Making the Unseen Seen: Discovering Discrepancies and Shedding Light on Automated E-Resource Reconciliation

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Reconciliation at NCSU Libraries
Ejournal Reconciliation
Original Reconciliation Database
Early Reconciliation Process
**Package Changes Database**

**Matth’s Package Work**

| Title Name | Central European Journal of Biology |
| PO | PO-36933 |
| Action | Open Access |
| From | SPRINGERLINK |
| To | De Gruyter Open |
| Effective Date | 12/31/2014 |
| Source | EBSCO |

**Please populate the fields below, if possible:**

| Vendor Action | Ceased |
| Vendor | EBSCO |
| Old Title Number | 189857758 |
| New Title Number | |
| Old Format | Online |
| New Format | |
| Old PO | PO-36933 |
| New PO | |
| 2014 Cost | $0.00 |
| 2015 Cost | $0.00 |

**Workflow Checklist:**

- **NA**: Check box if the change will not affect our titles
- **Phase 1**: Check box if SIri work has been completed
- **Phase 2**: Check box if SerSol work has been completed

*If background is orange, list is currently filtered*
Serials Data Warehouse

Main Menu

- Open Publisher Reconciliation Tool
- Open SerSol Reconciliation Tool
- Open Ebsco Reconciliation Tool

Ver. 20160317
Knowledgebase Reconciliation

SerSol Reconciliation Tool

This tool compares the SerSol SSJ Report with the Sirsi orderline report from the current fiscal year.

- **Resolve ISSNL Issues**: Opens a form for viewing ISSNs with no matching ISSN-L with an option to create a matching ISSN-L

- **View/Export Unmatched List**: Opens a form for viewing all unmatched titles with an option to export as a spreadsheet

- **View/Export Matched List**: Opens a form for viewing all matched titles with an option to export as a spreadsheet

- **Documentation**
# Finding Unmatched

## View Unmatched Records

<table>
<thead>
<tr>
<th>Source</th>
<th>ISSN L</th>
<th>PO</th>
<th>JournalID</th>
<th>Title</th>
<th>Database</th>
</tr>
</thead>
<tbody>
<tr>
<td>SerSol</td>
<td>1752-1386</td>
<td></td>
<td>ssj0061974</td>
<td>Cambridge journal of regions, economy and society</td>
<td>Oxford Journals</td>
</tr>
<tr>
<td>SerSol</td>
<td>1532-2114</td>
<td></td>
<td>ssj0011534</td>
<td>European journal of echocardiography</td>
<td>Oxford Journals</td>
</tr>
<tr>
<td>SerSol</td>
<td>0022-0744</td>
<td></td>
<td>ssj0017410</td>
<td>Journal of electron microscopy</td>
<td>Oxford Journals</td>
</tr>
<tr>
<td>SerSol</td>
<td>0882-228X</td>
<td></td>
<td>ssj0000299</td>
<td>Magazine of history</td>
<td>Oxford Journals</td>
</tr>
</tbody>
</table>
Ebook Reconciliation
The Requirements Statement

Emerging Requirements

Redesign

Six Months Later

Source: https://www.pinterest.com/pin/208010076511333665/
Design Meets the Needs

Ebook Reconciliation Needs:
- What packages/titles have we bought?
- When did we buy them?
- Are they discoverable?

Ebook Reconciliation Database Design:
- Publisher/package/title relationship
- Title list certification
- Access verification
Database Landing Page

Reconciliation

- Duke University Press Unmatched
- McGraw Hill Unmatched
- Cambridge Unmatched
- Ice (Institution of Civil Engineers) Unmatched
- Wageningen Unmatched
- Springer Unmatched
- IOP Unmatched
<table>
<thead>
<tr>
<th>Status</th>
<th>Completed</th>
<th>Book Title</th>
<th>ISBN13</th>
<th>URL</th>
<th>Package</th>
<th>ppubyr</th>
</tr>
</thead>
<tbody>
<tr>
<td>mm</td>
<td></td>
<td>No Sirsi Match</td>
<td>How Immigrants Impact Their Homelands</td>
<td>9780822397971</td>
<td><a href="http://dx.doi.org/10.1115/9780822397971">http://dx.doi.org/10.1115/9780822397971</a></td>
<td>Duke University Press e-Book Collection 2013</td>
</tr>
<tr>
<td>mm</td>
<td></td>
<td>No Sirsi Match</td>
<td>Early Modern English Dictionaries</td>
<td>9780822397602</td>
<td><a href="http://dx.doi.org/10.1115/9780822397602">http://dx.doi.org/10.1115/9780822397602</a></td>
<td>Duke University Press e-Book Collection 2013</td>
</tr>
<tr>
<td>mm</td>
<td></td>
<td>No Sirsi Match</td>
<td>The Supreme Court and the Constitution</td>
<td>9780822397979</td>
<td><a href="http://dx.doi.org/10.1115/9780822397979">http://dx.doi.org/10.1115/9780822397979</a></td>
<td>Duke University Press e-Book Collection 2013</td>
</tr>
<tr>
<td>mm</td>
<td></td>
<td>No Sirsi Match</td>
<td>Renaissance Translations: Lucretius and Tasso</td>
<td>9780822397830</td>
<td><a href="http://dx.doi.org/10.1115/9780822397830">http://dx.doi.org/10.1115/9780822397830</a></td>
<td>Duke University Press e-Book Collection 2013</td>
</tr>
<tr>
<td>mm</td>
<td></td>
<td>No Sirsi Match</td>
<td>Picturing Imperial Power: Colonial Subjects in Eighteenth-Century C.</td>
<td>9780822397496</td>
<td><a href="http://dx.doi.org/10.1115/9780822397496">http://dx.doi.org/10.1115/9780822397496</a></td>
<td>Duke University Press e-Book Collection 2013</td>
</tr>
</tbody>
</table>

**Error Codes:**
- Access issue
- Add to publisher list
- Ignore
- Not in Serials Solutions or in the correct database
- No marc record in Serials Solutions
- No rights
- Not in Sirsi
- In Serial Solutions, but not tracked
- Review
- Reconcile later
- No Vendor Mar: Imperial debris [electronic resource]: on ruins and ruination
- No Vendor Mar: La patria del anillo [electronic resource]: an interpretation
- No Vendor Mar: Coloniality at large [electronic resource]: Latin America and...
The Outcomes

- Manage discrepancy
- Ensure accurate access
- Grow necessary knowledge and skills
Is your project in a good shape? Apparently.

We started 5 years ago and no one has stopped us yet.

One year in an IT project - Day 19.
Next Step for Ebook Reconciliation

- Ongoing ebook package reconciliation
- Database enhancements
  - Report function
  - Integration with other pilot projects on e-resource management