Perpetual Access Information in Serials Holdings Records

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In Absentia

Steven Knowlton, Head of Collection Management (University of Memphis)

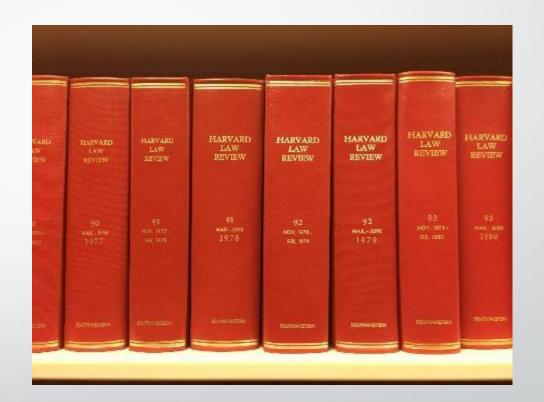
Rachel Scott, Integrated Library Systems Librarian (University of Memphis)

Background



What Is Perpetual Access?

A Quick Overview



Definitions

"...the right to permanently access licensed materials paid for during the period of the licensed agreement."

Digital Library Federation's Electronic Resources Management Initiative (2004)

"...access to the years of content paid before the affected serials were canceled, ceased publication, or transferred to different publishers."

Sarah Glasser (2014)

Challenges

- Vague terms in license agreements
- Coverage of terms
- Delivery of content
- Fees
- Staff time
- Tracking strategies





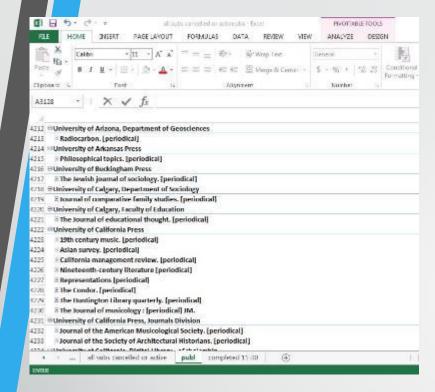


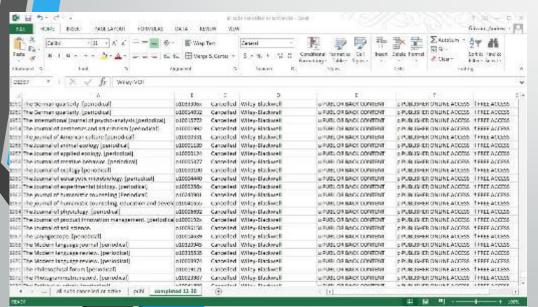
Strategies

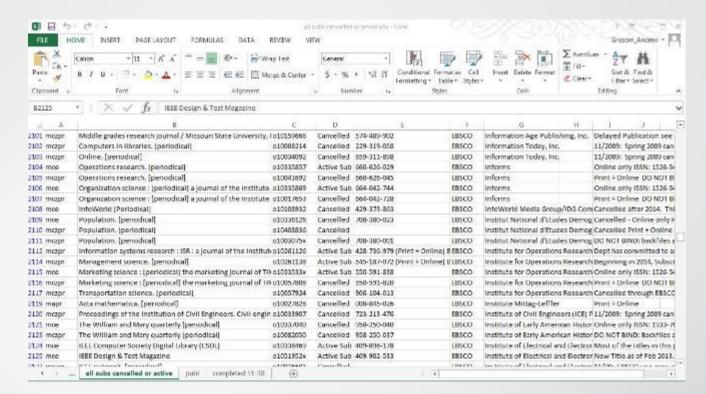
- Electronic Resource Management Systems (ERMS)
- Integrated Library Systems (ILS)
- Spreadsheets
- Link Resolvers
- Subscription agent platforms

Calvert's Model

- Does the publisher/license grant perpetual access?
- To which years are we entitled access?
- Which years can we currently access?
- How much time should staff spend on resolving discrepancies?
- Goals: "to ensure perpetual access is set up properly when a journal is cancelled; to assist staff when troubleshooting access problems; and to verify ongoing access to the title."







Tracking Perpetual Access

AKA Lots & Lots of Spreadsheets!

Hunting For Publishers & Licenses

- 871 Society for Industrial and Applied Mathematics
- 872 Society for Japanese Studies
- 873 Society for Military History
- 874 Society for Neuroscience
- 875 Society for Personality Research (Inc.)
- 876 Society for Photographic Education
- 877 Society for Range Management
- 878 Society for Sedimentary Geology (SEPM)
- 879 Society for Technical Communication
- 880 Society for the Study of Amphibians and Reptiles
- 881 Society for the Study of Mediaeval Languages and Literature
- 882 Society for the Study of Myth and Tradition
- 883 Society for Theatre Research
- 884 Society of American Archivists
- 885 Society of American Foresters
- 886 Society of Applied Anthropology
- 887 Society of Biblical Literature
- 888 Society of Cartographers
- 889 Society of Ethnobiology
- 890 Society of Exploration Geophysicists
- 891 Society of Motion Picture and Television Engineers/Allen Press, Inc.
- 892 Society of Tribologists and Lubrication Engineers
- 000 Cail Caianas Casiatu of America



License Analysis

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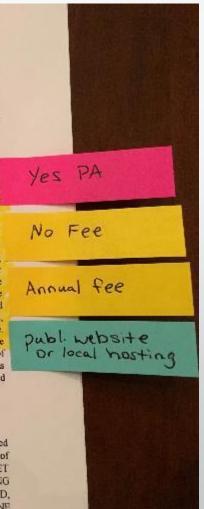
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Metadata: Sierra Options

Fixed-Length Fields

- Single character "codes" and corresponding label of up to twenty-five characters
- Limited maximum number of codes in each fixed-length field
- Appear in every record of a given type but are not repeatable
- Generates cleaner reports

Serial Code 1

p CONTENT PUBL UNDER SUB

Variable-Length Fields

- Free text
- Much longer length limits
- Repeatable
- Leave room for human error
- More difficult for generating reports

Examples

Internal Note

Publisher has account with Portico for backup access.

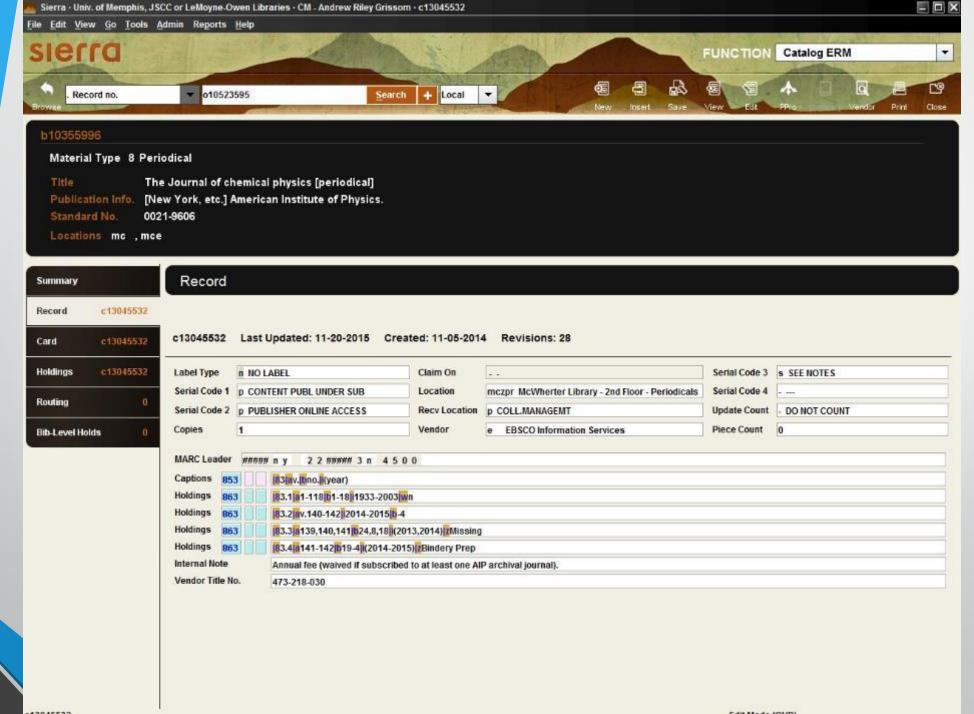
Which Record Type?

- **×** Bibliographic
- Item
- Order
- ✓ Holdings

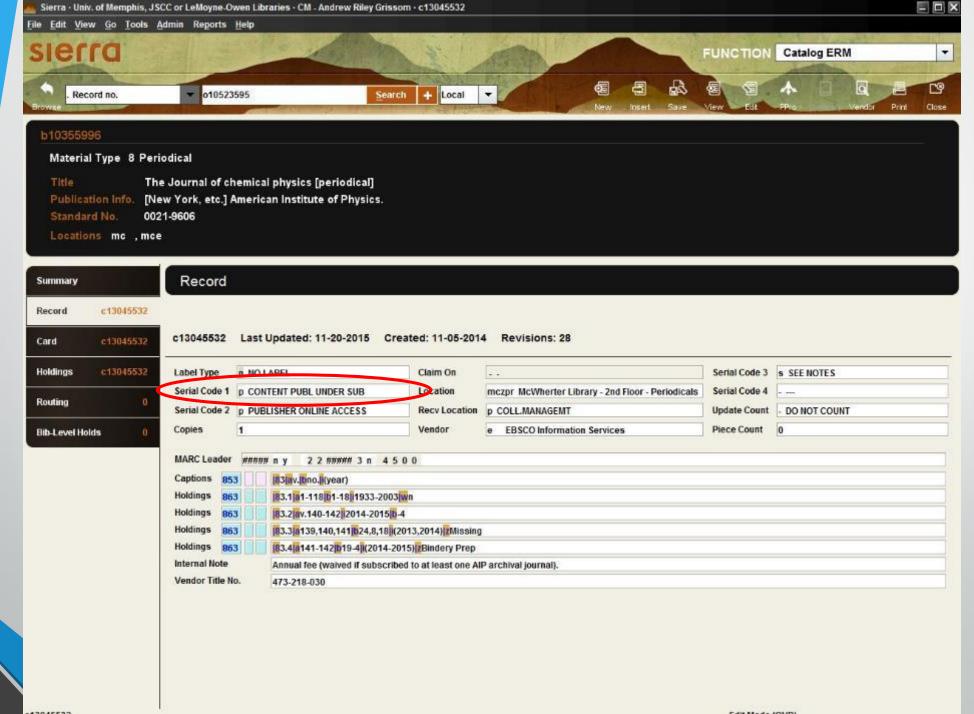


Serial Code 1 (Coverage)	Serial Code 2 (Location)	Serial Code 3 (Cost)
b BACK CONTENT	a PHYS ARCHIVAL MEDIA	a ANNUAL FEE
c PUBL+CEASED CONTENT	c PUBL CHOICE OF LOCATION	f FREE ACCESS
f PA INFO NOT FOUND	e E-FILES SENT BY PUBL	o ONE-TIME FEE
n NO PERPETUAL ACCESS	f E-FILES OR PUBL ONLINE	n NON-SPECIFIED FEE
p CONTENT PUBL UNDER SUB	m ARCH MEDIA OR 3RD PARTY	r ONE-TIME+REPLACEMENT FEES
s SEE NOTES	o PUBL OR 3RD PARTY ONLINE	s SEE NOTES
t PUBL+TRANSFERRED CONTENT	p PUBLISHER ONLINE ACCESS	
u PUBL OR BACK CONTENT	r ARCH MEDIA OR PUBL ONLINE	
	s SEE NOTES	
	t 3RD PARTY ONLINE ACCESS	

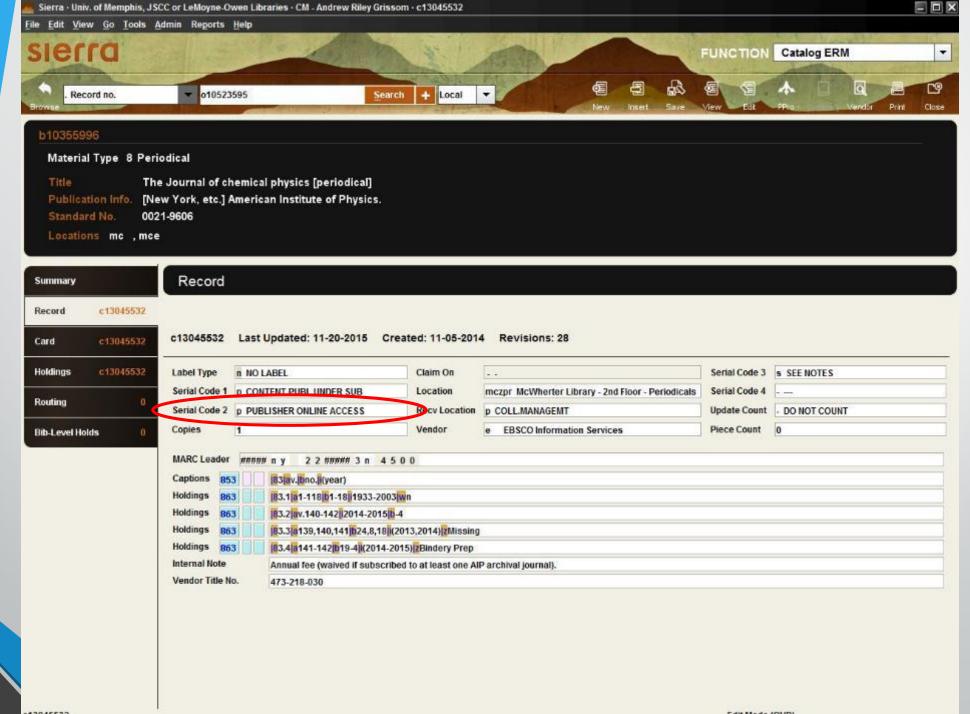
Publisher/License	Serial Code 1	Serial Code 2	Serial Code 3	Internal Note
AIP Publishing	p CONTENT PUBL UNDER SUB	p PUBLISHER ONLINE ACCESS	s SEE NOTES	Annual fee (waived if subscribed to at least one AIP archival journal).
Emerald	t PUBL+TRANSFERR ED CONTENT	f E-FILES OR PUBL ONLINE	s SEE NOTES	Free access to merged journals unless a title substitution is made. Perpetual access to all licensed materials requires new license.
London Review of Books	p CONTENT PUBL UNDER SUB	s SEE NOTES	f FREE ACCESS	Publisher sends copies in facsimile or text format.



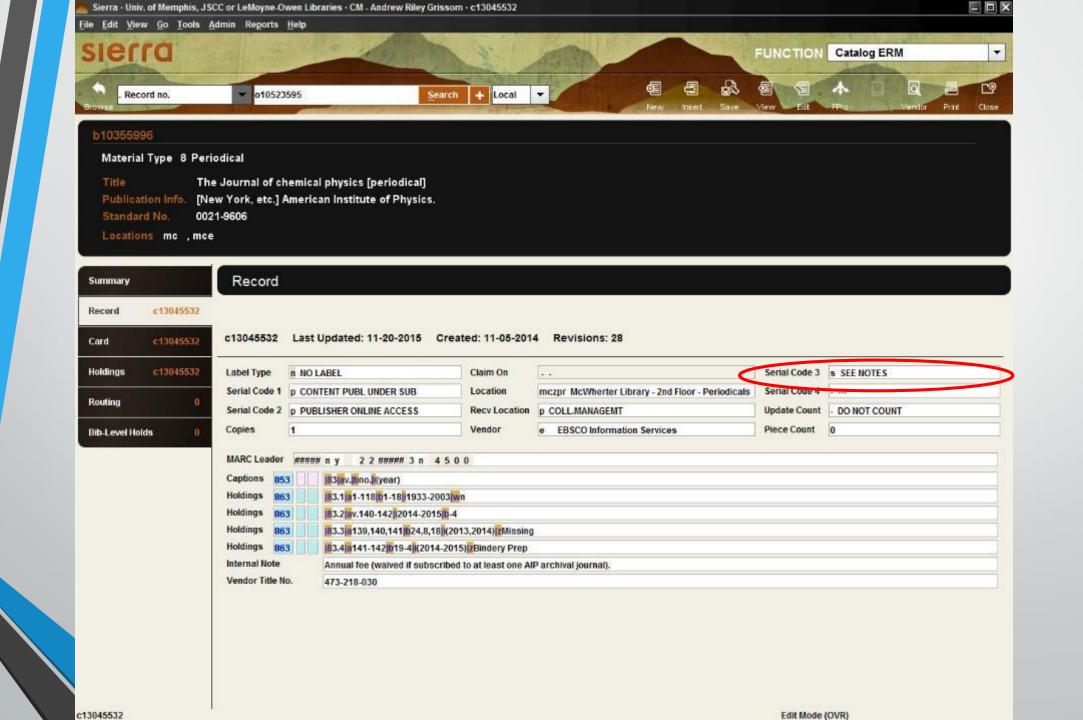
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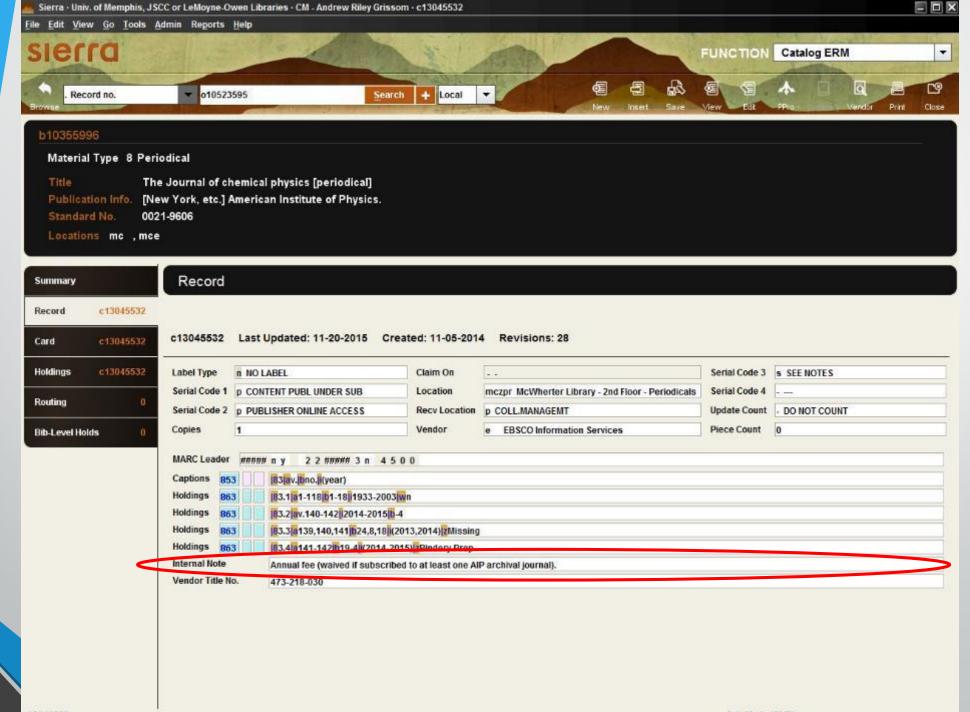


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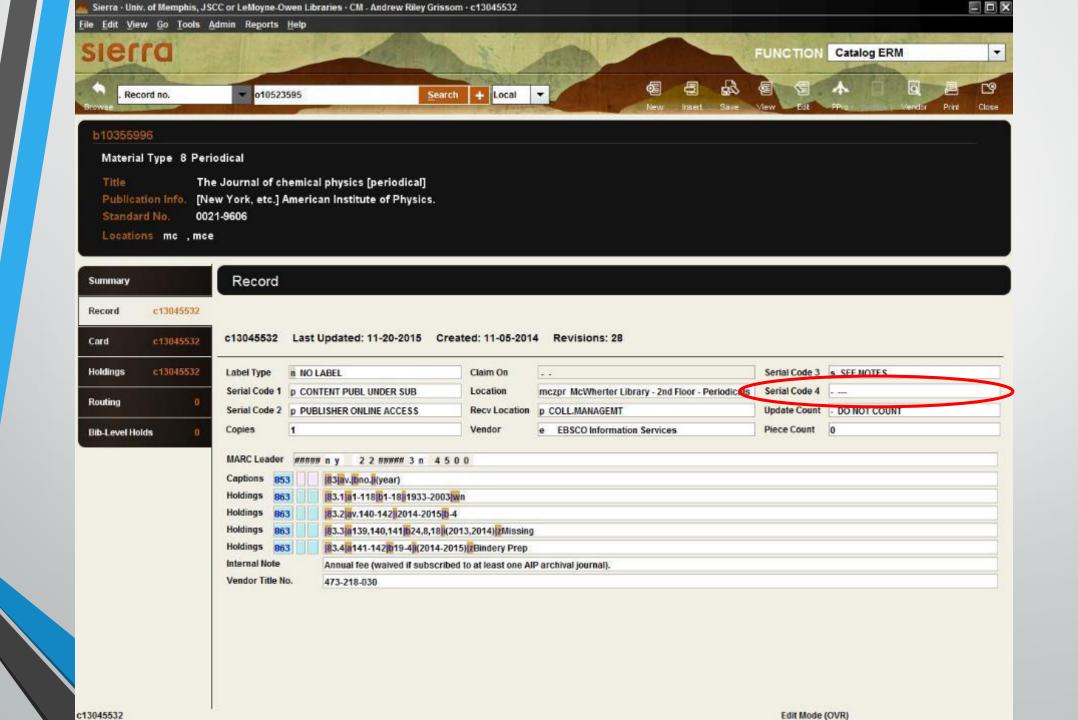


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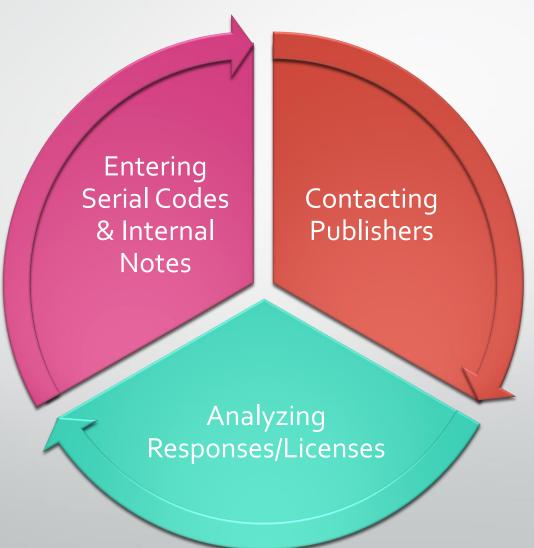




c13045532 Edit Mode (OVR)



Keep Going!

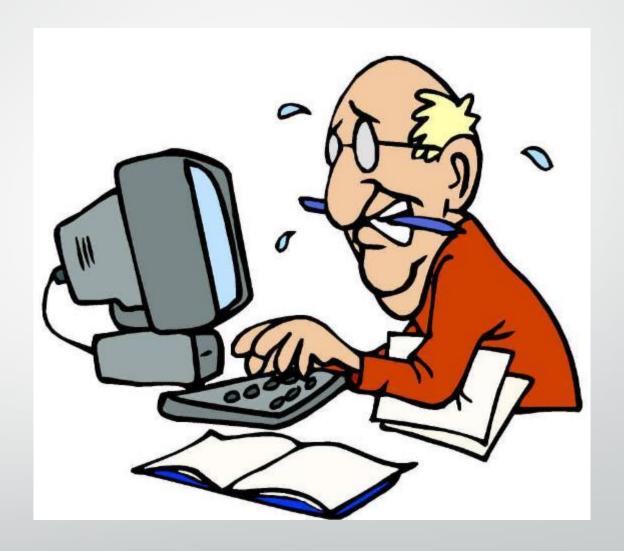




Digging Into Create Lists

Strategies To Improve Efficiency

Manual Entry

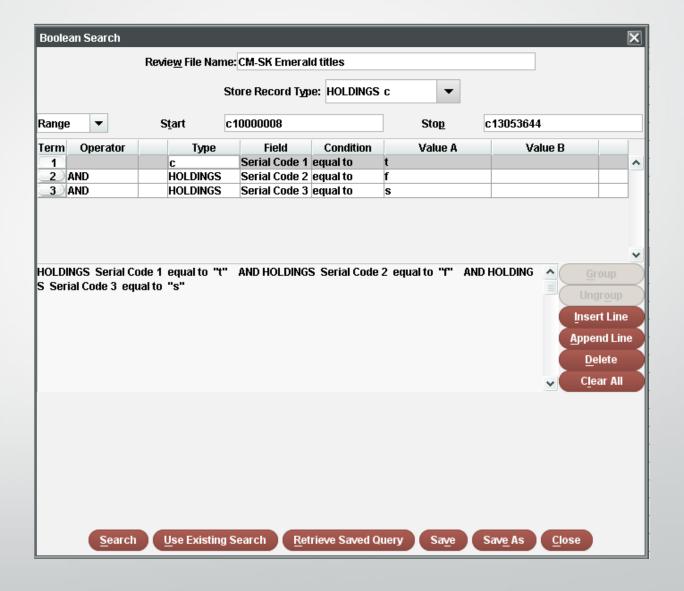


Attempts With Global Updates

- Serial bibliographic records
- Order record numbers
- ✓ Serial Codes 1, 2 and 3



Global Updates For Variable-Length Fields

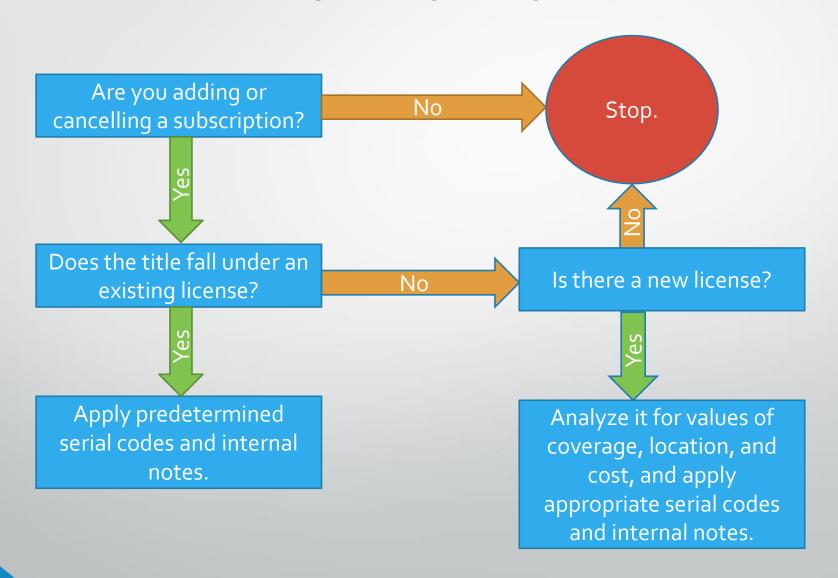


Results

By the end of my practicum, we encoded perpetual access information for:

- 1,660 unique serial titles, from
- 38 publishers.

New Workflow!



Applications

	Α	В	С	D	E	F
1	Title	Record Number	PERPETUAL ACCESS	LICENSE HOLDER	LATEST STEPS	RESOLUTION
					emailed craigb@aiaa.org;	
					jessicas@aiaa.org;	
				American Inst of	rmatthews@pcgplus.com for a	
2	Journal of propulsion and power. [periodical]	b16603643 🔻	no P.A.	Aeronatics & Astronautics	quote	P.A. included per email
					emailed craigb@aiaa.org;	
					jessicas@aiaa.org;	
				American Inst of	rmatthews@pcgplus.com for a	
3	AIAA journal. [periodical]	b10802423	no P.A.	Aeronatics & Astronautics	quote	P.A. included per email
					phoned Anne Patota, 800-365-	
4	Social cognition [periodical]	b15838250	no P.A.	Guilford Press	7006, ext. 217 to ask for info	
					phoned Meredith 212-358-	
					6468; she will give us info on PA	
5	William and Mary quarterly [periodical]	b1068900x	no P.A.	JSTOR	and send a copy of L.A.	
				National Council for the		
6	Middle level learning.	b21068720	no P.A.	Social Studies		
					submitted help request, ticket #	
7	Nature physics (Online);"Nature physics [electronic resource]."	b21871449	no P.A.	Nature	00387428	
				Philosophy Documentation	submitted forms to initiate	
8	Environmental ethics. [periodical]	b10203862	no P.A.	Ctr	access with Portico	Portico has begun the process of
				Philosophy Documentation	submitted forms to initiate	
9	Graduate faculty philosophy journal. [periodical]	b10270383	no P.A.		access with Portico	Portico has begun the process of
				Philosophy Documentation	submitted forms to initiate	
10	Idealistic studies. [periodical]	b10341560	no P.A.	Ctr	access with Portico	Portico has begun the process of

From The Patron's Point Of View

- "Clean" links that lead to actual content
- Accurate holdings information
- Seamless access to journal content



from 1971 to present in <u>Philosophy Documentation Center Collection</u>
from 1976 to 2011 in <u>McWherter Library Print Serials (2nd floor)</u>
from 2012 to 2015 in <u>Portico (University of Memphis holdings)</u>

Title Idealistic studies. [periodical]

Imprint [Worcester, Mass.] Clark University Press.

Online availability:

Online issues available via Portico, 2012-2015

Location McWherter Library - 2nd Floor - Periodicals

Holdings v.6 (1976) - v.25 (1995),

v.27 (1997) - v.41 (2011)



ELECTRONIC JOURNALS ELECTRONIC BOOKS DIGITIZED COLLECTIONS

Access

🗫 = Perpetual Access

= Not ingested

DOWNLOAD HOLDINGS

COMPARE HOLDINGS

Search Publication Titles & 1

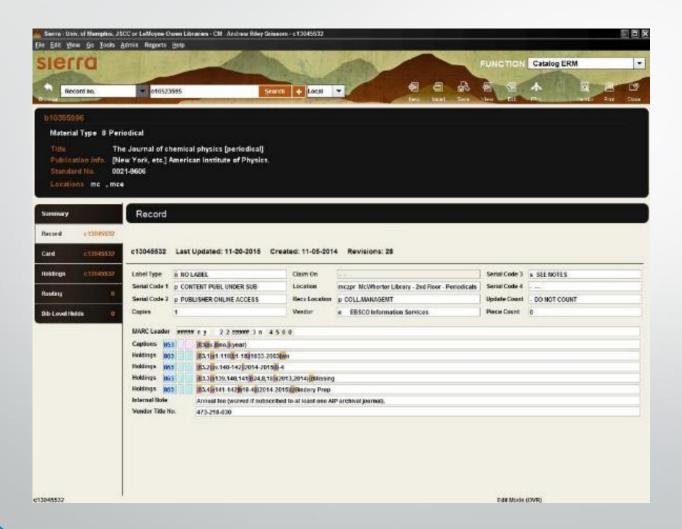
Journal Titles

Book Titles

	Journal	ISSN	Publisher
o-	Annals of Clinical Psychiatry	15473325, 10401237	Taylor & Francis Group
	Astronomy Education Review	15391515	American Astronomical Society
0	Australian and New Zealand Journal of Audiology	14434873	Australian Academic Press (through 2011)
0	Auto/Biography	14799715, 09675507	SAGE Publications
0	Brief Treatment and Crisis Intervention	14743329, 14743310	Oxford University Press
0	Environmental Ethics	01634275, 21537895	Philosophy Documentation Center
0	European Journal of Morphology	17444241, 09243860	Taylor & Francis Group
0	Graduate Faculty Philosophy Journal	21539197, 00934240	Philosophy Documentation Center
0	Graft	15221628	SAGE Publications
O	Human Genomics and Proteomics	17574242	SAGE Publications
O	Idealistic Studies	00468541, 21538239	Philosophy Documentation Center

All O-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y

Conclusion





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