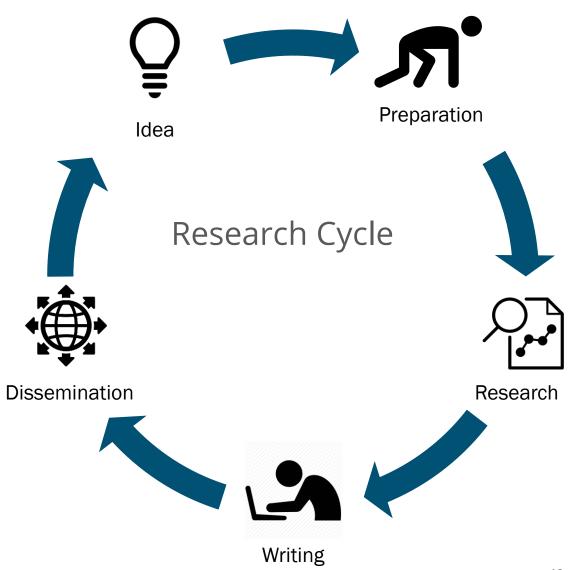


**COUNTER/SUSHI** 





# Discovery in the Research Landscape

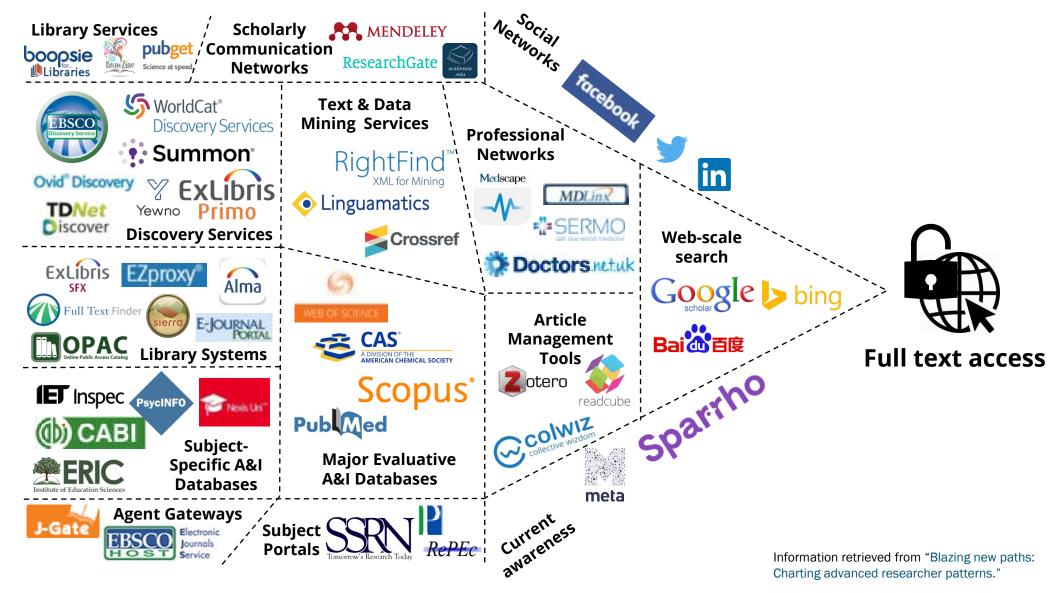


"Libraries currently support preparation and dissemination phases of the research cycle most heavily."

Retrieved from "Beyond the index: research and discovery services in a health sciences library."



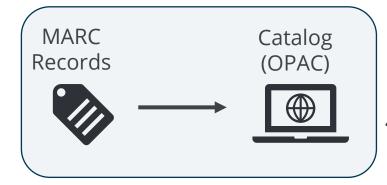
# Discovery pathways

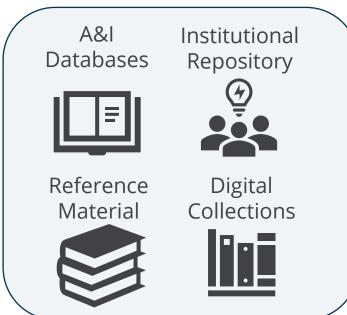






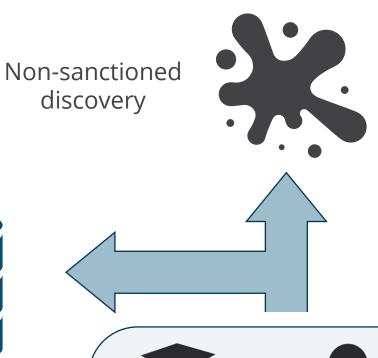
# Discovery Workflows







Library Discovery Layer







### MARC Records

- Discovery through Description
- Serials and monographs
- Preferred data elements
- Not all records are equal
- AACR2 > RDA
- Use MARCEdit, it's free!

001 019 020 024 035	Unique Identifier ISSN ISBN DOI OCN	245 250	Title Publication info	072 65X	BISAC SHs LC SHs MeSHs
040	Cataloging sources	300 33X	Physical Descriptio n RDA	776	Additional Physical Form
050 082	LC Classification Number Dewey Decimal Classification Number	490 830	Series statements	856	Linking: -Content -TOC -Cover image
100	Author	505 520	Table of contents Book summary	9XX	Local Cataloging Data



### MARC Metadata

#### =LDR 05156cam 2200745La 4500 =001 ocm47008401\ =003 OCoLC =005 20160112044651.1 Unique =006 m\\\\\o\\u\\\\\\\ =007 cr\cn|||||| identifiers =008 010306s1999\\\mau\\\\ob\\\\001\0\eng\d =020 \\\$a0631227490\$q(electronic bk.) =020 \\\$a9780631227496\$q(electronic bk.) =020 \\\$a0470998385\$g(electronic bk.) =020 \\\$a9780470998380\$q(electronic bk.) =020 \\\$a9781405164504 =020 \\\$z0631201300\$q(Cloth) =024 7\\$a10.1002/9780470998397\$2doi =035 \\\$a(OCoLC)47008401\$z(OCoLC)184983715\$z(OCoLC)241071383\$z(OCoLC)2441751 =037 \\\$a9780631201304\$bBlackwell\$nhttp://www.blackwellreference.com =050 \4\$aHF5387\$b.C655 1999eb **Call Numbers** =072 \7\$aBUS\$x008000\$2bisacsh =082 04\$a174/.4\$221 =084 \\\$aB82-053\$2clc **Publisher** Title =084 \\\$aF718\$2clc info =084 \\\$aB822. 9\$2clc =049 \\\$aMAIN =245 02\$aA companion to business ethics/\$cedited by Robert E. Frederick. =260 \\\$aMalden, Mass.:\$bBlackwell Publishers,\$c1999. =300 \\\$a1 online resource (xvi, 464 pages). **Physical Description** =336 \\\\$atext\\$btxt\\$2rdacontent =337 \\\$acomputer\$bc\$2rdamedia =338 \\\$aonline resource\$bcr\$2rdacarrier Series =490 1\\$aBlackwell companions to philosophy;\$v17 =504 \\\$aIncludes bibliographical references and index.

#### **Table of Contents**



=505 00\$tBusiness Ethics and Normative Theories --\$tA Kantian approach to business ethics /\$rNorman E. Bowie --\$tUtilitarianism and business ethics /\$rMilton Snoeyenbos, James Humber --\$tBusiness ethics and virtue /\$rRobert C. Solomon --\$tSocial contract approaches to business ethics: bridging the "is-ought" gap /\$rThomas W. Dunfee, Thomas Donaldson --\$tBusiness ethics and the pragmatic attitude /\$rDouglas R. Anderson --\$tAn outline of ethical relativism and ethical absolutism /\$rRobert E. Frederick --\$tFeminist theory and business ethics /\$rRobbin Derry --\$tBusiness ethics in a free society /\$rTibor R. Machan --\$tNature and business ethics /\$rWilliam C. Frederick --\$tToward new directions in business ethics: some pragmatic pathways /\$rSandra B. Rosenthal, Rogene A. Buchholz -- \$tBusiness ethics: pragmatism and postmodernism /\$rR. Edward Freeman. Robert A. Phillips --\$tBusiness Ethics and the Business Disciplines --\$tEthics in management /\$rArchie B. Carroll --\$tFinance ethics /\$rJohn R. Boatright --\$tEthics in the public accounting profession /\$rMohammad I. Abdolmohammadi, Mark R. Nixon -- \$tMarketing ethics / \$rGeorge G. Brenkert -- \$tLaw, ethics, and managerial judgment /\$rLynn S. Paine --\$tBusiness ethics and economics /\$rDiane L. Swanson --\$tBusiness ethics and the social sciences /\$rLinda Klebe Trevino --\$tlssues in Business Ethics --\$tInternational business ethics /\$rRichard T. de George --\$tCorporate moral agency /\$r|ohn R. Danley --\$tEmployee rights /\$rRonald Duska --\$tBusiness ethics and work: questions for the twenty-first century /\$rJoanne B. Ciulla.

=520 1\\$a"In a series of articles specifically commissioned for this volume, business ethicists survey the main areas of interest and concern in the field of business ethics."--BOOK JACKET. "The book can be used as a comprehensive text for introductory or advanced courses in business ethics, as a reference for teachers and writers in the field, or as a guide for other academic or business persons who wish to become familiar with the central issues in the field. To enhance its usefulness as a reference work, the volume includes bibliographies of the relevant literature, a list of internet sources for material on business ethics, and an extensive index."--Jacket

=588 0\\$aPrint version record.

=590 \\\$aWiley\$bWiley Online Library E-Books

Subject Headings

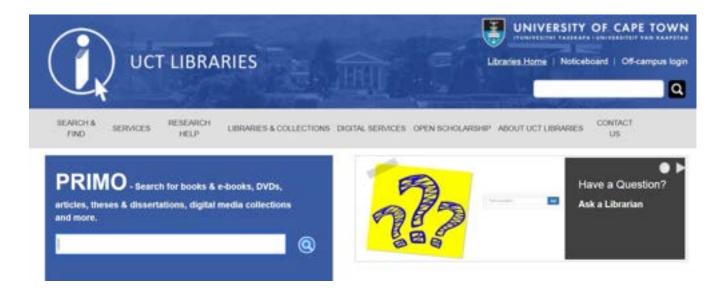
Abstract

- =650 \0\$aBusiness ethics.
- =655 \4\$aElectronic books.
- =700 1\\$aFrederick, Robert.
- =776 08\$iPrint version:\$tCompanion to business ethics.\$dMalden, Mass.: Blackwell
- Publishers, 1999\$z0631201300\$w(DLC) 99019775\$w(OCoLC)40777040
- =830 \0\$aBlackwell companions to philosophy;\$v17.
- =856 40\$uhttp://onlinelibrary.wiley.com/back/10.1002/9780470998397\$zWiley Online =994 \\\$a92\$bDG1



### Discovery Layers

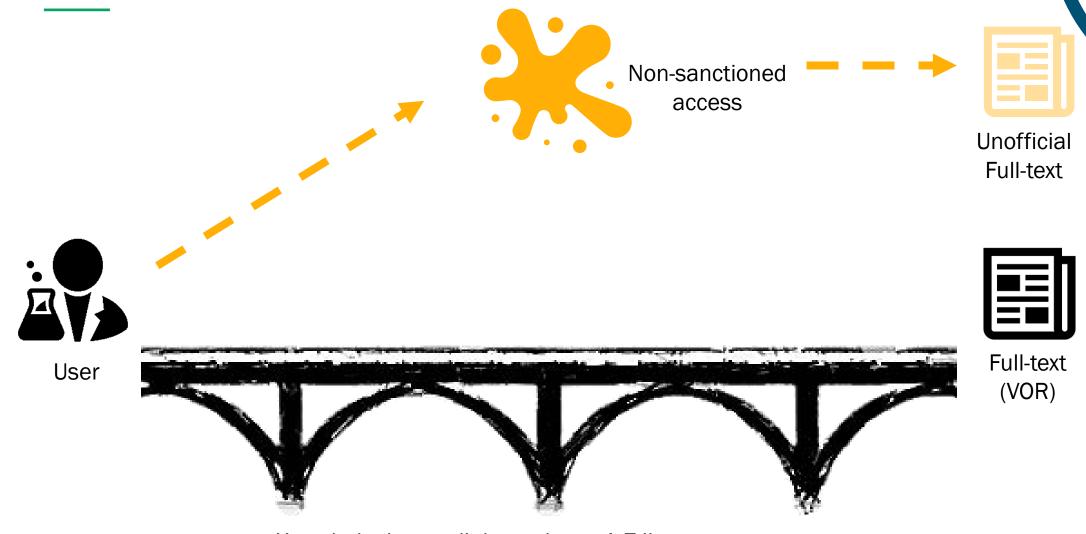
- Allows user to discover library content sources through a single search
- Chapter/article metadata comes from vendor index
- Requires institutional-level configuration (content providers and branding)
- Ranking algorithm for relevant and subscribed content
- Symbiotic relationship with KBART and link resolvers



Library Solutions Vendor	Discover Layer Product
ProQuest	Summon
Ex Libris	Primo Central
OCLC	WorldCat Discovery
EBSCO	EDS/ OLE Kuali*
Innovative	Encore
SirsiDynix	Enterprise



# Access: A bridge too far



Knowledgebases, link resolvers, A-Z lists, proxy servers, federated access, LibGuides and consortia resources



# Building bridges for our users

Create and maintain as many sanctioned portals as possible...

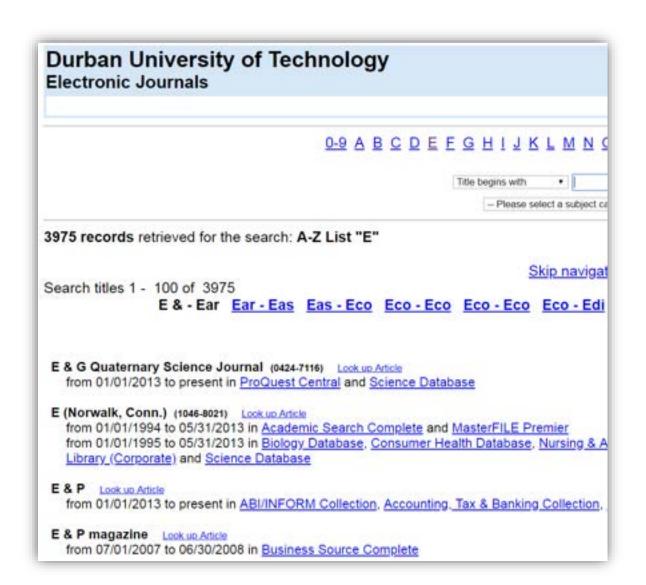
...by using all the tools at our disposal...

...that drive to licensed, trackable content



### Journal A-Z Lists

- Sometimes called journal portals
- Can also be utilized for databases
- Alphabetical index of available titles
- Indicate date range coverage
- Different dates, different DBs
- Require configuration through knowledgebases
- Should be audited to ensure continuous access or to remove titles

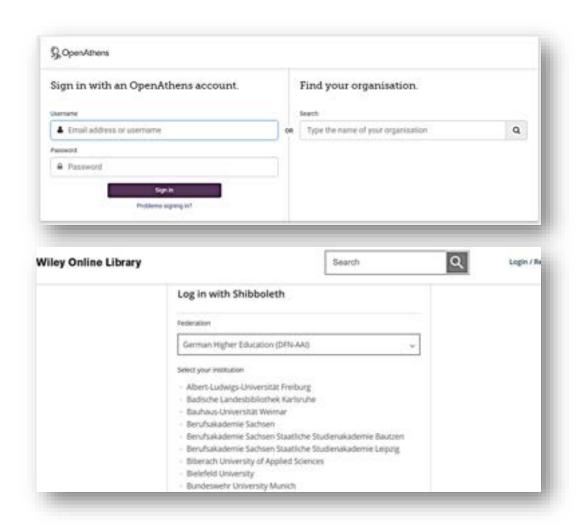




### Federated Access

#### **Fast Facts:**

- Aka Shibboleth, OpenAthens, or SAML 2.0
- SAML-based authentication (doesn't require an IP)
- Federation membership is required
- Supported by most major publishers
- The next generation of access and authentication to licensed content supporting initiatives like RA21 and Seamless Access

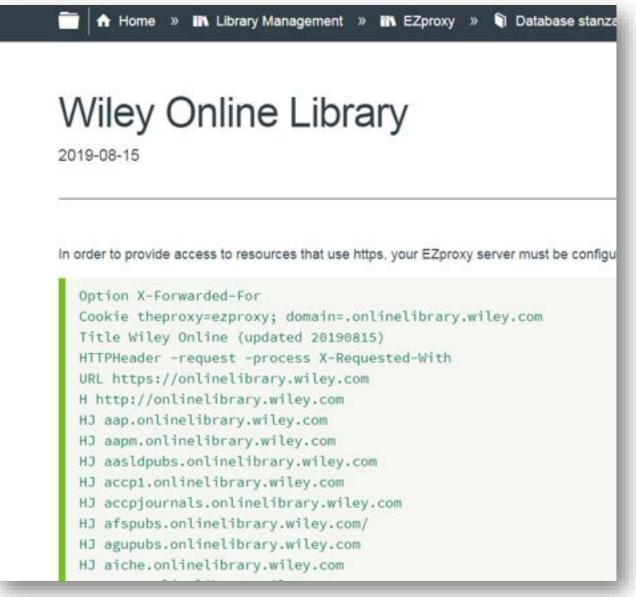


RA21 FAQ https://ra21.org/what-is-ra21/faq/



# **Proxy Servers**

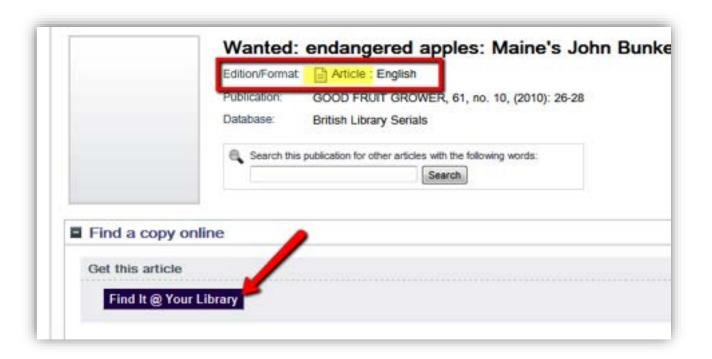
- Maintain institutional configuration stanza; a whitelist of appropriate targets
- Major products: EZproxy (OCLC), WAM (III) and TDproxy ((TDNet)
- Vendor-neutral solution that connects to many content providers
- Require maintenance and testing
- Append to all resources links (MARC records, discovery layers or A-Z lists)
- Clear IPs with content providers





### Link Resolvers

- Source to target connection
- Providers citation chasers with easy access
- Unavailable content gets channeled to ILL requests
- Work with publishers for base URLs and rebranding
- Require configuration through the vendor knowledgebase

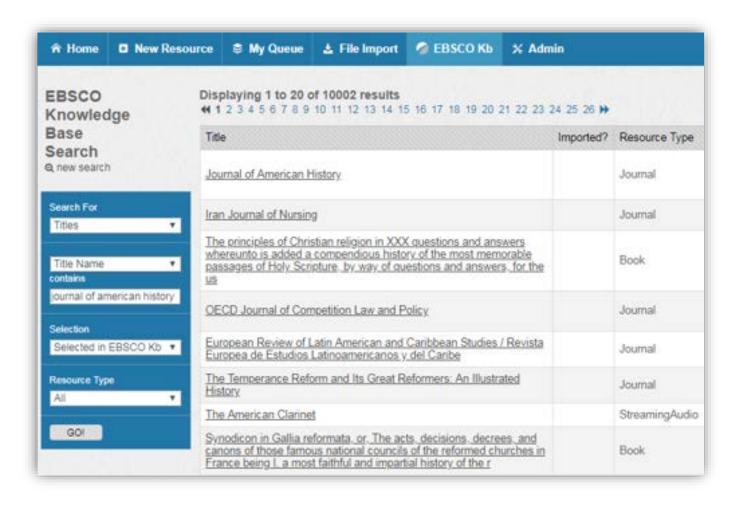


Library Solutions Vendor	Link Resolver Product
ProQuest	360 Link
Ex Libris	SFX
OCLC	Link Resolver
EBSCO	LinkSource
Innovative	WebBridge



# Knowledgebases

- Required for many products:
  - ✓ Link resolvers
  - ✓ A-Z Lists
  - ✓ Discovery Layers
  - ✓ MARC records
- Vendor feed from content providers
- Collections map to content packages (not specific subscriptions)
- Collections can be created to reflect institution-specific holdings
- Must be constantly monitored





### **KBART**

#### **Fast Facts:**

- KnowledgeBase And Related Tools
- Recommended practice created in 2007 to ensure the timely transfer of accurate data to knowledgebases vendors and link resolver providers
- Data sources for knowledgebases
- Created by content providers & libraries
- Has evolved overtime to meet emerging needs of libraries (books, OA, consortia)
- Files subject to updates (data corrections, link updates, new publications, transfer/withdrawn titles)
- Require frequent updates

#### **KBART Phase II Data Fields**

publication title

print identifier

online identifier

date first issue online

number first vol online

number first issue online

date last issue online

number last vol online

number last issue online

10. title URL

11. first author

12. title id

13. embargo info

14. coverage depth

15. notes

16. publisher name

17. publication type

18. date monograph published print

19. date monograph published online

20. monograph volume

21. monograph edition

22. first editor

23. parent publication title id

24. preceding publication title id

25. access type



# KBART file for serials content

					num_first	date_last		num_last
			date_first_issue_	num_first_vol	_issue_	_issue_	num_last_	_issue_
publication_title	print_identifier	online_identifier	online	_online	online	online	vol_online	online
Academic Emergency Medicine	1069-6563	1553-2712	1997	4	1			
ACR Open Rheumatology		2578-5745	2019	1	1			
Acta Ophthalmologica	1755-375X	1755-3768	2008	86	1			
Acta Ophthalmologica Scandinavica	1395-3907	1600-0420	1997	75	1	2007	85	8

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https://onlinelibrary.wiley.com/loi/25785745		10.1002/(ISSN)2578-5745		fulltext	Open Access Title	Wiley	Serial
https://onlinelibrary.wiley.com/loi/17553768		10.1111/(ISSN)1755-3768	P1Y	fulltext	Content older than 1 year back	Wiley	Serial
https://onlinelibrary.wiley.com/loi/16000420		10.1111/(ISSN)1600-0420	P1Y	fulltext	Content older than 1 year back	Wiley	Serial

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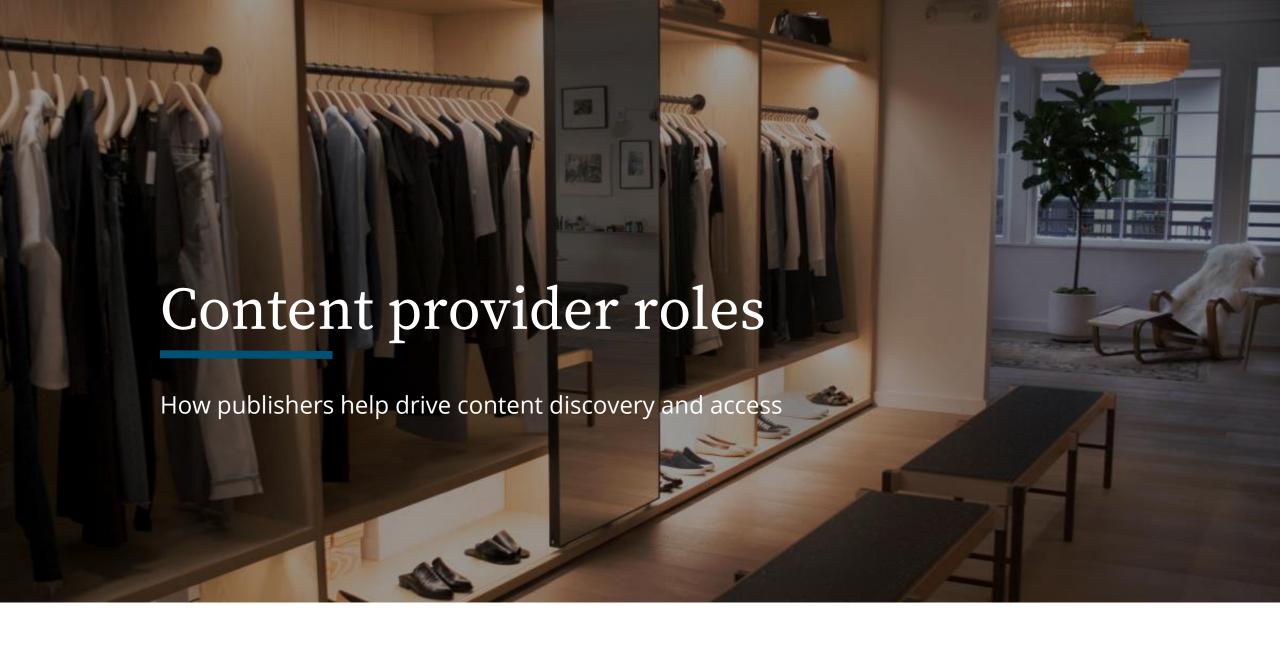
# Troubleshooting E-Resource Issues

- Determine as much as you can prior to contact an external party
- Try to be as descriptive as possible (include screengrabs or videos)
- Be persistent and make sure the issue is fully resolved
- Don't not be afraid to escalate (sales reps or supervisors)
- Track issues in system (instead of just answer emails and calls)
- Learn from problems work into purchasing decision and ask prospective vendors

# **Essential Skills and Knowledge for Troubleshooting Access Problems**

- 1. Overview of discovery and access environment
- 2. Common points of failure
- 3. Authentication and authorization
- 4. OpenURL and link resolvers
- 5. Differences and similarities between access for OA/free resource and license/paid resources
- 6. Discovery index content, activations and linking mechanisms
- 7. Metadata resources, quality, and impact on access
- 8. Detailed interaction between link resolver, discovery index, discovery layer, and LMS
- 9. Distinguishing isolated issues from widespread problems
- 10. Effective communication with system vendors and content providers







# Content provider responsibility for metadata





Link Resolver setup





Information on Proxy Stanzas

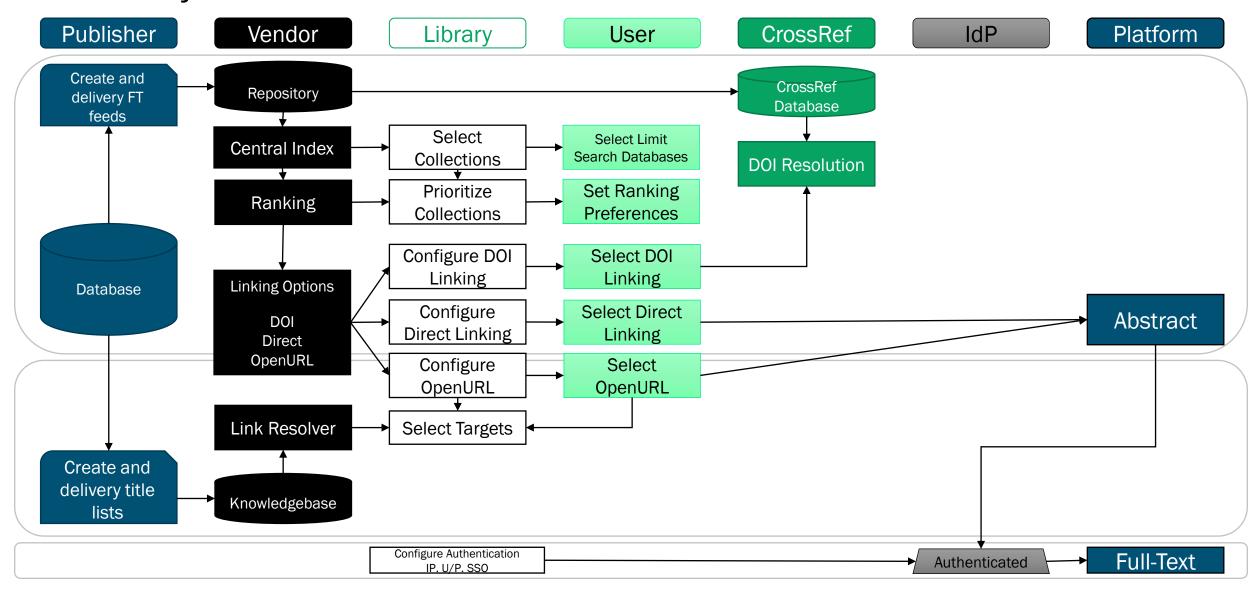




Data to Discovery Layers

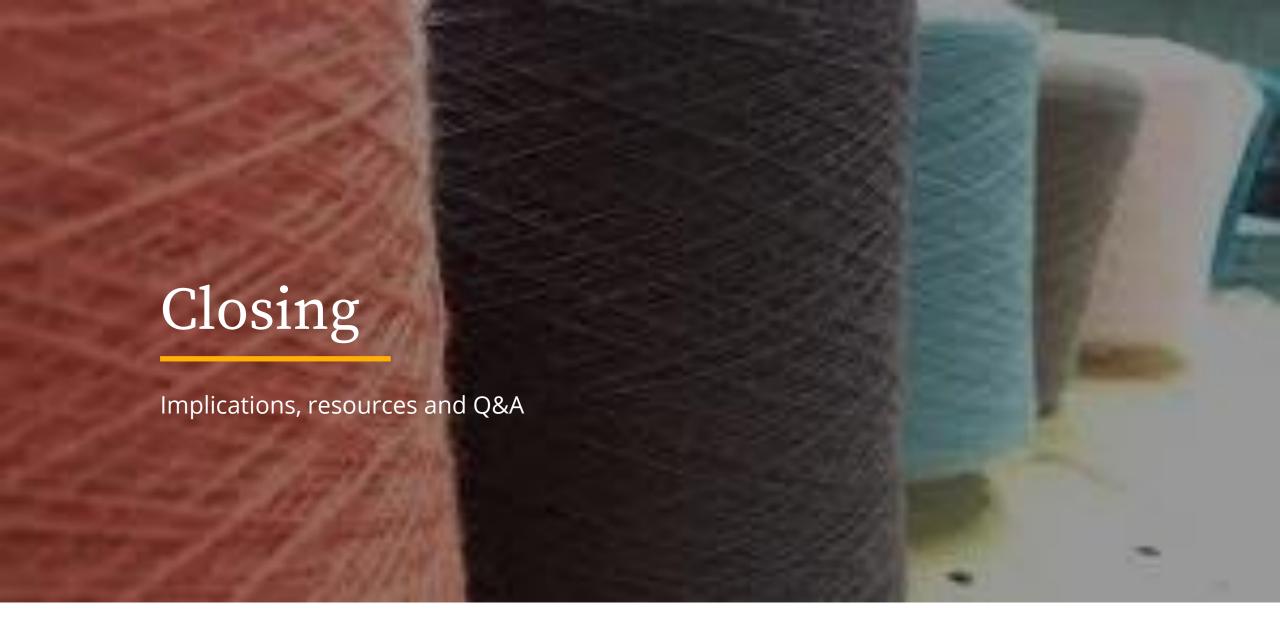


## **Discovery Dataflows**



# Content provider roles for troubleshooting

- Determining the real problem is half the battle (broken access has many causes)
- Blame game or apathy from content providers or vendors
- Support teams do have service level agreements to resolve cases
- Escalation tracks exist, where more experienced staff or product specialists get involved
- Opportunity to improve products and services



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# Better Metadata Could Help Save The World!

By ALICE MEADOWS | JUN 11, 2019 | 5 COMMENTS

DATA PUBLISHING | METRICS AND ANALYTICS | RESEARCH | TECHNOLOGY | TOOLS



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The title of this post may seem like a farfetched claim, however, no one can deny that we are currently faced with increasingly critical challenges - climate crisis, shrinking biodiversity, hunger, poverty, disease, and more. I think most of us would agree this means it's essential for the research findings that could help address these challenges to be shared as quickly and widely as possible - and for the data behind those findings to be FAIR (findable, accessible, interoperable, and reusable). And that means, metadata!





# Vendor product alignment table

Library Solutions Provider	Discover Layer	Link Resolver	A-Z List	Proxy	MARC Records	Integrated Library System	Library Service Platform
ProQuest	Summon	360 Link	E-Journal Portal		360MARC		Intota
Ex Libris	Primo	SFX	Primo A-Z List		Community Zone	Voyager, Aleph	Alma
OCLC	WorldCat Discovery	Link Resolver	AZ Link	EZproxy	WorldCat	WorldS	Share
EBSCO	EDS	LinkSource	E-Journals Database				
Innovative	Encore	WebBridge		WAM III	SkyRiver	Millennium, Polaris	Sierra
SirsiDynix	Enterprise					Symphony, Horizon	BLUEcloud
Open Source	VUFind, Blacklight					Koha, Evergreen, Librakia	OLE Kuali*

<sup>\*</sup> Funded by EBSCO



# Webliography

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