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360 MARC Updates

Introduction to 360 MARC Updates

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Agenda

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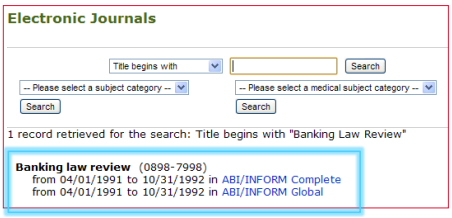
- 360 MARC Updates Overview
- Customization Options for Records
- Updating Your MARC Records

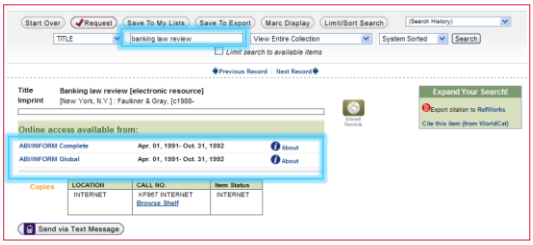
Patron Experience: Browsing Library's A – Z List

"Banking Law Review" in the E-Journal Portal



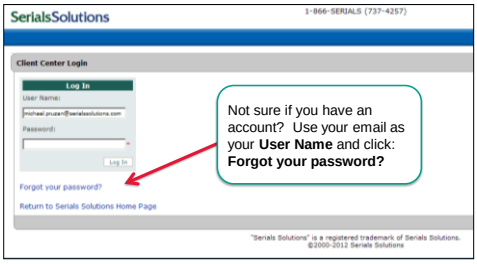
Patron Experience: Searching the Catalog

"Banking Law Review" in the catalog



How does 360 MARC know about your eResources?

- It's all in your Client Center profile: http://clientcenter.serialssolutions.com
- You need an account to log in.



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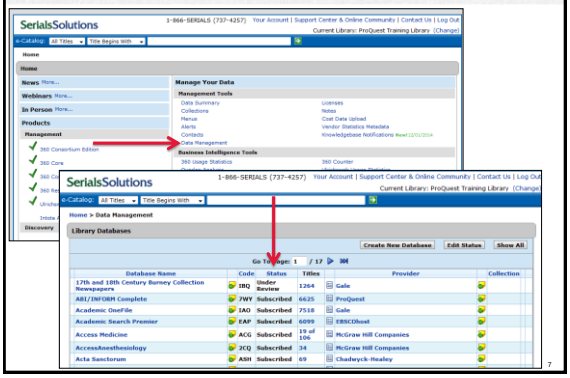
Client Center >>> Data Management



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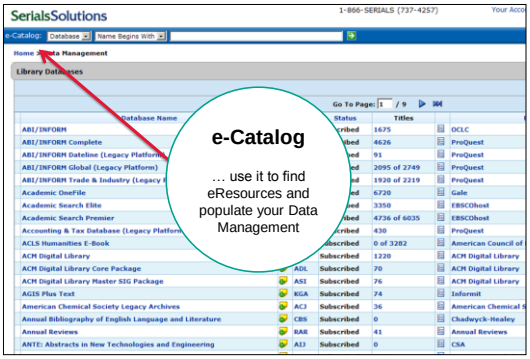
e-Catalog



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e-Catalog: powered by rich, authoritative metadata

- ProQuest Knowledgebase e-resource metadata:
  - Data about full-text e-journals and e-books
  - Managed by our metadata librarians
  - E-journal/E-book holdings reconciled to Authoritative Titles
  - Authoritative Title records based on one or more MARC records
- 360 MARC Updates utilizes:
  - Authority MARC records informing the Knowledgebase
  - The holdings information your library maintains in your Data Management profile

360 MARC Updates

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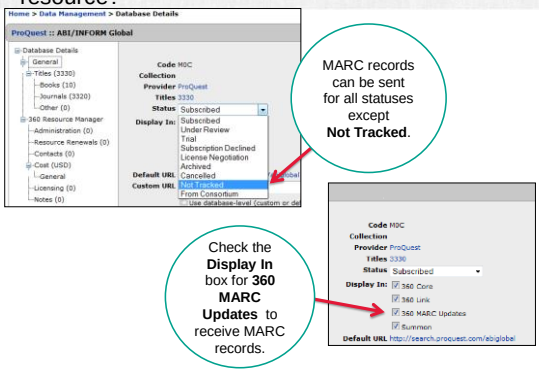
Want to receive MARC records for a resource?



Sources of MARC records

- CONSER: Cooperative Online Serials Program of the PCC (Program for Cooperative Cataloging) overseen by Library of Congress)
- NLM: National Library of Medicine
- Serials Solutions (original and brief records)
- Bowker
- Vendors (Ebrary, Project Muse, Springer, and others)

Did you know that 360 MARC Updates are available for monographs as well as serials?

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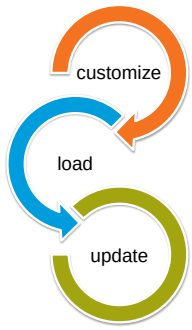
360 MARC Updates Service: Process



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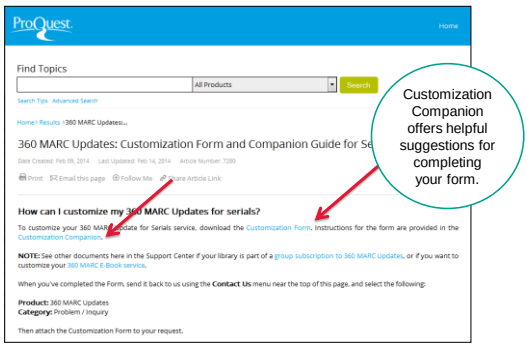
- Customization Options for Records
- Updating Your MARC Records

Customization Form and Companion Guide



Prioritize Your Record Sources

Record Type	Priority
Priority for CONSER online records	1
Priority for CONSER "neutral" records (These records do not explicitly state that they are for a specific record format, though they generally describe the print format.)	2
Priority for CONSER Print records	3
Priority for CONSER microform records	4
Priority for CONSER CD-ROM records	5
Priority for National Library of Medicine Records	6
Priority for Serials Solutions original records (These records are created by catalogers at Serials Solutions or for Serials Solutions.)	7
Priority for vendor-generated records (Records supplied by a vendor, e.g., Adam Matthew, Informit. For current list of available vendor records, see Support Center answer 360 MARC Updates: Vendor Record Information)	8
Priority for Serials Solutions supplemental brief records (Machine-generated brief records)	Last

Customize Your Records

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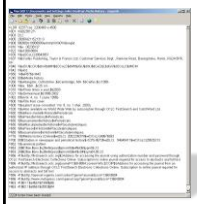
CONSER Record



- Add Fields: (9xx, 5xx, etc.)
- Remove Fields: (533, 773, 852, etc.)
- Customize 710s: (database/provider name)
- Customize 856 field(s): (single hosted URL or multiple direct URLs)
- Add 910 field: (record type information)
- Maintain 035 field: (OCLC numbers)

Custom Record

Record Customization Form

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Field	Possible Actions	Requested Action
LDR_06 (Leader)	Change to '**a**' for "Language Material" or other value	☒ a ☐ other Enter one-character alphabetic code
001 (Control Number)	*Innovative clients:* Add "**OCM1**" before the unique identifier'	☐ Yes ☒ No
006 (Additional Material Characteristics)	Create or replace 006 with coding "**m**\\\\o\d\\\\\\\\\\\\" '**m**' for Compute… 'o' for Online; 'd…	☐ Yes ☒ No
007 (Physical Description Fixed Field)	Create or replac… "**cr**\\n\\\\\\\\\\\" 'c' for Electroni… '**r**' for Not a… other phrase	
710 2# (Added Entry – Corporate Name)	Add database name or provider name as it appears in the Client Center *For hosted 856 clients, saying yes may greatly increase your number of changes.*	☐ Yes ☒ No ☐ Provider name OR ☐ Database name
856 40 (Electronic Location and Access)	Delete existing 856s. Replace with library-specific URLs	**PLEASE SELECT 856 STYLE AND FORMAT ON THE NEXT PAGE.**
949 (Local Holdings Information)	Add library-specific holdings notes information, as appropriate for your system	**Enter text of field here (please label subfields)**

Fields to add	Please enter field number, indicators, subfields and text here.
Fields to delete	Please enter field number and text here (specify subfields if necessary).
Other changes	Please specify.

Choose Your RDA Customizations

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RDA RESOURCE DESCRIPTION & ACCESS

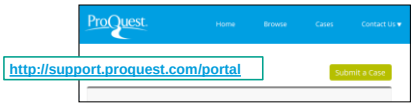
AACR2

- **Option 1. Customize RDA records to look like AACR2 records**
- **Option 2. Deliver mix of AACR2 and RDA records**
- **Option 3. Customize AACR2 records to look like RDA records.**
- **Option 4. Specify your own RDA-related customizations**

See the MARC Updates Customization Form for detailed information about the above options.

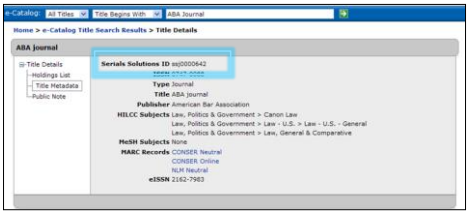
Sample Records

- Existing 360 MARC library requesting a change or two?
  - Use the Support Center's **Submit a Case** area to tell us about your changes or corrections.
- New 360 MARC library (or have many changes)?
  - Use the **Customization Form.**
- We can send you sample records reflecting your request:
  - You can load sample records into a test instance of your OPAC.
  - Send us back and corrections you find.
  - We will send you updated sample records.
  - Once you approve, we will send you a full set and schedule your monthly updates.

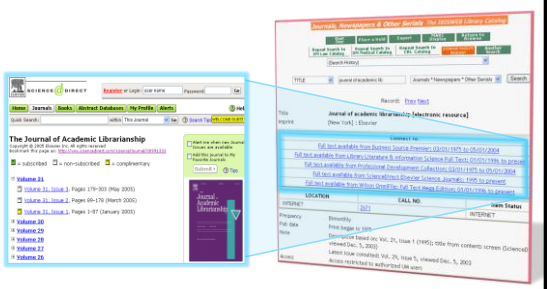


Organization Code and Unique Identifier

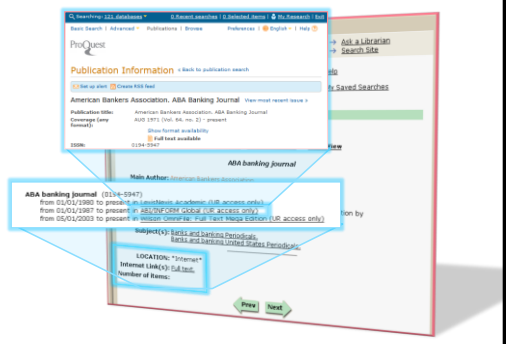
- Organization code:
  - **dWaSeSS** added to the 040 field by default
- Unique identifier:
  - Added to the 001 and 035 fields by default
  - Match point for overlaying records



MARC Record with Direct 856 Links Option

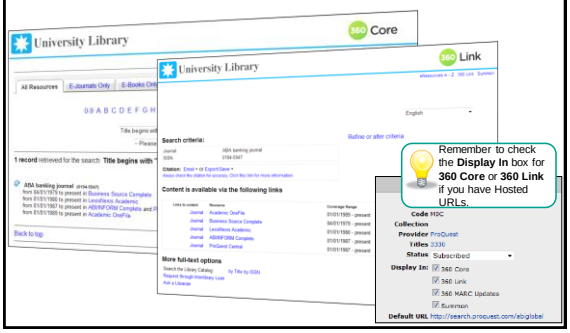


MARC Record with Hosted 856 Option



MARC Records: Hosted 856 Option

E-Journal Portal or 360 Link Results Page



Hosted vs. Direct Linking

Direct Link 856 Fields	Hosted 856 Field
User clicks once to get to content. 1. Catalog → Content	User must click twice to get content: 1. Catalog → 360 Link or E-Journal Portal 2. 360 Link or E-Journal Portal → Content
Holdings and links are not updated until monthly update is received and loaded.	Links updated daily to reflect provider and Data Management changes.
More change records to load each month.	Fewer change records to load each month.
No click-through statistics available.	Click-through statistics gathered in the Client Center.

Highlight = Advantage

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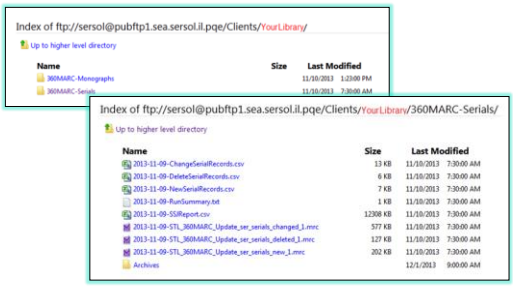
Retrieve your Files

- Files delivered to your folder on our ftp server



Update Options

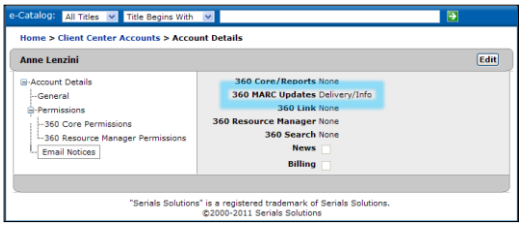
- Receive **Change**, **New**, and **Delete** records each month

  - or -

- Receive **Complete Set** of MARC Records each month
  - Note: with this option, you must remove all **360 MARC Update** records from your catalog every month before reloading.

- Special requests welcome:
  - You can request a cumulative update at any time (to make up for missed updates).
  - You can request an update or full set of records outside of your monthly schedule if needed.

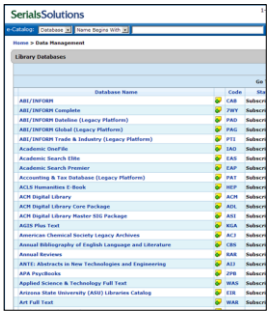
Accounts: Email Notices



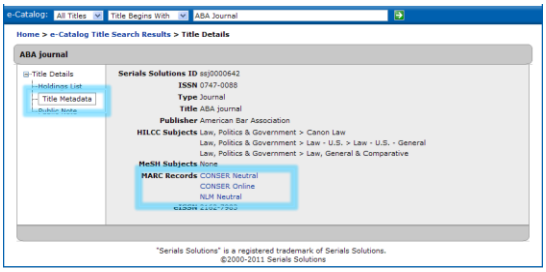
If you're not receiving your notices, let us know via the **Submit a Case** area of the Support Center. Sometimes we need to reset your information.

Updating your holdings in Data Management

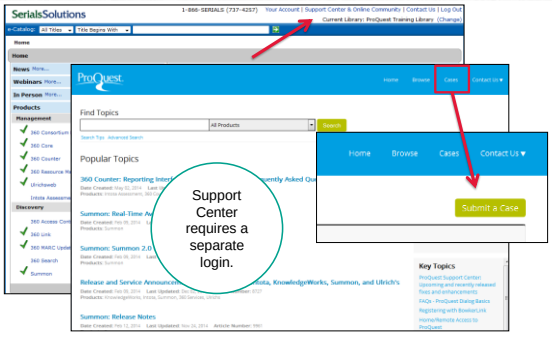
- Make Data Management changes by the 5th of the month.
- Record preparation begins on the 6th of the month.
- 6th to the 15th: 360 MARC sends out files.



Viewing MARC Records in the Client Center



Support Center



http://support.proquest.com/portal

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THANK YOU

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