

POST CANCELLATION ACCESS JOURNAL COLLECTIONS TO IMPROVE LIBRARY SERVICES

2023 Charleston Conference

<https://link.mnsu.edu/charleston23>

Good Morning, as we start, we recognize that it's not always possible to catch all the details of these sessions, so we've provided a link to our presentation here, and you'll also see the URL at the footer of the next few slides.



**MINNESOTA STATE
UNIVERSITY, MANKATO**

LIBRARY SERVICES

**Pat Lienemann,
*eAccess & Discovery Librarian***

**Annalis Luck,
*ER Access Technician***

**Nat Gustafson-Sundell,
*Collections Librarian***

<https://link.mnsu.edu/charleston23>



On behalf of my co-presenters, welcome to this session on Post Cancellation Journal Collections.

My name is Pat Lienemann and am joined by two of my colleagues from Minnesota State University, Mankato – Annalis Luck and Nat Gustafson-Sundell.

Our institution is a regional public access university with about 14,000 full-year-equivalent students. We are located in South Central MN (depicted by the yellow blob on the map), where the Minnesota River alters course to the Northeast heading towards Minneapolis/St Paul and the Mississippi River.

We are an Alma Management Systems User, and for better or worse, much of our work is mediated through Alma/Primo. Although the detailed information we will provide is based on this system, the concepts and applications will be potentially useful to anyone engaged in this kind of work, regardless of the library system utilized.

Online Access Options

Full text availability

Elsevier PCA Rights Collection Available from 01/01/1993 volume: 18 issue: 6.	SHOW LICENSE	🔗
ScienceDirect Freedom Collection 2023 Available from 1995 volume: 21 issue: 1.	SHOW LICENSE	🔗



Post Cancellation Access ≈ Post Termination Access ≈ Perpetual Access

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Today we will be talking about our ongoing project to create Post Cancellation Access collections and how we use them to support core library functions, including collection development and instruction. I will start with an overview on PCA collections, Annalis will continue with a how-to demonstration to create these collections, and then finally Nat will review of several applications.

A quick comment on vocabulary: there are many similar terms for this type of right (Post Cancellation Access, Post Termination Access, Perpetual Access, etc.). I think our group mostly refers to these as PCA rights, but we view all these terms as roughly equivalent, so don't let that throw you off.

Current vs Perpetual

18	 10011 00111 11010	ScienceDirect Freedom Collection 2023 (Elsevier SD Complete Freedom Collection [SCCMFC]) Do not show as Full Text available in CDI even if active in Alma: No Interface name: Elsevier ScienceDirect Linking Level: Article Creation Date: 10/05/2022 14:39:15 CDT Modification Date: 10/30/2023 04:45:09 CDT	Available for CDI search activation  Active for Search in CDI: No Search Rights in CDI: Free Full Text Rights in CDI: Subscription (Title Level) Full Text Linking in CDI: Linkresolver	Orders: 1	Portfolio List (2253) Edit Collection ...	Collection ID: 61148205290004301 MMS ID: 9990008925504301 Type: Selective package Services: Full Text (Available) Provider coverage: No CDI Type: Full Text Collection CDI Collection ID (DB ID): ACRLP
14	 10011 00111 11010	Elsevier PCA Rights Collection (Elsevier ScienceDirect Journals Complete) Do not show as Full Text available in CDI even if active in Alma: No Interface name: Elsevier ScienceDirect Linking Level: Article Creation Date: 08/02/2022 13:08:12 CDT Modification Date: 05/30/2023 24:26:52 CDT	Available for CDI search activation  Active for Search in CDI: Yes Search Rights in CDI: Free Full Text Rights in CDI: Subscription (Title Level) Full Text Linking in CDI: Linkresolver	Orders: 1	Portfolio List (175) Edit Collection ...	Collection ID: 61146626060004301 MMS ID: 9990008925504301 Type: Selective package Services: Full Text (Available from: 08/02/2022) Provider coverage: Yes CDI Type: Full Text Collection CDI Collection ID (DB ID): SES

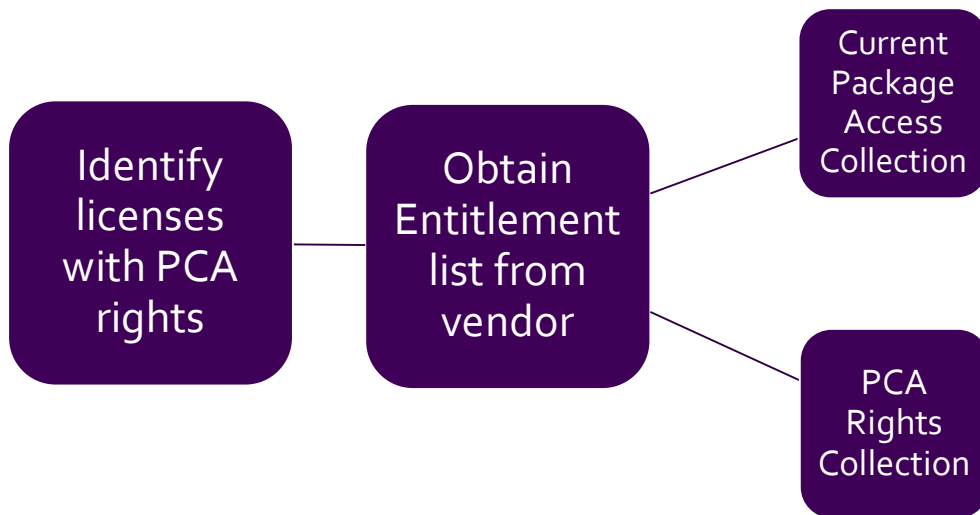
Perpetual Access coverage is different from Current coverage in most cases, so its important to be able to differentiate the two when making decisions, and also to be able to act on the difference quickly.

So just a reminder of how it usually works:

- Current access is our subscribed material PLUS all of the additional back content thrown in by the vendor.
- Perpetual access is solely the materials that we licensed as part of our collection development process.

You'll notice that the PCA collection shown contains substantially fewer titles than the current collection, but those are only the titles that we would retain in the event we have to cancel this package.

Project Overview



<https://link.mnsu.edu/charleston23>

Annalis will cover the Alma process in more detail next, but generally we are:

- 1) Identifying which licenses provide for permanent access of materials,
- 2) Obtaining entitlement lists from those vendor, and
- 3) Creating and activating two collections:
 - 1) a Current Package Access Collection (all materials that are available during the licensed period)
 - 2) PCA Rights Collection (which are those permanently licensed materials)

Benefits of creating these two collections

- Maintain collection awareness
- Identify long-term resources
- Workflow benefits
- Also useful for their contribution to reports

There are multiple benefits to setting up both of these collections in Alma:

1. Maintain collection awareness
 1. Just knowing about the existence of PCA rights isn't enough to be useful. It's kind of like knowing that your job offers some great fringe benefits but not visiting that HR website to actually find out what is available during your employment.
2. Identify long-term resources
 1. As the movement around Open Educational Resources (OER) hopefully grows & more instructors adopt these practices, the library is in a great position to be a part of this. Teaching faculty (or probably the librarian assisting with this) would be able to confidently select course readings by choosing materials out of the PCA Rights Collection. This would lessen potential stress or confusion when a syllabus links to not currently licensed content.
3. Workflow benefits
 1. If you are going to utilize PCA collections in your institution (especially after a cancellation – which often happens at a bad time of the year for many of us - either in the middle of summer or in-between semesters), we see a benefit to creating these collections at the beginning of the collection's lifecycle and then the on-going management is a smaller aspect of the project.
4. Also useful for their contribution to reports
 1. These PCA rights collections contribute to our ability to analyze our collection as a whole, which is something Nat will cover more a little later.

Example PCA Rights

Perpetual Access Right	Yes
Perpetual Access note	2.5. Where stated in the Commercial Terms, Publisher shall provide access in perpetuity for Authorised Users to Licensed Materials (for Products purchased on a subscription basis, this is in respect of the Product's content published and paid for during the relevant Subscription Period). Access in perpetuity will be provided either through the Secure Network or from the archive described in clause 6.2. If no right of access in perpetuity is granted, the Licensee's right to access the Licensed Materials will terminate at the end of the
Perpetual Access Right	Yes
Perpetual Access note	See Annex 2 for full details: "The Customer will be entitled to perpetual access on the same terms as this Agreement to the portion(s) of the Journals that were published for the first time during the Subscription Period, provided that the Customer shall pay any relevant Hosting Fees following the procedure set out in Clauses 4(a)-(d) of this Annex."

PCA Rights come in several different forms, and I just wanted to include a few examples of the way we track these within Alma.

Sometimes licenses technically include some kind of PCA rights (such as providing a cd rom of info that we have no way of hosting or indexing) but we value the materials that continue to be provided through a vendor platform for a minimal hosting fee.

Example PCA Rights

Perpetual Access Right	Yes
Perpetual Access note	3. Archiving. MIT Press will make all reasonable efforts to ensure continuing access to any given Issue of any Journal for a minimum of 10 years.
Perpetual Access Right	Yes
Perpetual Access note	<p>9.5.1 continue to provide access to the <u>Backfiles</u> either via the Online Services or by way of the online services of a third party provider; or</p> <p>9.5.2 provide or arrange for a third party to provide the Licensee with a copy of the <u>Backfiles</u> in such digital or electronic format as Publisher or such third party sees fit subject always to the right of the Publisher to withdraw from the Licensee any such access to any such <u>Backfiles</u> in the event that for any reason the Publisher ceases to have the right to grant such access, and subject further to the right of the Publisher or any relevant third party provider to apply additional terms and conditions on such access including requiring the licensee to bear any charges reasonably incurred by the Publisher or such third party in continuing to provide such access. The Licensee must ensure it and any <u>Authorised</u> User continues to comply at all times with the permitted use and restrictions set out herein. For the avoidance of doubt the Publisher shall have no obligation to provide an electronic copy or maintain the Online Services in relation (i) to any licensed Content or (ii)</p>

These rights can range from simple one sentence clauses, to more complex multi-paragraph explanations.

Ending a license

Online Access Options

Full text availability

Elsevier PCA Rights Collection Available from 01/01/1993 volume: 18 issue: 6.	SHOW LICENSE	🔗
ScienceDirect Freedom Collection 2023 Available from 1995 volume: 21 issue: 1.	SHOW LICENSE	🔗

Doing the front work of maintaining these PCA collection is worthwhile because there is enough work to do when ending a license (like outreach to affected departments). It also makes is a pretty simple thing to make Alma reflect any of these cancellations. Say our institution decided to end the package at the end of 2023.

- 1) We would just 'cap' the coverage in the PCA collection (and Annalis will talk a little bit more about the mechanics of editing these collections)
- 2) And then we just delete the "current" collection.

Thank you for your time, up next is our colleague Annalis, who will be able to provide more detail on the actual Alma mechanics of this project.

PROCESS AND PROCEDURE

Charleston, 2023
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Let's discuss process and procedure. First and foremost, it's important to recognize that this process can differ based on your library management system and library needs. For the sake of clarity, I want to be clear that this is how we do this process as an institution that uses Alma as our L.M.S.

Acquire an Entitlement List from the Vendor

- Pull from an administration account
- Contact vendor
 - **NOTE:** Entitlement reports can vary from vendor to vendor. Be sure to familiarize yourself with individual reports as needed.
- Compile PCA titles into an upload-able spreadsheet.
 - Alma needs a specific template. A copy of that template can be found here: <https://knowledge.exlibrisgroup.com/@api/deki/files/108723/Portfolio Loader Template August 2019.xlsx?revision=1>
 - At minimum, you MUST include an ISSN or ISBN as this is what is used to match a title to the Community Zone. Strongly consider adding additional information such as coverage.

	A	B	C	M	N	O	
1	LOCALIZED	ISSN	ISSN	TITLE	FROM_YEAR	TO_YEAR	FROM
2	Y	0148-9267	1531-5169	Computer music journal [electronic resource]	1997		
3	Y	0001-9933	1937-2108	African arts = Arts d'Afrique.	2003	2020	
4	Y	0028-4866	1937-2213	The New England quarterly.	2006	2020	
5	Y	1054-2043	1531-4715	TDR.	1998		
6	Y	0034-6535	1530-9142	The review of economics and statistics.	1998		
7	Y	0011-5266	1548-6192	Daedalus.	2003	2020	
8	Y	0022-1953	1530-9169	The journal of interdisciplinary history.	1997		
9							

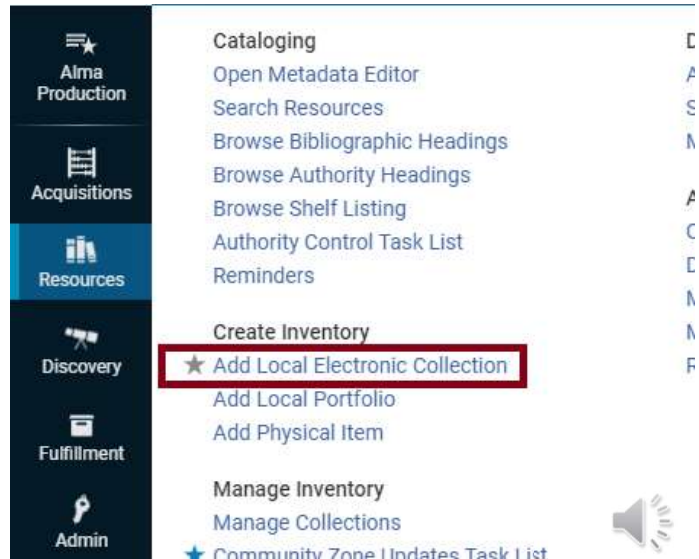


To start, I recommend pulling an entitlement report for the vendor that you are working with. We will typically pull these reports from our administration accounts but do know you can always reach out to the vendor directly. Once you obtain this list, take some time to familiarize yourself with the report. Some vendors will include open-access titles and it's a good idea to filter those out so they do not end up in your PCA collection.

If you are working with a large amount of titles, I recommend setting up a list you can upload into Alma using the blank template found on Ex Libris's website. You can find a link to this template through the "Manage Electronic Resources" documentation here.

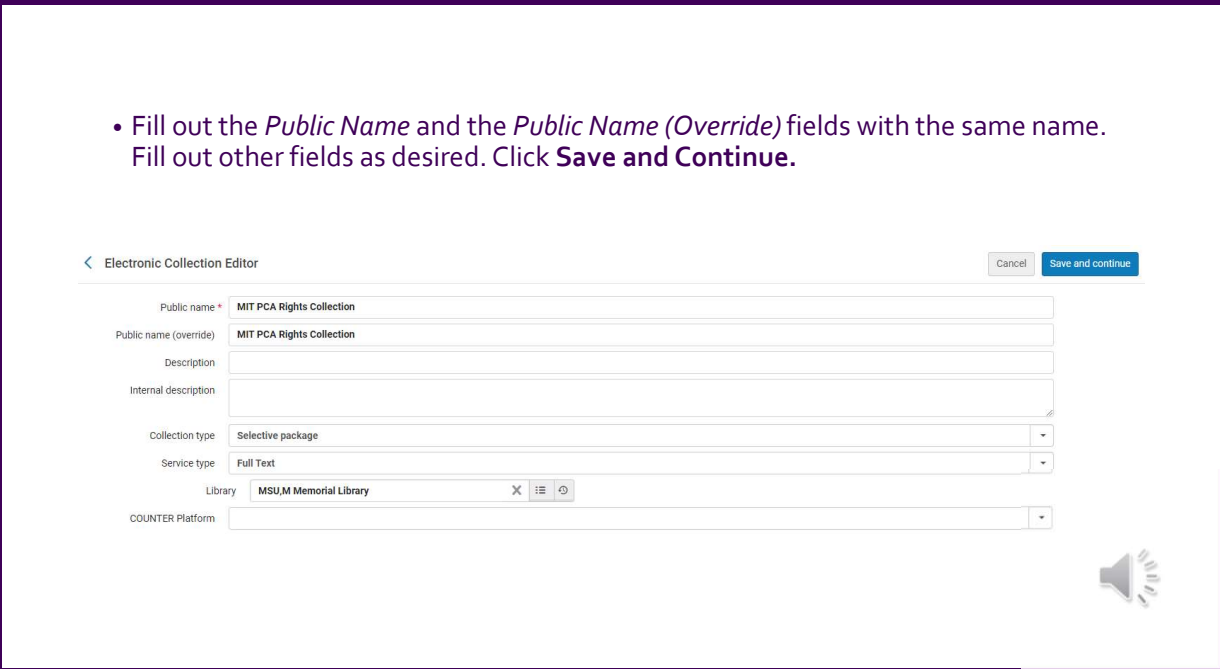
If you are working with a small amount of titles, you may wish to activate the titles individually. We usually work with a large amount of titles and therefore choose to use the portfolio uploader feature. You can see an example of what that file could look like here. In this case, I have the ISSN along with the journal-title and coverage. Notice columns D-L are hidden – these fields are all blank.

- Under *Resources*, select **Add Local Electronic Collection** under *Create Inventory*.



There are many ways you could approach this process. I have done this process a few different ways myself but this is the main way I have done it. To start, we are going to create a local collection. Under the Resources menu and under Create Inventory, go ahead and click on Add Local Electronic Collection.

- Fill out the *Public Name* and the *Public Name (Override)* fields with the same name. Fill out other fields as desired. Click **Save and Continue**.



The screenshot shows the 'Electronic Collection Editor' interface. At the top left is a back arrow and the title 'Electronic Collection Editor'. At the top right are 'Cancel' and 'Save and continue' buttons. The form contains the following fields:

- Public name *: MIT PCA Rights Collection
- Public name (override): MIT PCA Rights Collection
- Description: (empty text area)
- Internal description: (empty text area)
- Collection type: Selective package (dropdown menu)
- Service type: Full Text (dropdown menu)
- Library: MSU, M Memorial Library (with search, list, and refresh icons)
- COUNTER Platform: (empty dropdown menu)

A speaker icon is located in the bottom right corner of the form area.

Alma will walk you through the local collection set-up wizard. At minimum, fill out the public name and public name override fields with the same name. The override field is particularly important for later when we link this collection to the Community Zone. If you do not fill out the Public Name Override field, the local collection's name will change to the name of the Community Zone collection that you link this collection to later. Once you have this first page filled out, click Save and Continue.

- Leave *Service Activation Status* for the collection as **Not Available** until you are ready to make it available for access.
- Adjust other settings in the collection as needed for your library's needs.
- Click the **Portfolios** tab and select **Load Portfolios**.

The image contains two screenshots of the 'Electronic Service Editor' interface. The top screenshot shows the 'Activation' tab. Under 'Service activation status', the 'Not Available' radio button is selected. Below this, there are fields for 'Active from date', 'Active until date', and 'Display service temporarily unavailable message' (with 'No' selected). The bottom screenshot shows the 'Portfolios' tab. A red box highlights the 'Load Portfolios' button in the top right corner of the main content area. The interface also shows a search bar, filters for 'Status', 'CZ Linking', and 'COUNTER Platform', and a message 'No records were found.' with a speaker icon.

You will now be on the Electronic Service Editor page. On the activation tab, leave the service activation status as not available for now. This will help ensure that the collection won't show up in your discovery layer until it is ready for access.

Be sure to take the time to adjust any other settings in the collection as needed for your library's needs. For example, you may wish to visit the linking tab to enable and select your proxy.

Next, go to the portfolios tab and click on load portfolios. The initial set-up we've done with the entitlement list will now be useful.

- Fill out the Activation Wizard screen. Be sure to select the correct settings for what you are trying to accomplish. Click **Next**.

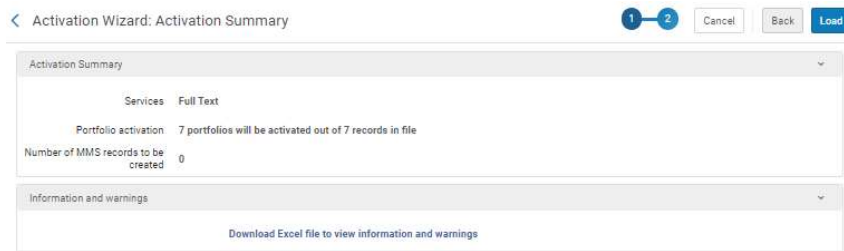
See [Using Portfolio Loader for Adding, Updating or Removing Portfolio Information in Bulk](#) for more information.

Additional information uploading KBART files: [https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/KBART E-resource activations](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/KBART_E-resource_activations)

You should now be on the activation wizard page for file uploads. At this point in the set-up of a PCA collection, the loading policy does not make much of a difference. It will, however, make a difference once the collection is associated with the Community Zone. We follow Ex Libris’s documentation for file uploads. In most cases, you will want to have Complete selected as this will work on linking your titles to the Community Zone after the collection has been properly associated. Be sure to have “Add Local Portfolios” selected under action. I will always leave ‘validate online’ selected under select validation policy as this will help provide clarity if any of the titles in the file are not uploaded.

I want to take a second to point out that you can now upload KBART files into Alma. I won’t go into that process here but please know you can find documentation about how to do this on Ex Libris’s website if you are curious.

- The next screen in the Activation Wizard will let you know what is going to happen with the titles in your file for upload. Click **Load**.



- You will now see a note letting you know that your file has been submitted as a job. Once the job is completed, you'll see a list of portfolios under the *Portfolios* tab. You may need to refresh your screen.



On the next step of the activation wizard, Alma will let you know what is going to happen with the information you've provided for upload. In this case, we can see Alma is going to create all seven portfolios from the information provided in the Excel spreadsheet. Sometimes, you'll find that Alma won't create a portfolio for a title in your Excel document for some various reason. If this happens to you, you'll see differing numbers. This is where downloading the Excel file to view information and warnings is helpful. Even if you get differing numbers, you will still want to upload the file and use the Information and Downloads file to manually add any problem titles to your collection. Once you've verified everything looks good as it will be, go ahead and click load.

Alma will let you know with a pop-up that the activation job has been submitted.

- Example of portfolios listed after the file upload process has finished. Click **Save**.

Electronic Service Editor Cancel Save


Activation Service Description Linking **Portfolios** Notes History

1 - 7 of 7 ISBN -

Move Set of Portfolios Activate/Deactivate - Load Portfolios Add - Delete Selected

Status: All - CZ Linking: All - COUNTER Platform: All -

	Availability	Identifier	Title	Coverage	Material Type	MMS ID	
1	<input type="checkbox"/>	0001-9933	African arts = Arts d'Afrique.	Available from 2003 until 2020.	-	9989748205404...	<input type="button" value="..."/>
2	<input type="checkbox"/>	0148-9267	Computer music journal [electronic resource]	Available from 1997.	-	9989748136604...	<input type="button" value="..."/>
3	<input type="checkbox"/>	0011-5266	Daedalus.	Available from 2003 until 2020.	-	9989753207804...	<input type="button" value="..."/>
4	<input type="checkbox"/>	0022-1953	The journal of interdisciplinary history.	Available from 1997.	-	9989748228304...	<input type="button" value="..."/>
5	<input type="checkbox"/>	0028-4866	The New England quarterly.	Available from 2006 until 2020.	-	9989749772804...	<input type="button" value="..."/>
6	<input type="checkbox"/>	0034-6535	The review of economics and statistics.	Available from 1998.	-	9989748464304...	<input type="button" value="..."/>
7	<input type="checkbox"/>	1054-2043	TDR.	Available from 1998.	-	9989749778204...	<input type="button" value="..."/>



Once the activation job has finished loading, you will be notified through email. Once you refresh the Electronic Service Editor, you will see a list of all the portfolios you added. Notice that all titles are Institution Zone records at this time. At this point, go ahead and click on Save.

The screenshot shows the 'Electronic Collection Editor' interface. The 'General' tab is selected, displaying various configuration fields. The 'Proxy enabled' field is set to 'No'. The 'Services' table at the bottom contains the following data:

Availability	Service type	Number of Portfolios	Active Portfolios	Active from date	Active until date
1	Full Text	7	7	-	-

- You should now be on the Electronic Collection Editor. Adjust any settings as needed based on your library needs and click on **Save**.



After clicking save, you will be brought to the Electronic Collection Editor. The Electronic Collection Editor is another area where you'll need to adjust settings based on your library needs. We usually take the opportunity to adjust proxy settings as needed.

On the General tab in this section, you may find it useful to mark the access type as perpetual. This can be a helpful indication later-on if you run reports. Go ahead and click Save.

Identifying a Collection to Link To from the Community Zone

Tips for identifying an ideal collection:

- Make sure the Interface Name matches the name of the vendor that you are working with.
- Stay away from CZ collections that were designed for specific packages. You want a collection that is all-encompassing of what a vendor provides for either journal or book content.
Example: *MIT Press Journals Arts and Humanities* won't include all journals provided by the vendor from other subject areas.
- Ideal collections sometimes use such words like 'All' or 'Complete' in them. Sometimes they are simply the vendor name with words like 'Journals'. Example: **MIT Press Journals**.
- Make sure the collection has portfolios available as this is what your local collection will activate for access. You can always look at a collection's available portfolio list before deciding on it.



Next, take the time to identify a collection from the Community Zone that you can link your newly created local electronic collection to. The benefit of doing this is for the CZ to manage linking for you and to generally make your life easier.

Since identifying ideal collections can be tricky, I wanted to take the opportunity to provide some tips and tricks for identifying an ideal collection.

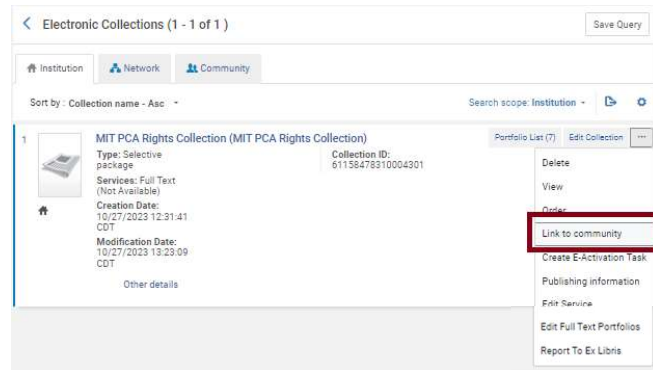
Be sure the collection's interface name matches the vendor you are working with. Stay away from collections that were designed for specific packages as you want a collection that is all-encompassing of a vendor's provided content. For example, MIT Press Journals Art and Humanities collection will not include other journals that fall outside of the arts and humanities subject area. Ideal collections sometimes include such words as 'all' or 'complete'. Sometimes, vendors simply use their vendor name and the words 'journals' or 'books'. With the collection we are working with today, we have MIT Press Journals, for example. Some vendors will even split book and journal content into separate collections. This is ok but be sure you are working with the desired collection.

Finally, be sure you choose a collection that has portfolios in it as this is what your local electronic collection will utilize for access. Be sure to write this collection name down for later.

Linking to the Community Zone

- Find your newly created collection. Under the ellipses, click on **Link to Community**.

You can find your locally created collection by performing an Electronic Collection/Electronic Collection search in Alma.



Now that we've taken the time to identify a collection from the Community Zone, we are ready to link the local electronic collection. Under the ellipses of your local electronic collection, go ahead and select Link to Community.

- Under *Community Information*, click on **Select from a List**.

< Link Electronic Resources To Community Cancel Link

Local Information

Service type: Full Text

Total number of portfolios: 7

Number of local portfolios: 7

Community Information

Electronic collection name: **Select from a list**

Type: -


Interface name: -

Service type: -

Bibliographic Records Configuration

Match routine: By ISBN/ISSN Identifier

Use the community bibliographic records: No Yes



Under the community information section, go ahead and click on 'select from a list'.

The screenshot shows a web interface titled "Electronic Collections". At the top, there is a search bar with the text "Electronic Collection Name - 'MIT Press Journals'". Below the search bar, there are two search results. The first result is "IEEE Xplore MIT Press Journals Library: Computing & Engineering Collection". The second result is "MIT Press Journals". A red arrow points from the search bar to the second result. The interface includes a search bar, a list of results, and a speaker icon in the bottom right corner.

- In the pop-up, search for the name of the CZ collection you identified earlier and select it by simply clicking on it.

In the pop-up, type in the name of the collection you've identified earlier in the search box. Through the list of results, find that collection and click on it in order to select it.

- Make sure **Yes** is selected under *Bibliographic Records Configuration*. Click **Link**.

Link Electronic Resources To Community

Cancel Link

Local Information

Service type: Full Text

Total number of portfolios: 7

Number of local portfolios: 7

Community Information

Electronic collection name: MIT Press Journals

Type: Selective package

Interface name: Mit_Press

Service type: Full Text

Bibliographic Records Configuration

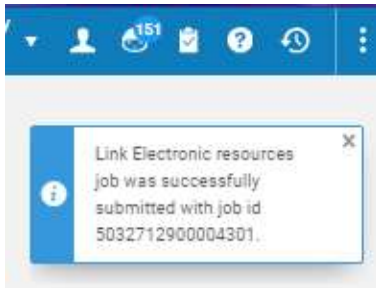
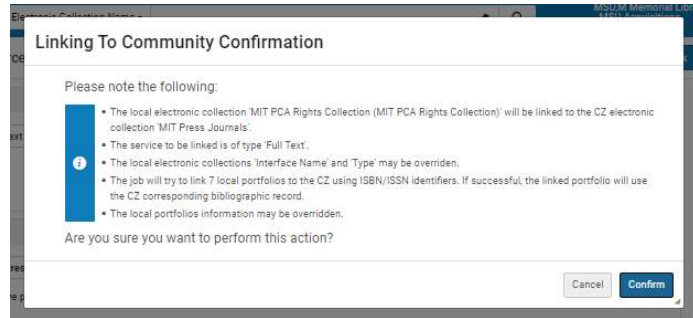
Match routine: By ISBN/ISSN Identifier

Use the community bibliographic records: No Yes

Under bibliographic records configuration, be sure you have 'yes' selected. I recognize ISSN's are not always an ideal match-point but this is what Ex Libris uses to make the connection from your file you uploaded earlier to the Community Zone. The records in the CZ are pretty inclusive of a title's ISSN's and therefore there is a high chance the appropriate connections will be made in the linking process.

Once you have everything set up, go ahead and click on Link.

- Read through the pop-up and click **Confirm**.



You will see a pop-up confirming you've successfully submitted a linking job.



After clicking 'link', you get the pop-up that you see in the upper right-hand corner. This pop-up is simply letting you know what to expect. Go ahead and read through this pop-up and click confirm. You will then see another pop-up letting you know you've successfully submitted a linking job. This process will take a little bit of time but you should receive an email once the process is complete.

- Once successfully linked to the Community Zone, you'll see the CZ symbol appear in place of the Institution Zone symbol.

Electronic Service Editor

Cancel Save


Activation Service Description Linking Portfolios Notes History

1 - 7 of 7 ISBN +

Move Set of Portfolios Activate/Deactivate Load Portfolios Add Delete Selected

Status: All CZ Linking: All COUNTER Platform: All

	Availability	Identifier	Title	Coverage	Material Type	MMS ID
1		0001-9933	African arts = Arts d'Afrique.	Available from 2003 until 2020.	JOURNAL	9989748205404...
2		0148-9267	Computer music journal [electronic resource]	Available from 1997.	JOURNAL	9989748136604...
3		0011-5266	Daedalus.	Available from 2003 until 2020.	JOURNAL	9989753207804...
4		0022-1933	The journal of interdisciplinary history.	Available from 1997.	JOURNAL	9989748228304...
5		0028-4866	The New England quarterly.	Available from 2006 until 2020.	JOURNAL	9989749772804...
6		0034-6335	The review of economics and statistics.	Available from 1998.	JOURNAL	9989748464304...
7		1054-2043	TDR.	Available from 1998.	JOURNAL	9989749778204...



On the portfolios tab in the electronic service editor, you'll notice the Institution Zone symbol has changed to the Community Zone symbol. You may need to refresh this page after the linking job has completed to see this. Take this time to look for any titles that retain the Institution Zone symbol. And manually investigate those titles. By investigating, I mean you'll likely have to manually activate them from the Community Zone. When a title doesn't connect, it either does not exist in the CZ or the CZ record does not have the ISSN you entered in the file for upload. Go ahead and activate any missed titles from the CZ and remove the local portfolio. Be sure the coverage from those titles reflects your PCA coverage by editing the portfolio if necessary. For any titles that have to remain local, be sure you add an access URL in the portfolio for your patrons.

- Remember to change the status of your new PCA Rights Collection to *Available* under the *Activation* tab when complete. Click **Save**.

The screenshot shows the 'Electronic Service Editor' interface. At the top right, there are 'Cancel' and 'Save' buttons. Below the title bar is a navigation menu with tabs for 'Activation', 'Service Description', 'Linking', 'Portfolios', 'Notes', and 'History'. The 'Activation' tab is selected and highlighted with a red box. Inside this tab, the 'Service activation status' is set to 'Available' (indicated by a selected radio button). Other options include 'Not Available', 'Activate new portfolios associated with service automatically?' (with 'No' and 'Yes' radio buttons), 'Active from date' (with a date picker), 'Active until date' (with a date picker), 'Display service temporarily unavailable message' (with 'No' and 'Yes' radio buttons), 'Display unavailable message from date' (with a date picker), 'Display unavailable message until date' (with a date picker), and 'Service unavailability display message' (with a text input field). A speaker icon is visible in the bottom right corner of the interface.

Finally, you will need to remember to change the status of your new PCA Rights Collection to available. Go to the activation tab and select available. Go ahead and click on Save. These titles will now be available to your patrons through your discovery layer.

PCA Collections for Holdings Analysis

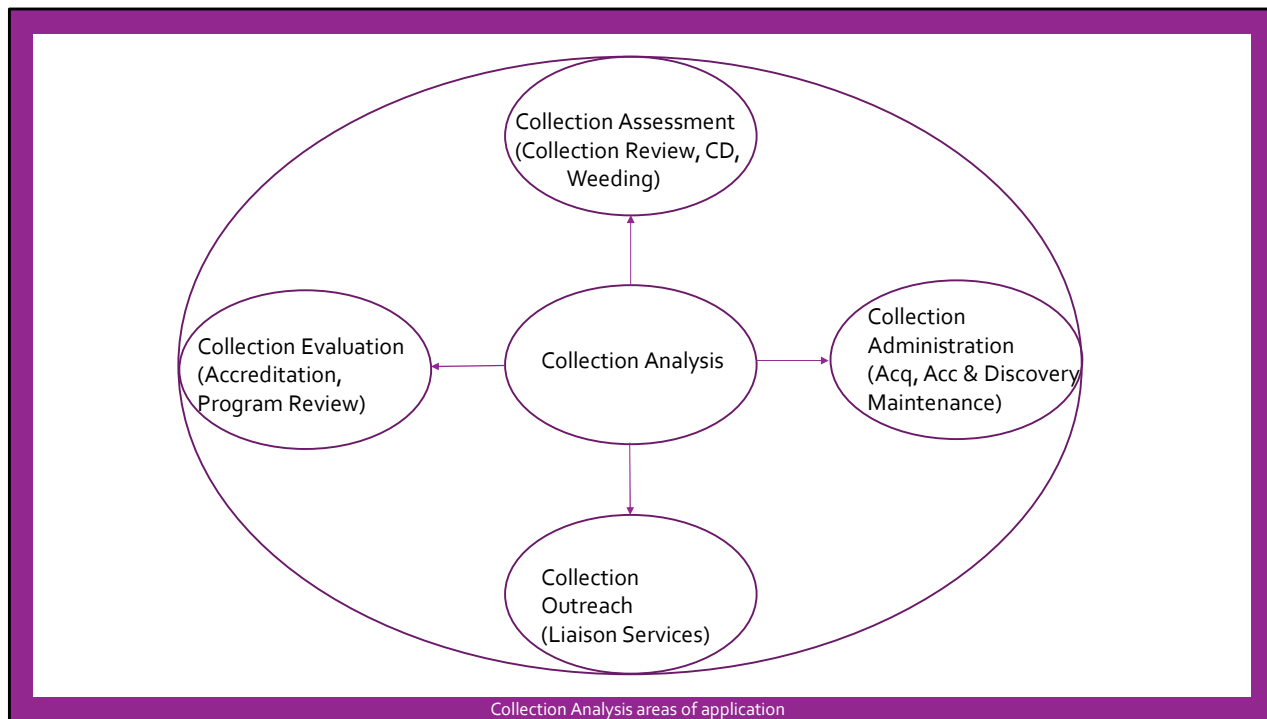
At MNSU, our PCA collections provide rich data for holdings analysis, which I'll demonstrate briefly. Our approach to holdings analysis is based on the foundational work of Evan Rusch here at MNSU.

Collection Analysis Categories

1. Supply ← Holdings Analysis
2. Quality
3. Usage
4. Cost

Collection Analysis categories of data

Holdings analysis is one aspect of collection analysis. Generally speaking, we think of collection analysis data and measures in terms of 4 categories – (1) Supply, which includes holdings analysis, (2) Quality, which includes journal rankings and citation-based metrics, (3) Usage, which includes numerous measures, such as COUNTER item requests, link resolver clicked services, ILL requests, and print serials browses, and finally, (4) Cost.



In our library, collection analysis has at least 4 areas of application. These include (1) Collection Assessment, or decision-making about the collections, (2) Collection Evaluation, for example, to support accreditation and program review, (3) Collection Administration, such as discovery optimization, and (4) Collection Outreach, which includes reports to campus dept and administrators demonstrating the library's value.

Example Reports

1. Collection Review (CR) report
2. Index Comparison
3. Collections Power BI (CPBI)

Collection Analysis example reports

Today, I'll show you 3 reports very quickly to highlight how these deploy holdings analysis, especially to draw attention to the value provided by PCA collections. The Collection Review (CR) report is an annual report to inform collection assessment. The Index Comparison was a custom report requested by an instruction librarian. Finally, the Collections Power BI (CPBI) is an online, interactive report we update annually. Although the CPBI was built primarily for collection outreach and evaluation, it's helpful across all the collection analysis areas of application.

(For the video, I provide brief, 'live' demonstrations of these reports next, but I have provided screenshots for these slides, with my notes, in case anybody wants to read my notes at their own pace.)

CRID	Title	ISSN1	ISSN2	2022 Status	2023 Core Price	2023 Nominal Price	2023 Distributed Price	2023 Comparative Price	Price Comment	Active	OA_Status	OA_Code	Version	Vendor	Collection Type
67	2630 Teaching and Learning in Nursing	1557-3687	NULL	Active	\$ 244.33	\$ 335.00	\$ 21.58	\$ 16.66		1	Hybrid		1	AY23.CY22 Elsevier	Core
68	2631 Teaching and Teacher Education	0742-051X	NULL	Active	\$ 2,879.50	\$ 3,948.00	\$ 254.34	\$ 195.36		1	Hybrid		1	AY23.CY22 Elsevier	Core
69	2632 The American Journal of Cardiology	0002-9149	NULL	Active	\$ 1,587.81	\$ 2,177.00	\$ 140.25	\$ 108.27		1	Hybrid		1	AY23.CY22 Elsevier	Core
70	2633 The American Journal of Medicine	0002-9343	NULL	Active	\$ 1,315.03	\$ 1,803.00	\$ 116.16	\$ 89.67		1	Hybrid		1	AY23.CY22 Elsevier	Core
71	2634 The American Journal of Surgery	0002-9610	NULL	Active	\$ 1,313.57	\$ 1,801.00	\$ 116.03	\$ 89.57		1	Hybrid		1	AY23.CY22 Elsevier	Core
72	2635 The Arts in Psychotherapy	0197-4556	NULL	Active, Form	\$ 1,330.36	\$ 1,824.00	\$ 117.51	\$ 90.72		1	Hybrid		1	AY23.CY22 Elsevier	Core
73	2636 The Internet and Higher Education	1096-7516	NULL	Active	\$ 615.58	\$ 844.00	\$ 54.37	\$ 41.98		1	Hybrid		1	AY23.CY22 Elsevier	Core
74	2637 The Journal for Nurse Practitioners	1555-4155	NULL	Active	\$ 403.33	\$ -	\$ 25.98	\$ 20.06	Print Price 0	1	Hybrid		1	AY23.CY22 Elsevier	Core
75	2638 The Journal of Academic Librarianship	0099-1333	NULL	Active	\$ 833.66	\$ 1,143.00	\$ 73.64	\$ 56.85		1	Hybrid		1	AY23.CY22 Elsevier	Core
76	2639 The Journal of Pediatrics	0022-3476	NULL	Active	\$ 2,226.73	\$ 3,053.00	\$ 196.68	\$ 151.84		1	Hybrid		1	AY23.CY22 Elsevier	Core
77	2640 The Lancet	0140-6736	NULL	Active	\$ 2,270.49	\$ 3,113.00	\$ 200.55	\$ 154.83		1	Hybrid		1	AY23.CY22 Elsevier	Core
78	2641 The Lancet (North American Edition)	0099-5355	NULL	Active	\$ 1,857.59	\$ 1,957.59	\$ 126.11	\$ 97.36		1	Unknown		9	AY23.CY22 Elsevier	Core
79	2642 The Leadership Quarterly	1048-9843	NULL	Active	\$ 936.49	\$ 1,284.00	\$ 82.72	\$ 63.86		1	Hybrid		1	AY23.CY22 Elsevier	Core
80	2643 Value in Health	1098-3015	NULL	Active	\$ 1,279.29	\$ 1,754.00	\$ 113.00	\$ 87.24		1	Hybrid		1	AY23.CY22 Elsevier	Core
81	2644 Women's Health Issues	1049-3867	NULL	Active	\$ 460.22	\$ 631.00	\$ 40.65	\$ 31.38		1	Hybrid		1	AY23.CY22 Elsevier	Core
82	2645 Women's Studies International Forum	0277-5395	NULL	Active, Form	\$ 1,155.30	\$ 1,584.00	\$ 102.05	\$ 78.78		1	Hybrid		1	AY23.CY22 Elsevier	Core
83	2646 ACC Current Journal Review	1062-1458	NULL	Discontinued, Title no l	\$ -	\$ -	\$ -	\$ -	Not on print price	0			99	AY23.CY22 Elsevier	FreedomC
84	2647 Accident Analysis & Prevention	0001-4575	NULL	Active	\$ 5,342.00	\$ -	\$ 344.15	\$ 265.69		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
85	2648 Accident and Emergency Nursing	0965-2302	NULL	Changed Name, Continu	\$ 914.00	\$ -	\$ 58.88	\$ 45.46		1	Hybrid		99	AY23.CY22 Elsevier	FreedomC
86	2649 Accounting Forum	0155-9982	NULL	Transferred, Title transf	\$ -	\$ -	\$ -	\$ -	Not on print price	0			99	AY23.CY22 Elsevier	FreedomC
87	2650 Accounting, Management and Information Te	0959-8022	NULL	Changed Name, Continu	\$ 1,118.00	\$ -	\$ 72.03	\$ 55.60		1	Hybrid		99	AY23.CY22 Elsevier	FreedomC
88	2651 Accounting, Organizations and Society	0361-3682	NULL	Active	\$ 2,347.00	\$ -	\$ 189.86	\$ 146.57		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
89	2652 Acta Astronautica	0094-5765	NULL	Active	\$ 8,063.00	\$ -	\$ 519.44	\$ 401.02		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
90	2653 Acta Biomaterialia	1742-7061	NULL	Active	\$ 2,166.00	\$ -	\$ 139.54	\$ 107.73		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
91	2654 Acta Ecologica Sinica	1872-2032	NULL	Active	\$ -	\$ -	\$ -	\$ -	Print Price 0	1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
92	2655 Acta Genetica Sinica	0379-4172	NULL	Changed Name, Continu	\$ 1,550.00	\$ -	\$ 99.86	\$ 77.09		0			99	AY23.CY22 Elsevier	FreedomC
93	2656 Acta Histochemica	0065-1281	NULL	Active	\$ 1,979.00	\$ -	\$ 127.49	\$ 98.43		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
94	2657 Acta Materialia	1359-6454	NULL	Active, Formerly part of	\$ 6,418.00	\$ -	\$ 413.47	\$ 319.20		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC
95	2658 Acta Mathematica Scientia	0252-9602	NULL	Transferred, Transferrec	\$ -	\$ -	\$ -	\$ -	Not on print price	0			99	AY23.CY22 Elsevier	FreedomC
96	2659 Acta Mechanica Solida Sinica	0894-9166	NULL	Transferred, Transferrec	\$ -	\$ -	\$ -	\$ -	Not on print price	0			99	AY23.CY22 Elsevier	FreedomC
97	2660 Acta Metallurgica et Materialia	0956-7151	NULL	Changed Name, Former	\$ 6,418.00	\$ -	\$ 413.47	\$ 319.20		0			99	AY23.CY22 Elsevier	FreedomC
98	2661 Acta Oecologica	1146-609X	NULL	Active	\$ 1,461.00	\$ -	\$ 94.12	\$ 72.66		1	Hybrid		1	AY23.CY22 Elsevier	FreedomC

The Collection Review report, or CR, is what we call a “base report.” Base reports are typically used as the basis for other reports we often call Finished Reports. The CR includes all the individual journals included in packages or subscribed individually by our library. The number of data variables is very large, but we usually only draw on a dozen or so for any given Finished Report.

CRID	Distinct ER Venues	Distinct ER Providers	OA Venues	ELM Venues	ER Sub Start	ER Sub End	ER Sub Gap	ER NonSub Earliest Start	ER NonSub Latest End	ER NonSub Gap	ER Agg Earliest Start	ER Agg Latest End	ER Agg Gap	ER ELM Earliest Start	ER ELM Latest End	ER ELM Gap	ER OA Earliest Start	ER OA Latest End	ER OA Gap	ER PCA Earliest Start	ER PCA Latest End	ER PCA Gap	PrintSer Start	PrintSer End	
267	4	3	0	2	2018	2023	0	2018	2021	0	2018	2021	0	2018	2021	0	0	0	0	0	2018	2020	0	0	0
268	3	3	0	0	2009	2023	0	2009	2020	0	2009	2019	0	0	0	0	0	0	0	0	2009	2020	0	0	0
269	3	3	0	0	2009	2023	0	2009	2020	0	2009	2019	0	0	0	0	0	0	0	0	2009	2020	0	0	0
270	1	1	0	0	2019	2023	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
271	5	4	0	2	1999	2023	0	1969	2021	0	1969	2021	0	1969	2021	0	0	0	0	0	1969	2020	0	0	0
272	3	3	0	0	2009	2023	0	2009	2020	0	2009	2019	0	0	0	0	0	0	0	0	2009	2020	0	0	0
273	3	3	0	0	2009	2023	0	2009	2020	0	2009	2019	0	0	0	0	0	0	0	0	2009	2020	0	0	0
274	5	4	0	2	1999	2023	0	1911	2021	0	1911	2021	0	1911	2021	0	0	0	0	0	1911	2020	0	0	0
275	6	4	1	2	1987	2023	0	1987	2023	1	1987	2023	0	1987	2023	0	2017	2023	0	1987	2016	1	0	0	
276	2	2	0	0	2000	2023	0	1927	2018	0	0	0	0	0	0	0	0	0	0	0	1927	2018	0	0	0
277	1	1	0	0	1974	2021	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1990	2015	
278	2	2	0	0	2003	2023	0	1897	2017	0	0	0	0	0	0	0	0	0	0	0	1897	2017	0	0	0
279	3	3	0	0	2003	2023	1	1979	2022	0	1996	2022	0	0	0	0	0	0	0	0	1979	2017	0	0	0
280	1	1	0	0	2008	2023	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2012	2020	
281	1	1	0	0	0	0	0	1895	2017	0	0	0	0	0	0	0	0	0	0	0	1895	2017	0	0	0
282	2	2	0	0	2009	2023	0	2012	2023	0	2012	2023	0	0	0	0	0	0	0	0	0	0	1987	2015	
283	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
284	2	2	0	0	1993	2023	0	2002	2006	0	2002	2006	0	0	0	0	0	0	0	0	0	0	1970	2013	
285	1	1	0	0	0	0	0	1863	2023	0	1863	2023	0	0	0	0	0	0	0	0	0	0	1901	2023	
286	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
287	4	3	0	2	1996	2023	0	1996	2005	0	1996	2005	0	1996	2005	0	0	0	0	0	0	0	0	0	0
288	6	4	0	4	1996	2023	0	1950	2005	0	1950	2005	0	1950	2005	0	0	0	0	0	0	0	0	0	0
289	7	4	0	3	1996	2023	0	1975	2017	0	1990	2005	0	1990	2005	0	0	0	0	0	1975	2017	0	0	0
290	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
291	3	3	0	1	0	0	0	1952	2023	0	1997	2023	0	2022	2023	0	0	0	0	0	1952	2020	0	2018	2024
292	3	3	0	1	0	0	0	1952	2023	0	1997	2023	0	2022	2023	0	0	0	0	0	1952	2020	0	2018	2024
293	5	1	0	4	0	0	0	1995	2023	0	1995	2023	0	2008	2023	0	0	0	0	0	0	0	0	1969	2023
294	6	2	0	4	0	0	0	2002	2023	0	2002	2023	0	2002	2023	0	0	0	0	0	0	0	0	1960	2023
295	2	2	0	1	2002	2023	0	1993	2022	0	1993	2022	0	1993	2022	0	0	0	0	0	0	0	0	1982	2023
296	1	1	0	0	2019	2023	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1986	2022
297	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
298	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1960	2024
299	8	3	1	6	0	0	0	1973	2023	0	1990	2023	0	1990	2023	0	1973	2009	0	0	0	0	0	1982	2022
300	2	2	0	1	0	0	0	1922	2023	0	2017	2023	0	2017	2023	0	0	0	0	0	0	0	0	1948	2023

Collection Review report (CR)

The CR includes several holdings analysis categories. Aside from providing counts of ER providers, OA venues, and so on, we provide coverage dates for various categories of journal venues. In this version, you can see we provide the coverage years for subscriptions specifically, as well as non subscriptions. NonSub is a category combining the aggregators provided by our library, the aggregators provided by our regional consortium, and open access journals. We also break out these NonSub categories individually. Finally, for the CR, we provide PCA coverage and print coverage, if any.

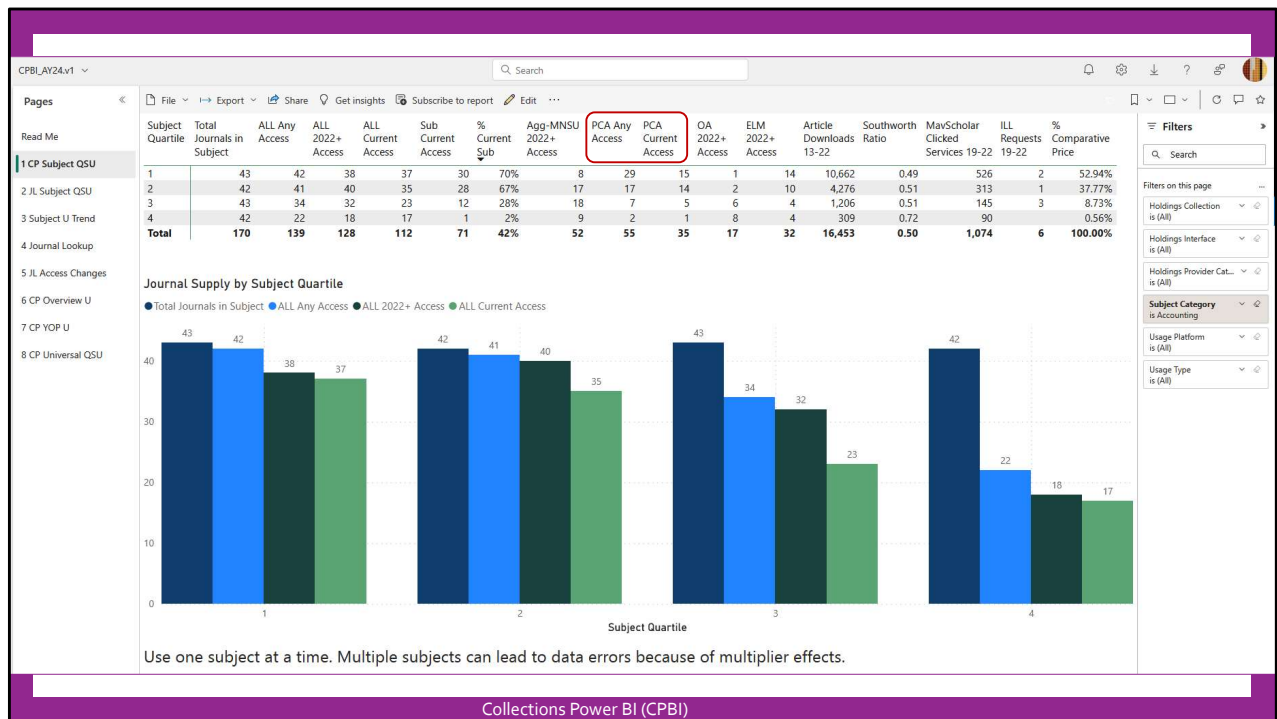
CRID	ER PCA Earliest Start	ER PCA Latest End	ER PCA Gap	PrintSer Start	PrintSer End	Count of Journals	Any Access	Current Access	Current Subscription	Southworth Ratio (Combined, Last 4 Yrs/ Last 8 Yrs)	Value Indicator (Comp Price/ 3 Yrs Total Downloads)	3 Yrs Total Downloads	LR Requests 2019	LR Requests 2020	LR Requests 2021	LR Requests 2022	LR Clicked 2019	LR Clicked 2020	LR Clicked 2021	LR Clicked 2022	
11973	1997	2023	0	0	0	0	1	1	1	1	0.31	4.97	9	1	0	0	3	1	0	0	1
11974	1997	2023	0	1965	1996	1	1	1	1	1	0.54	8.29	80	12	13	20	9	5	10	7	4
11975	2006	2023	0	0	0	1	1	1	1	1	0.84	9.66	20	0	0	0	3	0	0	0	3
11976	1997	2023	0	0	0	1	1	1	1	1	0.33	9.79	10	1	1	0	1	0	1	0	0
11977	1969	2023	0	0	0	1	1	1	1	1	0.52	0.61	51	0	3	11	12	0	2	7	7
11978	1999	2023	0	0	0	1	1	1	1	1	0.50	0.56	104	21	47	8	4	7	26	7	4
11979	1997	2023	0	1982	1996	1	1	1	1	1	0.52	0.11	317	27	27	43	51	15	13	25	38
11980	0	0	0	0	0	1	0	0	0	0	1.00	33.22	17	1	0	1	4	1	0	0	3
11981	1997	2023	0	0	0	1	1	1	1	1	0.61	0.07	671	79	110	140	117	40	82	97	75
11982	1999	2023	0	0	0	1	1	1	1	1	0.52	0.89	102	25	9	21	17	10	5	14	12
11983	2009	2023	0	0	0	1	1	1	1	1	0.57	43.80	4	0	0	1	2	0	0	0	2
11984	1997	2023	0	0	0	1	1	1	1	1	0.33	21.83	2	0	4	0	0	0	1	0	0
11985	1978	2023	0	0	0	1	1	1	1	1	0.61	0.37	390	27	68	66	72	16	37	38	49
11986	1997	2023	0	0	0	1	1	1	1	1	0.54	2.37	81	16	22	22	25	7	14	12	13
11987	1997	2023	0	0	0	1	1	1	1	1	0.54	0.16	207	9	22	30	39	2	14	19	20
11988	1997	2023	0	0	0	1	1	1	1	1	0.54	0.29	109	12	5	13	26	6	4	8	19
11989	1997	2023	0	1962	1996	1	1	1	1	1	0.62	0.06	392	131	83	82	58	44	40	47	40
11990	1997	2023	0	1970	1996	1	1	1	1	1	0.59	0.10	911	170	195	183	122	70	110	99	67
11991	1997	2023	0	0	0	1	1	1	1	1	0.54	2.37	75	2	18	7	19	1	10	6	14
11992	1997	2023	0	0	0	1	1	1	1	1	0.56	0.09	294	11	28	29	49	3	19	13	35
11993	1997	2023	0	0	0	1	1	1	1	1	0.47	1.48	42	3	10	17	7	2	5	14	2
11994	1997	2023	0	0	0	1	1	1	1	1	0.54	0.26	152	7	14	17	41	4	8	8	24
11995	1997	2023	0	0	0	1	1	1	1	1	0.57	1.01	103	5	17	22	17	2	13	9	13
11996	1997	2023	0	0	0	1	1	1	1	1	0.32	5.95	5	1	1	1	1	0	1	1	0
11997	1997	2023	0	0	0	1	1	1	1	1	0.51	2.44	118	16	21	20	9	7	15	16	7
11998	1997	2023	0	1968	1996	1	1	1	1	1	0.50	0.26	160	24	36	22	28	8	26	13	16
11999	1997	2023	0	0	0	1	1	1	1	1	0.68	0.26	67	11	5	12	14	2	3	7	13
12000	2009	2023	0	1981	2011	1	1	1	1	1	0.00	Not used	0	6	1	3	6	4	1	2	6
12001	1997	2023	0	0	0	1	1	1	1	1	0.55	0.20	147	17	27	36	23	6	15	24	12
12002	1997	2023	0	0	0	1	1	1	1	1	0.56	0.26	200	22	36	26	18	9	24	15	15
12003	1997	2023	0	0	0	1	1	1	1	1	0.53	5.02	14	5	5	2	2	3	4	1	1

As I previously mentioned, the CR supports Collection Assessment, so it's valuable to see our PCA coverage as we make decisions about whether to cancel some subscriptions or possibly break packages. PCA coverage can be one important factor as we consider the consequences of a cancellation, alongside several other factors. The PCA coverage data in the CR can also be helpful for Collection Administration, for example, to inform how we cap PCA coverage after a cancellation.

ASSIA_ID	SSA?	Title	Publisher	Country	Subject	Sub Start	Sub End	Sub Gap	PCA Start	PCA End	PCA Gap	NonSub Start	NonSub End	NonSub Gap	Any Coverage	Current Coverage	ILL Requests 2020	ILL Requests 2021	ILL Requests 2022 (to 9/30)	ILL Total Requests
1	N	Activities, Adaptation & Aging	Taylor & Francis Ltd.	United Kingdom	GERONTOLOGY AND GERI	1997	2022	0	2006	2022	0				1	1	0	1	0	1
2	N	Addiction Science & Clinical Practice	BioMed Central	United Kingdom	DRUG ABUSE AND ALCOHOL							2007	2022	0		1	1	0	0	0
3	N	Administration and Policy in Mental Health	Springer Nature B.V.	Netherlands	PUBLIC HEALTH AND SAFE	1997	2022	0								1	1	0	0	0
4	Y	Adoption & Fostering	British Association for Adoption and Fostering	United Kingdom	LAW	1999	2022	0				2006	2021	0	1	1	0	0	0	0
5	N	Advances in Dual Diagnosis	Emerald Group Publishing	United Kingdom	MEDICAL SCIENCES							2008	2021	0	1	0	0	0	0	0
6	N	Advances in Mental Health and Intellectual Disability	Emerald Group Publishing	United Kingdom	MEDICAL SCIENCES--PSYCHIATRY							2007	2021	0	1	0	0	0	0	0
7	N	African and Asian Studies	E.J. Brill	Netherlands	ANTHROPOLOGY							2002	2019	0	1	0	0	0	0	0
8	N	African Development Review	Blackwell Publishing Ltd.	United States	BUSINESS AND ECONOMIC	1997	2022	0	1997	2022	0	1999	2021	0	1	1	0	0	0	0
9	N	African Journal of Disability	AOSIS (Pty) Ltd	South Africa	HANDICAPPED							2012	2022	0	1	1	0	0	0	0
10	N	African Journal of Drug and Alcohol Abuse	Centre for Research and Innovation	Nigeria	DRUG ABUSE AND ALCOHOL							2008	2022	0	1	1	0	0	0	0
11	N	Age and Ageing	Oxford Publishing Limited	United Kingdom	GERONTOLOGY AND GERI							1992	1998	0	1	0	0	0	0	0
12	N	Ageing International	Springer Nature B.V.	Netherlands	GERONTOLOGY AND GERI	1997	2022	0				1997	2021	0	1	1	1	0	0	1
13	N	Aggression and Violent Behavior	Elsevier Science Ltd.	United Kingdom	PSYCHOLOGY	1996	2022	0								1	1	1	0	3
14	N	Aggressive Behavior	Wiley Subscription Service	United States	PSYCHOLOGY	1996	2022	0	1997	2022	0	1974	2021	0	1	1	0	0	0	0
15	N	Aging & Mental Health	Taylor & Francis Ltd.	United Kingdom	GERONTOLOGY AND GERI	1997	2022	0				1997	2020.75	0	1	1	0	1	3	4
16	N	AIDS Care	Taylor & Francis Ltd.	United Kingdom	MEDICAL SCIENCES--COMING OF AGE				1995	2022	0	1990	2020.75	0	1	1	0	0	0	0
17	N	Alter	Elsevier Science Ltd.	United Kingdom	HANDICAPPED	2007	2020	0								1	0	0	0	0
18	Y	American Journal of Drug and Alcohol Abuse	Taylor & Francis Ltd.	United Kingdom	DRUG ABUSE AND ALCOHOL				1997	2022	0	1993	2020.75	0	1	1	0	0	0	0
19	N	American Journal of Health Promotion	American Journal of Health Promotion	United States	NUTRITION AND DIETETICS	1999	2022	0				2003	2022	0	1	1	0	0	0	0
20	N	American Journal of Nursing	Lippincott Williams & Wilkins	United States	MEDICAL SCIENCES--NURSING	1996	2022	0	1900	2017	1					1	1	0	0	0
21	N	American Journal of Preventive Medicine	Elsevier Science Ltd.	United Kingdom	PUBLIC HEALTH AND SAFE	1995	2022	0								1	1	0	0	0
22	N	American Journal of Psychology	University of Illinois Press	United States	PSYCHOLOGY	2005	2022	0	1887	2018	0	1993	2021	0	1	1	0	0	0	0
23	N	American Journal on Intellectual and Disability	American Association of Intellectual and Disability	United States	MEDICAL SCIENCES--PSYCHIATRY	2009	2022	0				2012	2022	0	1	1	0	0	0	0
24	N	American Psychologist	The American Psychological Association	United States	PSYCHOLOGY	1946	2022	0								1	1	0	0	0
25	N	Anthropology & Medicine	Taylor & Francis Ltd.	United Kingdom	ANTHROPOLOGY	1997	2022	0				1998	2020.75	0	1	1	0	0	0	0
26	N	Applied Cognitive Psychology	Wiley Subscription Service	United States	PSYCHOLOGY	1996	2022	0	1997	2022	0	1987	2021	0	1	1	0	0	0	0
27	N	Applied Psychology	Blackwell Publishing Ltd.	United Kingdom	PSYCHOLOGY	1997	2022	0	1997	2022	0	1996	2021	0	1	1	0	0	0	0
28	N	Applied Psychology, Health and Welfare	Wiley Subscription Service	United States	PSYCHOLOGY	2009	2022	0	2009	2022	0					1	1	0	0	0
29	N	Archives of Suicide Research	Taylor & Francis Ltd.	United Kingdom	PSYCHOLOGY	1997	2022	0	2016	2022	0					1	1	0	0	0
30	N	Assessment for Effective Intervention	SAGE PUBLICATIONS, INC.	United States	EDUCATION	2000	2022	0	1979	1998	0					1	1	0	0	0
31	N	Assistive Technology Outcomes & Assistive Technology Industry	United States	United States	HANDICAPPED							2004	2022	1	1	1	0	0	0	0
32	N	Australian Journal of Primary Health Care	CSIRO	Australia	MEDICAL SCIENCES							2014	2022	0	1	1	0	0	0	0
33	N	Australian Journal of Psychology	Taylor & Francis Ltd.	United Kingdom	PSYCHOLOGY				1997	2021	0	2003	2021	0	1	0	0	0	0	0
34	N	Australian Journal of Rural Health	Wiley Subscription Service	United States	MEDICAL SCIENCES	1997	2022	0	1997	2022	0	1998	2021	0	1	1	0	0	0	0
35	N	Australian Occupational Therapy Journal	Wiley Subscription Service	United States	MEDICAL SCIENCES	1997	2022	0	1997	2022	0					1	1	0	0	0

I have also included holdings analysis categories in a custom report I provided to a colleague to support instruction. I was asked to compare Social Services Abstracts (SSA) with Applied Social Sciences Index and Abstracts (ASSIA). I wanted to keep this report simple so it would be easy to read. In addition to comparing the indexes, I added ILL requests and just a couple of holdings categories.

For instruction, in addition to understanding the strengths of each index alone, it is helpful to understand to what extent these indexes overlap and to get a sense of MNSU journal supply for these indexes. Understanding journal supply might save students' time as they search for articles to support their studies. MNSU librarians might also refer to journal supply and ILL data to inform journal collection development decisions. I included subscription, PCA, and NonSub coverage because these together provide a good sense of the stability of our journal supply for these indexes.



The CPBI has gone through several iterations. The draft version this year includes just 8 pages of data visualizations and lists, but it tends to grow over the course of the year to meet new needs. The CPBI is interactive and available across campus. It's a powerful tool because users can filter by subject or other variables. Formerly, we included many more filters, but we found that these were confusing to users. All the metrics in the CPBI update with the filter context. The various pages of the CPBI fulfill different functions. For example, this page provides an overview of journal supply, but we also provide aggregated quality and utility measures.

CPBLAY24.v1

Search

Pages

File Export Share Get insights Subscribe to report Edit

Title	Scimago Rank	Best Quartile	ALL Any Access	ALL 2022+ Access	ALL Current Access	Sub Current Access	Agg-MNSU 2022+ Access	PCA Min Coverage	PCA Max Coverage	OIA 2022+ Access	ELM 2022+ Access	DISTINCT ER Providers	Article Downloads 13-22	Southwot Ratio
Journal of Finance	25 Q1	1	1	1	1	1	1	1997	2023				1	1,607
Review of Financial Studies	51 Q1	1						1988	2019				1	290
Journal of Financial Economics	69 Q1	1	1	1	1	1	1	1974	1994				2	1,986
Journal of Accounting and Economics	190 Q1	1	1	1	1	1	1	1979	1994				2	321
Review of Finance	212 Q1	1											1	148
Journal of Accounting Research	252 Q1	1	1	1	1	1	1	2001	2023				1	338
Accounting Review	322 Q1	1	1	1	1			1926	2017		1		3	756
Review of Accounting Studies	351 Q1	1	1	1	1	1	1						2	118
Journal of Financial and Quantitative Analysis	425 Q1	1	1	1	1	1	1	1966	2018		1		4	409
Contemporary Accounting Research	612 Q1	1	1	1	1	1	1	1997	2023				2	238
Journal of Risk and Uncertainty	849 Q1	1	1	1	1	1	1	1988	2019				3	137
Accounting, Organizations and Society	955 Q1	1	1	1	1	1	1	1976	1994				2	185
Fiscal Studies	1204 Q1	1	1	1	1	1		1979	2017				2	77
Work, Employment and Society	1334 Q1	1	1	1	1	1	1	1987	1998				2	392
Mathematical Finance	1519 Q1	1	1	1	1	1	1	1997	2023		1		2	35
Financial Management	1663 Q1	1	1	1	1	1	1	1972	2019		1		3	370
Accounting, Auditing and Accountability Journal	1676 Q1	1	1	1	1	1	1	2003	2023				2	150
Journal of Technology Transfer	1718 Q1	1	1	1	1	1	1						2	56
Auditing	1797 Q1	1	1	1	1	1					1		2	186
Real Estate Economics	1847 Q1	1	1	1	1	1	1	1997	2023		1		3	129
Journal of Money, Credit and Banking	2134 Q1	1	1	1	1	1	1	1969	2017				5	257
Critical Perspectives on Accounting	2177 Q1	1	1	1	1	1	1	1990	1994				2	139
World Bank Economic Review	2372 Q1	1						1986	2017				1	69
Journal of Accounting Literature	2382 Q1	1											2	47
British Accounting Review	2808 Q1	1	1	1	1	1	1	1988	1994				2	61
Journal of Accounting and Public Policy	2858 Q1	1	1	1	1	1	1	1982	1994				2	107
Financial Analysts Journal	2862 Q1	1	1	1	1	1	1	1960	2015				3	442
Journal of Industrial Economics	2864 Q1	1	1	1	1	1	1	1952	2017		1		3	112
ASTIN Bulletin	2934 Q1	1	1	1	1	1	1	2014	2023				2	4
Journal of Business Finance and Accounting	3221 Q1	1	1	1	1	1	1	1997	2023		1		2	166

Use one subject at a time. Multiple subjects can lead to data errors because of multiplier effects. For Holdings Analysis, 1 = Yes.

Filters

Search

Filters on this page

Holdings Collection is (All)

Holdings Interface is (All)

Holdings Provider Cat... is (All)

Subject Category is Accounting

Subject Quartile is (All)

Usage Platform is (All)

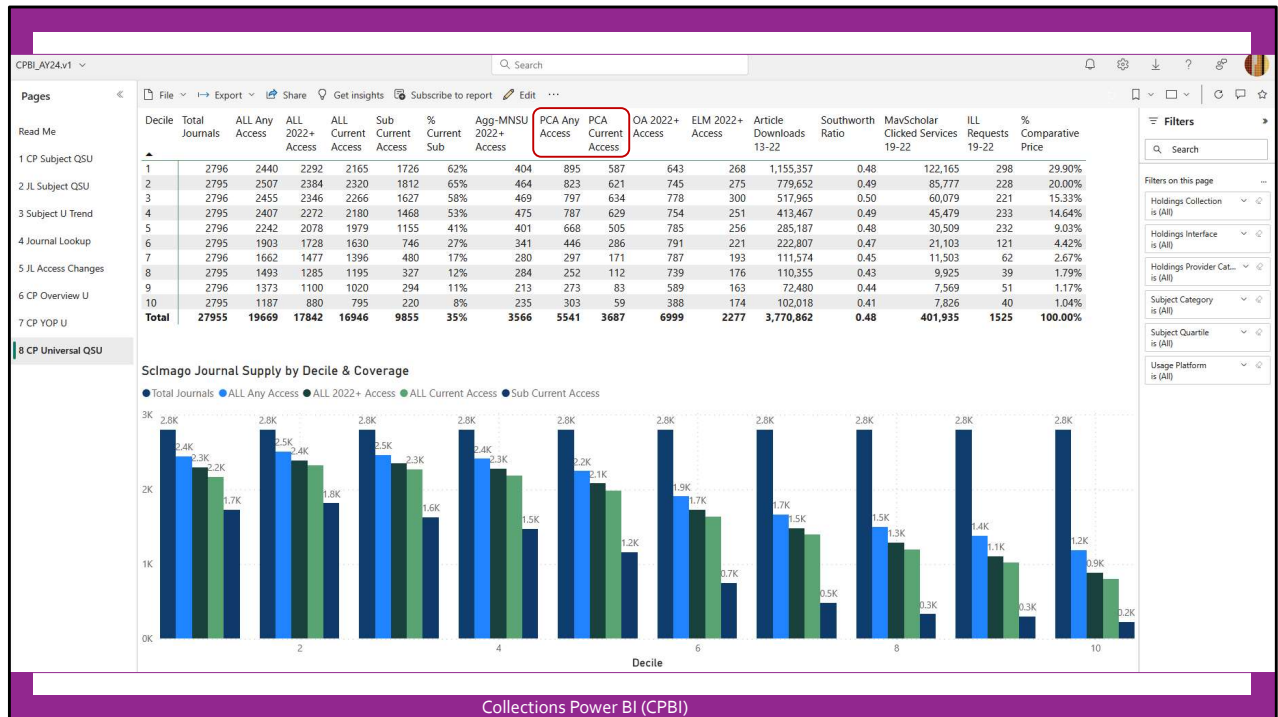
Usage Type is (All)

Collections Power BI (CPBI)

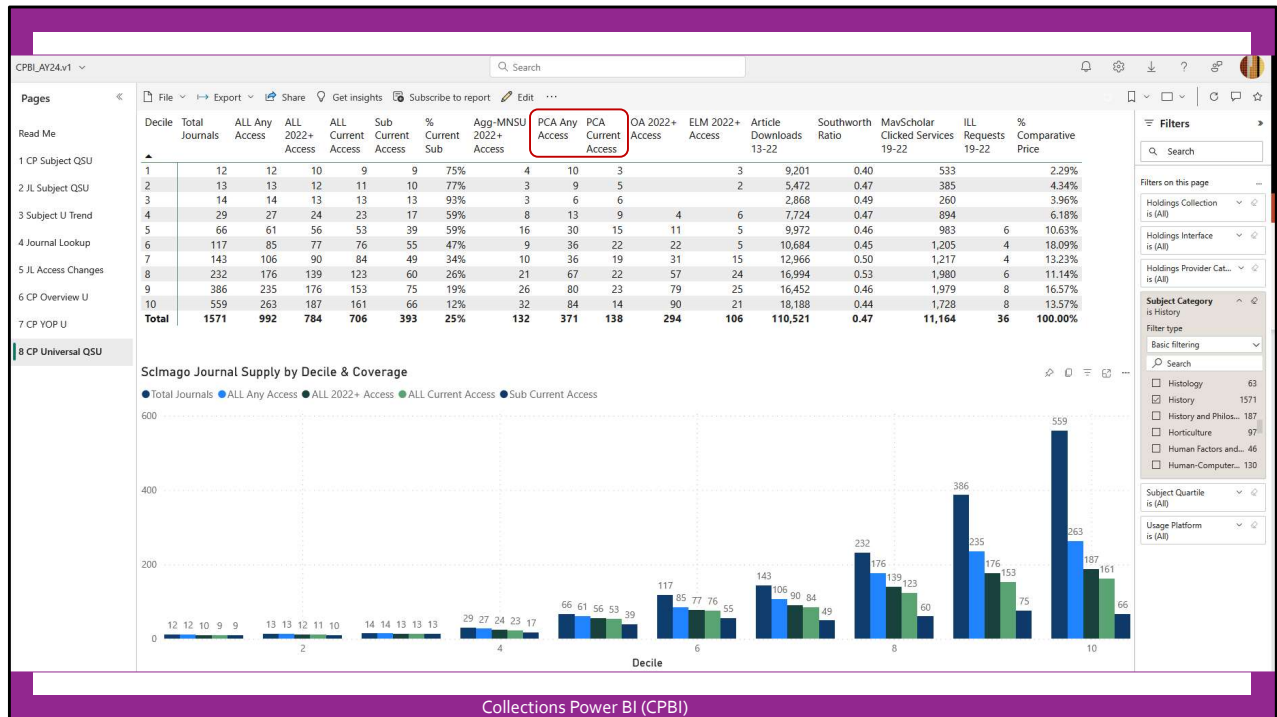
Users can learn more about the specific journals provided for subjects on the second page of the CPBI. Here we dive into more holdings analysis. Although the primary purposes of the CPBI are to support Collection Outreach and Evaluation, the CPBI can be a source of quick information to support Collection Assessment, too. We break out the PCA coverage specifically in case it's useful for Collection Assessment



The 4th page of the CPBI allows users to look up individual journals. I personally love this page specifically for Collection Assessment. I routinely check expensive individual subscriptions on this page to inform collection development discussions. At a glance, I can get a sense of sub and nonsub usage trends, citation trends, and some holdings analysis, including PCA coverage, in case we decide to cancel.



The 8th page mirrors the first page, but instead of summarizing journals by quartile *within* a subject, we summarize journals by decile within the universe of Scimago journals...

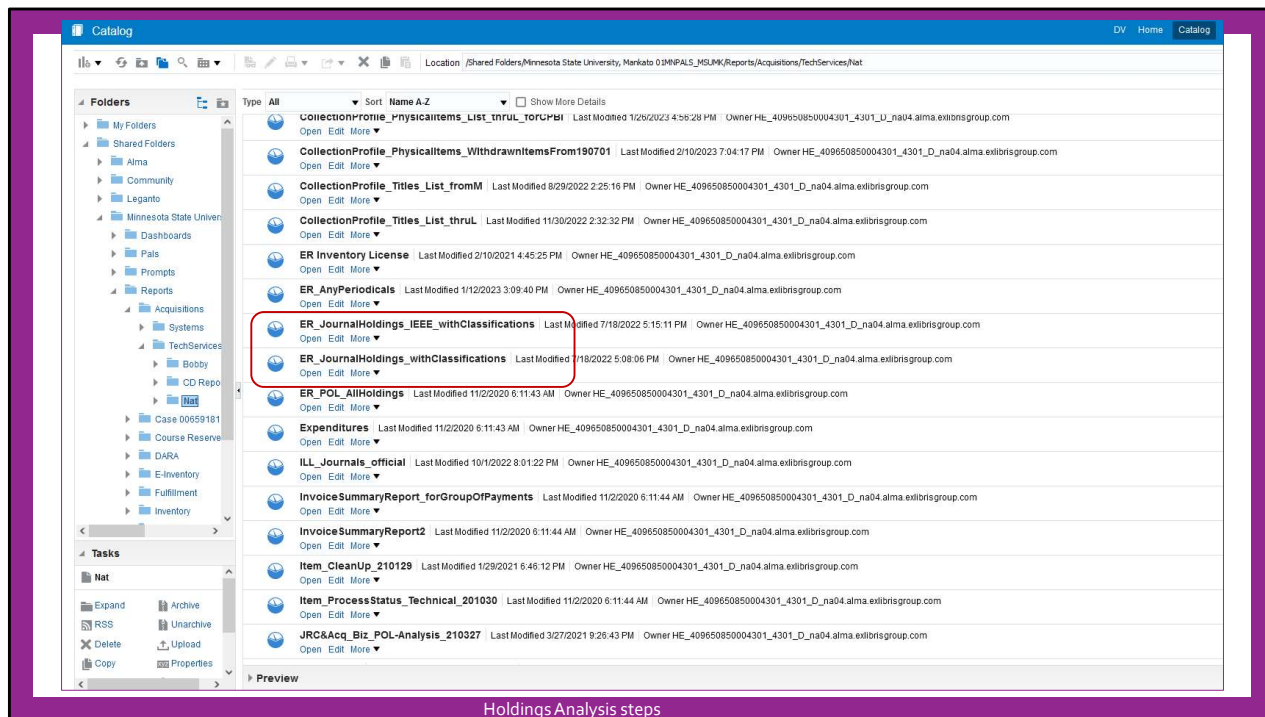


This can be interesting in case we want to draw attention to how subjects differ. Here, you can see the data summarized for History journals, which tend to rank lower than other journals only because Historians tend to cite each other less than scholars in other fields.

Anyway, I don't have time to explore these reports very deeply, but hopefully I've provided a basic sense of the importance of holdings analysis generally and PCA coverage specifically for the applications supported by our library's collection analysis reports.

How we prepare data for Holdings Analysis

Unfortunately, when we wrote the presentation proposal, I misunderstood how much time we'd have. I can't really provide a how-to in the couple of minutes I have left. I only have time enough today to provide a very brief overview of the steps we take to provide holdings analysis.



Holdings Analysis steps

In the first place, I pull data from our Library Management System, Alma. I've constructed a variety of lists to support a variety of reports. My preference is to get data out of Alma because it is easier and more efficient to combine data across numerous sources outside of Alma. I also prefer other tools for constructing reports, including Python, Tableau, Excel, and Power BI, because each of these tools provide advantages over Alma Analytics.

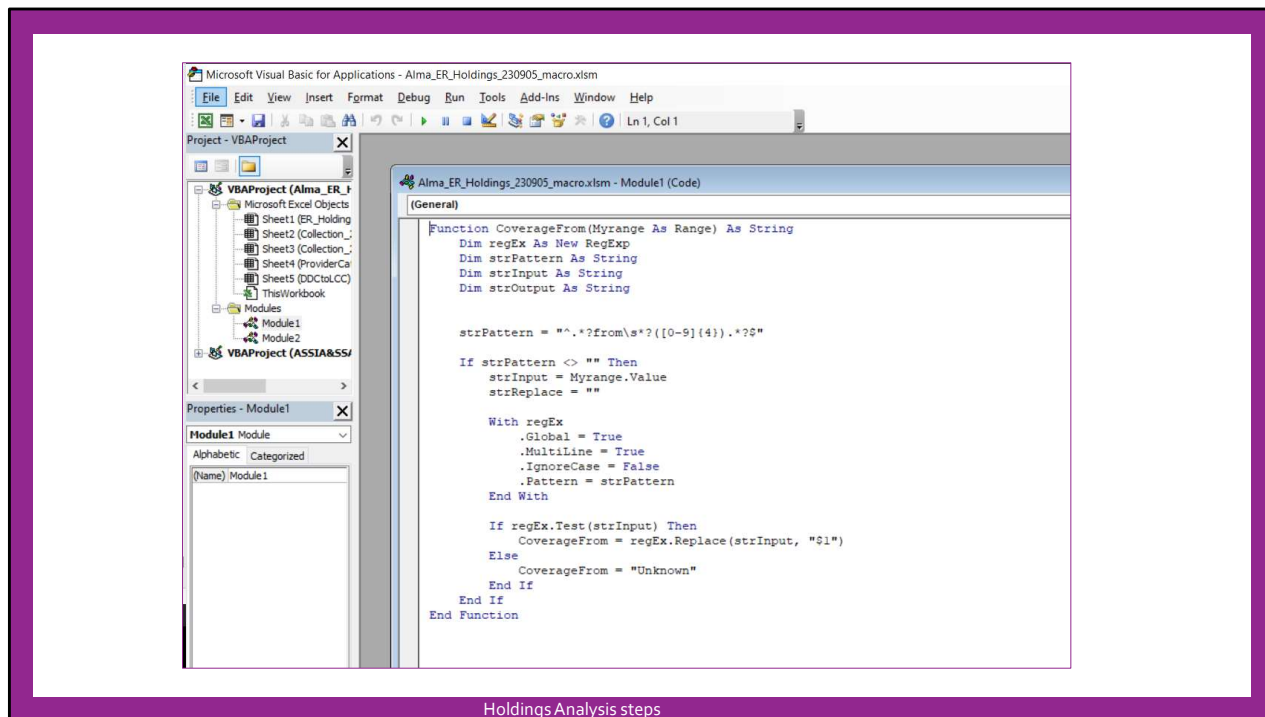
M	N	O	P	T	U	V	W	X	Y	Z
Holdings Collection	Holdings Interface	ProviderCategoryID	Holdings ProviderCategoryID	Embargo Month	Embargo Years	Coverage Information Combined	FirstFrom	LastUntil	LastUntil_True	GapCheck
Chronling America: Hi	Library of Congress	7	Newspaper Archive			Available from 1932-12-17 until	1932	1936	1936	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2009 until 2013;	2009	2013	2013	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2014;	2014	None	2023	0
EBSCOhost Communcial	EBSCOhost	1	Database			Available from 2014-3-1;	2014	None	2023	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2012;	2012	None	2023	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2015 until 2018;	2015	2018	2018	0
JSTOR Archival Journals	JSTOR	2	Journal Archive			Available from 1955-1-1 until 19	1955	1990	1990	0
ProQuest One Business	ProQuest	1	Database			Available from 2004-5-1 until 20	2004	2010	2010	0
US Government Docum	US Government Docur	5	Open Access			Available from 2000 volume: 1 is	2000	2007	2007	0
ProQuest One Business	ProQuest	1	Database			Available from 2018-9-6;	2018	None	2023	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2010 until 2017;	2010	2017	2017	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2011;	2011	None	2023	0
Nexis Uni	Lexis Nexis	1	Database			Available from 2009-5-14 until 2	2009	2017	2017	0
Nexis Uni	Lexis Nexis	1	Database			Available from 1992-2-11;	1992	None	2023	0
Nexis Uni	Lexis Nexis	1	Database			Available from 1972-8-15;	1972	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2012;	2012	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2014;	2014	None	2023	0
EBSCOhost SPORTdisc	EBSCOhost	1	Database			Available from 2008-1-1;	2008	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2000;	2000	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2015;	2015	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2006;	2006	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2011;	2011	None	2023	0
US Government Docum	US Government Docur	5	Open Access			Available from 2013;	2013	None	2023	0
US Government Docum	US Government Docur	5	Open Access	null	1	Unknown	9999	1111	2022	0
EBSCOhost Business So	EBSCOhost	9	ELM Database			Available from 2015-1-28;	2015	None	2023	0
Nexis Uni	Lexis Nexis	1	Database			Available from 1999-11-30 until	1999	2019	2019	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2013 until 2022;	2013	2022	2022	0
EBSCOhost Business So	EBSCOhost	9	ELM Database			Available from 2021-11-2;	2021	None	2023	0
EBSCOhost Business So	EBSCOhost	9	ELM Database			Available from 2019-9-4;	2019	None	2023	0
EBSCOhost Business So	EBSCOhost	9	ELM Database			Available from 2019-8-22;	2019	None	2023	0
EBSCOhost Business So	EBSCOhost	9	ELM Database			Available from 2014-2-7;	2014	None	2023	0
Gale In Context: High Sc	Galegroup	9	ELM Database			Unknown	9999	1111	1111	0
Nexis Uni	Lexis Nexis	1	Database			Available from 2014-5-13;	2014	None	2023	0
DOAJ Directory of Open	DOAJ Directory of Ope	5	Open Access			Available from 2015;	2015	None	2023	0
Checkpoint EDGE	Westlaw	1	Database			Unknown	9999	1111	1111	0

Holdings Analysis steps

After pulling holdings data from Alma, I process the data in Excel. I've also processed the data with Python, but I personally prefer Excel for this job. I often prefer semi-automation of tasks to full automation of tasks because I have found I have new insights almost every time I do the same task over again. I can never perform the same job the same way twice. In grade school, this was a challenge, but as an adult, I've found I can often add efficiency or value to processes by letting myself re-think them.

Although the holdings list has almost 200,000 rows, I can summarize the holdings data and assign provider categories, including PCA, to the holdings list in about an hour.

Of course, the reason I can extract PCA coverage dates for holdings analysis is because Annalis has set up the PCA collections.



Holdings Analysis steps

I rely heavily on Excel functions to perform my holdings data processing work as well as a couple of custom functions I developed using VBA.



Internet Reference Services Quarterly

Routledge
Taylor & Francis Group

ISSN: (Print) (Online) Journal homepage: <https://www.tandfonline.com/loi/wirs20>

Combine Journal Data to Support Reference and Instruction

Nat Gustafson-Sundell, Kellian Clink & Evan Rusch

To cite this article: Nat Gustafson-Sundell, Kellian Clink & Evan Rusch (2023): Combine Journal Data to Support Reference and Instruction, Internet Reference Services Quarterly, DOI: [10.1080/10875301.2023.2209573](https://doi.org/10.1080/10875301.2023.2209573)

To link to this article: <https://doi.org/10.1080/10875301.2023.2209573>

Holdings Analysis steps

After processing the data, I create strong matchpoints to other data sources. I've described how to do this work in a recent article...

How to Combine Journals Data from Multiple Data Sources Cleanly & Efficiently

Nat Gustafson-Sundell, gustan2@mnsu.edu
Collections Librarian, Technical & Collections Services Coordinator, Associate Professor

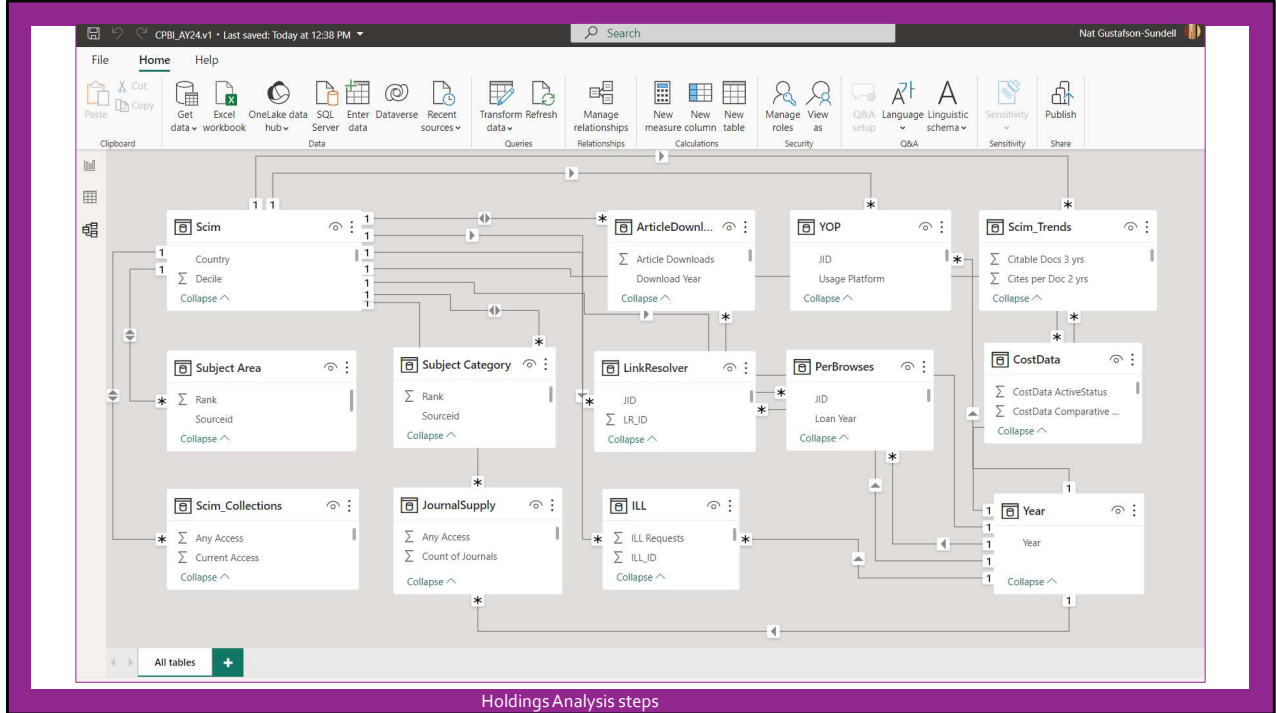
February 3, 2023
SUNYLA, Library Data: The Good, the Bad, & the Ugly

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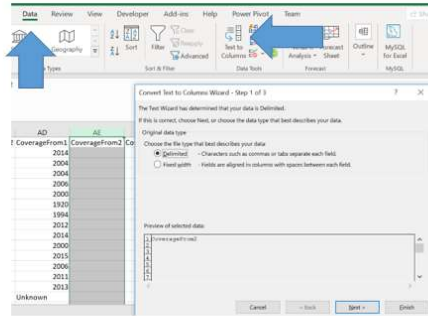
Holdings Analysis steps

...and in a video presentation. It takes about 5 to 10 minutes to match any data source to any other data source regardless of the size of the data.



Finally, I construct the reports. After I've created the matchpoints, report construction goes very quickly. The Index Comparison report took just a few minutes. The CPBI takes longer because it is considerably deeper, although Power BI itself does most of the heavy lifting. I created the most recent version of the CPBI in about half a day between reference questions during a Saturday shift. Here is a back-end view of the most recent version of the CPBI.

- a. For each column in turn: highlight the column, select text-to-columns from the Data tab, and click through the prompts without changing anything on the prompts. No additional columns will be created; instead, the fields will be converted to "General" which Excel will treat as numbers.



10. Add a column to the immediate right of the last CoverageFrom column, label FirstFrom.
 a. To populate the data for this column, compare all CoverageFroms to determine the lowest value. UPDATE any cell references prior to application:
 =IF(AK2="Unknown",AB2,MIN(AB2:AG2)) or for a bigger set to check:
 =IF(AK2="Unknown",AK2,MIN(AK2:AY2))

AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM
CoverageFrom1	CoverageFrom2	CoverageFrom3	CoverageFrom4	CoverageFrom5	CoverageFrom6	CoverageFrom7	CoverageFrom8	CoverageFrom9	FirstFrom		
2014									=IF(AK2="Unknown",AB2,MIN(AB2:AG2))		
2004									=IF(AK2="Unknown",AK2,MIN(AK2:AY2))		
2000											
1994											
2012											
2014											
2000											
2015											
2006											
2011											
2013											
Unknown											

Holdings Analysis steps

I do have documentation for each step, but the documentation is idiosyncratic because I wrote it to serve my own needs, so I wouldn't be able to share it in its current form. I do have plans to re-write a Python program specifically for the holdings data processing, so that could eventually be used by others... If used with my data combination instructions, I think others could easily construct their own reports using their preferred tools.

Thank you!

Pat Lienemann
pat.lienemann@mnsu.edu

Annalis Luck
annalis.luck@mnsu.edu

Nat Gustafson-Sundell
gustan2@mnsu.edu

<https://libguides.mnsu.edu/collection-analysis/research>

Anyway, I appreciate your patience. Please feel free to contact us if you want to talk. I've also provided a link to our library's other research on collections, licensing, and collection analysis.