We've Got Issues!

Conducting a Periodicals Inventory from A to Z

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Overview

- The Project: Rationale and scope
- The Setup: Cataloging report, spreadsheet creation, and student training
- The Inventory: Problems encountered, spreadsheet revisions
- The Updates: Cataloging follow-up
- The Lessons: What we would have done differently
- Next Steps
The Project
Project Rationale

- Periodicals weeding was long overdue
- No longer receiving physical issues
- Space!
Project Scope

- Originally multi-year project divided into phases
- Phase One: Analytics training & report creation (Fall 2022)
- Phase Two: Inventory of the physical periodical collection
  - Completion date set for Spring 2023
Project Scope

• Phase Three: Comparison of physical and electronic holdings
  • Bonus Phase: Inventory of electronic holdings to clean up records
  • Projected date of completion January 2024
• Phase Four: Liaison review of print holdings (Fall 2024)
The Setup
Alma Analytics: Original Inventory Report

Subject area: Physical Items

- Bibliographic Details folder
  - OCLC Control Number (035a)
  - Title (Complete) (245 $a,b,c,p,n, et al.)
  - Author (1xx)
  - Author (contributor) (7xx)
  - Uniform Title (130, 240)
  - ISSN (022 $l,a)

- Holding Details folder
  - Summary Holdings (866 $a)
  - Local param fields that map to 867/868

- Filters
  - Suppressed From Discovery = No
  - Lifecycle = Active
  - Location Name = Periodicals, Periodicals-Microfilm, Reference-Indexes
Spreadsheet Creation

• We had a lot of fields but no organization or filtering
• Spreadsheet evolved as the inventory progressed
Alma Analytics: Modified Inventory Report

Fields that were added
- Location Name
- Public Note (852 $z)
Final Version

- Added filtering
  - Put in alphabetical order/remove initial articles
- Moved columns around
  - Summary holdings and public notes fields were essential
<table>
<thead>
<tr>
<th>Title (Alphabetical Complete)</th>
<th>Summary Holding</th>
<th>Public note</th>
<th>Uniform Title (130 or 240 fields)</th>
<th>Location Name</th>
<th>ISSN (0221)</th>
<th>ISSN (0222)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Survey / National Association of Colleges and Employers.</td>
<td>v.45:no.4 2006:Fall; v.46:no.3-v.47:no.3 2007:Summer-2008:Summer; v.48:no.1 2009:Winter</td>
<td>Salary survey (Bethlehem, Pa.)</td>
<td>Periodicals</td>
<td>1520-8648</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AARP modern maturity.</td>
<td>v.45:no.2-v.46:no.1 (2002:Mar./Apr.: 2003:Jan./Feb.)</td>
<td>AARP the magazine (A ed.)</td>
<td>Periodicals</td>
<td>1541-9894</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AARP the magazine.</td>
<td>v.1:no.18-v.30:no.68 (2003:Mar./Apr.: 2007:Nov./Dec.)</td>
<td>AARP the magazine (A ed.)</td>
<td>Periodicals</td>
<td>1541-9894</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic therapy quarterly.</td>
<td>v.1-v.3 1965-1968</td>
<td>Shelved as: Academic therapy</td>
<td>Periodicals</td>
<td>1040-9777</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accountant.</td>
<td>no.5833/5844-no.8074/8085 (1990-2010)</td>
<td>Reference-Indexes</td>
<td>Microform</td>
<td>0001-4710</td>
<td>1541-9894</td>
<td></td>
</tr>
<tr>
<td>Accountants' Index Supplement.</td>
<td>[1st]-14th (1921:Jan./1922:Jan.-1929:Jan./1930:Dec.); 15th-40th (1931:Jan.-1943:Jan./1944:Dec.)</td>
<td>Reference-Indexes</td>
<td>Microform</td>
<td>0748-7975</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Final Version

- Checkbox for completion
- Needs Miriam attention field – the catch-all
The Inventory
Spreadsheet Revisions – Inventory begun

- Discards sheet added for titles that had slipped through the cracks
- The problems spreadsheet was basically made up as Margot went along
  - Inventory was done over a period of time with changes implemented as we worked
<table>
<thead>
<tr>
<th>Title</th>
<th>Volume/Issue</th>
<th>Year</th>
<th>Found on spreadsheet</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>aaas science books</td>
<td>9/1 - 10/4</td>
<td>1973-1975</td>
<td>Yes, Science books</td>
<td>MN: Added &quot;shelved as title&quot;</td>
</tr>
<tr>
<td>american association of university women outlook</td>
<td>83-3 86-1</td>
<td>1989-1993</td>
<td>Yes, Outlook</td>
<td>MN: Added &quot;shelved as title&quot;</td>
</tr>
<tr>
<td>american journal of nursing</td>
<td>114/1 - 119/11</td>
<td>2014-2019</td>
<td>Not in catalog</td>
<td>pull for discard</td>
</tr>
<tr>
<td>american journal of science</td>
<td>mfm ser 1 v1-49</td>
<td>1818-1846</td>
<td>Miriam is handling</td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>mfm ser 1 index</td>
<td>1846-1870</td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>mfm ser 1 v1-50</td>
<td>1818-1848</td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>mfm ser 2 index v1-10 21-50</td>
<td></td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>Mfm ser 3 v1-47</td>
<td>1871-1895</td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>Mfm ser 4 v1-22</td>
<td>1896-1906</td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>Mfm ser 4 index v1-10</td>
<td>1906-1992</td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td></td>
<td>Mfm ser 5 250-251</td>
<td>1952-1953</td>
<td></td>
<td>MN: Done</td>
</tr>
<tr>
<td>american civil war</td>
<td>15/6 - 16/5</td>
<td>2003 possibly in catalog as America's civil war?</td>
<td>MN: Added &quot;shelved as title&quot;</td>
<td></td>
</tr>
<tr>
<td>atq</td>
<td>37-62</td>
<td>1978-1986</td>
<td>note added</td>
<td>MN: These issues belong to previous title, American Transcendental Quarterly. I added a note in the catalog that they are shelved as ATQ.</td>
</tr>
<tr>
<td>broadcasting &amp; cable</td>
<td>v.139-v.141</td>
<td>2008-2011</td>
<td></td>
<td>MN: I cataloged the microfilm for this title and updated holdings.</td>
</tr>
<tr>
<td>canadian geographer &amp; educational bulletin author subject index 1951-1967</td>
<td></td>
<td></td>
<td>Listed as a book located in the periodicals <a href="https://galileo-westga.primo.exlibrisgroup.com/permalink/C1GALLI_UWG/14m33jg0/almamea951390645702961">https://galileo-westga.primo.exlibrisgroup.com/permalink/C1GALLI_UWG/14m33jg0/almamea951390645702961</a></td>
<td>MN: This index was recently cataloged for the periodicals collection.</td>
</tr>
</tbody>
</table>
Student Training

- Three circulation students were borrowed as inventory overlapped with Winter Break
- Most of the project had them either working in pairs or with Margot
- One student preferred looking at the physical issues and other preferred updating the spreadsheet
Student Training

- Students were provided with basic instructions
  - Check beginning and end dates, mark complete/make basic changes
  - Told to add anything complicated to the problems sheet for staff to fix

- Given a list of common issues
  - Different ending/beginning dates
  - Title listed as current but we no longer subscribe
  - Strange or inconsistent numbering/titles
  - MICROFILM
Problems Encountered - Technology

- “Adventures with an old ipad”
- lack of wifi in some areas
Problems Encountered - Titles

- Shelved as titles
- Titles that were still on the shelf despite supposedly being discarded
- Titles that were shelved out of order when they moved to the ground floor and this made confirming first and last issues very difficult
# Problems Encountered - Multiple Holdings Records

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Volume/Issue</th>
<th>Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>v.74:no.3-v.74:no.7 (1998:Nov.-1999:Apr.,)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>v.75:no.1-v.75:no.3 (1999:Sept.-1999:Nov.,)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>v.75:no.5-v.76:no.6 (1999:Feb.-1991:Sept./Oct.,)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>v.79:no.6-v.80:no.7 (1995:May-1996:Apr.,)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>v.77:no.1-v.77:no.8 (1992:Sept.-1993:June)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>v.84:no.1-v.96:no.6 (1999:Sept.-2012:June)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Periodicals-Microform</td>
</tr>
</tbody>
</table>
# Problems Encountered - Uniform Titles

<table>
<thead>
<tr>
<th>Uniform Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic review</td>
<td>v.24:no.1-v.35:no.2 (1988:1st qtr.-1999:2nd qtr.)</td>
</tr>
</tbody>
</table>
Problems Encountered – Infrastructure

- That time we found a shelf about to collapse
The Updates
Holding Levels for Serials


**Level 3**
- Summary level
- Gaps are not noted
- Not all levels of enumeration and chronology are represented
- Example: v.1-v.2 (1985-1986)

**Level 4**
- Detailed level
- Gaps are noted
- All levels of enumeration and chronology are represented
I often consulted these MARC fields to resolve questions during this project:

<table>
<thead>
<tr>
<th>Field</th>
<th>Name</th>
<th>How we used it</th>
</tr>
</thead>
<tbody>
<tr>
<td>362</td>
<td>Dates of Publication and/or Sequential Designation</td>
<td>To determine first and/or last issue for a title</td>
</tr>
<tr>
<td>780</td>
<td>Preceding Entry</td>
<td>To check holdings for preceding titles</td>
</tr>
<tr>
<td>785</td>
<td>Succeeding Entry</td>
<td>To check holdings for succeeding titles</td>
</tr>
<tr>
<td>515</td>
<td>Numbering Peculiarities Note</td>
<td>To confirm that unexpected issue numbering was indeed correct</td>
</tr>
</tbody>
</table>
Continuing Resources Bibliographic Records: Useful Fields, cont.

- Other useful fields
  - 008/07-14: Date1 and Date2 fixed fields (can quickly see "lifespan" of journal)
  - 500: General Note (gives info on alternative numbering schemes)
  - 525: Supplement Note

- Tip: Be mindful of format changes when "hopping" from record to record using the 780/785 linking fields
Simple Microfilm Box Label Problems

- Incorrect title
- Incorrect open holdings
- Incorrect begin/end dates for titles filmed together
Incorrect Title

- **Bulletin - American Association of School Physicians** had been incorrectly labeled as **American Association of School Physicians Bulletin**
Incorrect Open Holdings

The Journals of Gerontology. Series B, Psychological Sciences

BEFORE

AFTER

Rural Sociology

BEFORE

AFTER
Incorrect Begin/End Dates for Titles Filmed Together

*Dun’s Review*

- The previous label said that *Dun's Review* ended with v.92 (1968), and its succeeding title *Dun's* began with v.93 (1970)
- After cataloging review, the label was corrected to say that *Dun's Review* ends with v.94 (1969), and its succeeding title *Dun's* begins with v.95 (1970)
Items From Other Locations Shelved in Periodicals Area
Similarly Titled Government Document


- Discovered next to the *Physics and Chemistry of Solids* dummy block; to add to the confusion, its spine title was simply "Physics and Chemistry"
- I scanned in the volume, confirmed correct holdings in Alma and OCLC, and reshelved the volume in the 1<sup>st</sup> floor govdoc area
"Duplicate" Titles

Appearances can be deceiving.
Gap Confusion

*Supervisory Management and Supervisory Management (Saranac Lake, N.Y.: 1989)*

- **BEFORE:** A person could assume that both sets of holdings were for the same title, with a gap.
- **AFTER:** In reality, two titles were in the box; the "gap" was an interceding title that we don't own.
Legitimately Uncataloged Titles

Not everything requires a record.
Supplements that Don't Get Their Own Record

- **Weather Log** is a section of *Weather* (ISSN 0043-1656)
  - LC record has a 500 note and 740 uncontrolled related title entry
- Cataloging follow-up
  - Add *Weather Log*'s holdings to the record for *Weather*:

<table>
<thead>
<tr>
<th>852</th>
<th>8_</th>
<th>lb INGRAM</th>
<th>c per</th>
<th>h ZP 1634</th>
<th>lg Shelved alphabetically by title</th>
</tr>
</thead>
<tbody>
<tr>
<td>866</td>
<td>41</td>
<td>8 0</td>
<td>a v.28:no.1-v.61:no.12 (1973:Jan.-2006:Dec.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>866</td>
<td>41</td>
<td>8 0</td>
<td>a &quot;Weather log&quot; (2001:Nov.-2003:Oct.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Overlooked Titles

Titles that appeared to fit in with their cataloged companions and were thus never cataloged.
E-ITV

- Not cataloged
- Was shelved with previous title *Educational and Industrial Television*
- Items already had "shelve as" labels, so I only needed to update the holding record
What a difference a space makes.
Data Base vs. Database

- *Data Base* (ISSN 0095-0033) was on the shelf but not cataloged
- Distinguish from existing cataloged title *Database* (ISSN 0162-4105)
Titles on the Shelf That Were Not Cataloged

Better late than never.
Welfare In Review

- This title was clearly labeled and was shelved under its own name
- We owned nine years' worth of microfilm, but it was not cataloged
Issues Shelved
With Preceding or Succeeding Titles

Nope, it's the other title.
Incorrectly Shelved Together

NASSP Newsleader, vol. 46, no. 9 (May 1999)

Cover vs. Title Page

- Some issues of *American Transcendental Quarterly* were shelved with succeeding title ATQ.
- Although the cover title is ATQ, the title page gives the title as *American Transcendental Quarterly*.
Title Change for Only a Few Issues

- *Econtent* was shelved with preceding title *Database*
- Since there were too few issues to shelve on their own, I added a "shelved as" note in the catalog and affixed "shelve as" labels to the *Econtent* issues
Sandwiched Titles

A microfilm roll can be full of surprises.
Criminologica

- Discovered by chance during reconciliation phase
- Cataloged, but only the reel was labeled
- Cataloging follow-up: Double-check holdings for both titles; add note in the catalog; add two new box labels
Community and Junior College Journal

Shelved as: Junior College Journal

- The first reel contained issues of Junior College Journal, but the remaining reels were Community and Junior College Journal.
Community and Junior College Journal (cont.)

- Even though the box mostly contained reels of Community and Junior College Journal, it was labeled and shelved as Junior College Journal--which was itself not cataloged.
Community and Junior College Journal (cont.)

- Cataloging follow-up:
  - Catalog *Junior College Journal* with a "shelved as" note
  - Add box labels for *Community and Junior College Journal* and its constituent title
  - Reshelve
Journal of Physical & Colloid Chemistry

- Sandwiched between Journal of Physical Chemistry and Journal of Physical Chemistry (1952)
- Had been cataloged with a "shelved as" note, but shelf holdings were not labeled
- I added box and reel labels to clarify holdings
Inaccurate Binding Titles

Don't judge a book by its cover...or its spine.
Shelved as "Federal Reserve Bank of New York"
Clarification Needed

- BEFORE: The block label for School Physicians' Bulletin used nonstandard holdings description and had a few missing letters
- AFTER: A new label was applied and covered with clear tape
Titles Misshelved Due to Similar Appearance

Don't blink—you'll miss it.
Same Layout and Colors, but Different Title

- The last six issues of *Performance + Instruction* (ISSN 0884-1985) were shelved with the first issues of succeeding title *Performance Improvement* (ISSN 1090-8811)
Yes, it's all the same title.
Absorbed by Another Title

Our first six issues of *Sales & Marketing Management* had two numbering changes:

- v.162:no.1 (2010:Jan./Feb.) → v.10:no.1 (2012:Jan./Feb.), when it was absorbed by *SalesForceXP* and adopted its numbering
- v.10:no.6 (2012:Nov/Dec.) → v.94:no.1 (2013:Jan./Feb.)
Shelflisting
Decisions

When following the rules may confuse (human) browsers.
XVIII: New Perspectives on the Eighteenth Century

Shelved as: New Perspectives on the Eighteenth Century

Library of Congress Classification and Shelflisting Manual G 100.14.b: "File numbers expressed in digits...or other notation (e.g., XXVII) before letters of the alphabet."
RBER: Review of Business and Economic Research

Shelved as: Review of Business and Economic Research

Library of Congress Classification and Shelflisting Manual G 100.11.b: "Treat acronyms and initials not separated in any way as single words regardless of capitalization."
Huge Runs of Title Changes Shelved Together

*Parents* magazine on the shelf, 1929 to 2011.
Eleven titles were shelved as *Parents* magazine, covering 1926 to 2011:

- *Children (New York, N.Y.),* 1926-1929
- *Parents' Magazine,* 1929-1953
- *Parents' Magazine & Better Family Living,* 1973
- *Parents Magazine (Bergenfield, N.J.)*, 1977-1978
- *Parents (Bergenfield, N.J.)*, 1978-1985
Three titles and part of a fourth were shelved as Southern Association Proceedings, covering 1948 to 1969:

- *Proceedings of the ... Annual Meeting of the Southern Association of Colleges and Secondary Schools*, 1932-1961
- *Proceedings of the ... annual meeting of the Southern Association of Colleges and Schools*, 1962-1963
- Southern Association of Colleges and Schools. Meeting. *Proceedings of the ... annual meeting*, 1964
Titles Misshelved Due to Typography
Ziff Davis Smart Business

Shelved as: Smart Business

- Added a "shelved as" note in the catalog
- Did not add "shelve as" labels to the issues because this title is scheduled to be discarded
Titles That Were Just Strange
Wild Bird

- A single issue of *Wild Bird*, in a magazine holder all its own
- This title was not listed in our MS Access serials database
- We don't know where it came from or why it has no accompanying issues
Titles That Were Wonderful Surprises

Sometimes you get lucky.
GBEA Journal

- A single issue of Georgia Business Education Association Journal v.1:no.1 (1980:Fall) was shelved with GBEA Armchair Bulletin
- Since this is the first issue, I can use it to update the existing description, which was based on a much later issue
The Lessons
What We Would Have Done Differently

- More formalized problems spreadsheet
- Occasional duplication of work
  - Miriam sometimes fixed things while Margot was still in the stacks working on it
  - Let the other know you’re done with your portion
Cataloging Tips and Tricks
Holdings Statements

- Construct holdings statements according to ANSI/NISO Z39.71-2006 (R-2011), Holdings Statements for Bibliographic Items
- In most cases, level 3 (summary) holdings are sufficient when labeling the microfilm on the shelf, especially if you use level 4 (detailed) holdings in your catalog
  - Exception: When more than one title was filmed on a single microfilm reel, we used detailed level holdings on the box label
Physical Processing

- Work from the item itself
  - Pull all the microfilm you need to relabel
  - Create the new labels at the shelf
  - Take photographs at the shelf (this is what we did)
- Use card stock for the microform box labels, as they are more durable and are easier to insert
  - If unable to print on your cardstock, consider using a typewriter
- Be mindful of label clutter when dealing with several title changes in one microfilm box
Special Considerations for Newspapers

- Multiple levels of chronology and enumeration
- Balance the desire for detailed holdings against other considerations, such as likelihood of future weeding and staff time
- Missing or illegible issues
- Microfilm considerations
  - Time spent scrolling
  - Equipment condition
  - Patron needs
- Perform your newspaper inventory last, or when you have time to spare
Final Stats
After All This, We Found...

- Out of 2995 titles we were unable to account for 6 of them
- Twelve additional titles were cataloged
- One shelf that was about to collapse
Next Steps
Next Current Steps

- Finding titles that are supposed to be down there but are not
- Begin comparison of electronic journals and physical journals
  - To be completed (originally) January 2024
  - We did almost 800 titles in one week
<table>
<thead>
<tr>
<th>Title [Complete]</th>
<th>Print Holding</th>
<th>Title [Complete]</th>
<th>Uniform Title [ISSN or DOAJ]</th>
<th>ISSN [OCLC]</th>
<th>Own Electronically</th>
<th>Electronic Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>AARP bulletin</td>
<td>v. 58:no.1-v.95:no.1 (1974 Jan-2012 Jan.)</td>
<td>AARP bulletin</td>
<td></td>
<td>0149-1423</td>
<td>Problem with access</td>
<td>Supposed to have access from 1974-present. No access currently</td>
</tr>
<tr>
<td>AARP modern maturity</td>
<td>v. 46:no.2-v.46:no.1 (2002 Mar./Apr.-2003 Jan./Feb.)</td>
<td>AARP modern maturity</td>
<td></td>
<td>1628-5992</td>
<td>Yes</td>
<td>No overlap with print</td>
</tr>
<tr>
<td>AARP the magazine</td>
<td>v. 46:no.28-v.50:no.68 (2003 Mar./Apr.-2007 Nov./Dec.)</td>
<td>AARP the magazine</td>
<td></td>
<td>1541-5804</td>
<td>Yes</td>
<td>Holdings start 46/4c (July 2003) to end of print holdings</td>
</tr>
<tr>
<td>ABA banking journal [microform]</td>
<td>v. 71:no.4-v.78:no.12 (1979 Apr.-1986 Dec.)</td>
<td>ABA banking journal [microform]</td>
<td></td>
<td>0194-1947</td>
<td>Yes</td>
<td>All holdings covered electronically</td>
</tr>
</tbody>
</table>
Questions?