Using Access to Create a Serials Review Database

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USING ACCESS TO CREATE A SERIALS REVIEW DATABASE

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Abstract

This year saw unprecedented cuts to the University of Washington Libraries' budget. As such it became necessary to undertake a serials review project to identify titles for cancellation. A database was designed to consolidate information relevant to the review process, such as perpetual access, cancellation restrictions, and cost per use. The database was used to generate easy-to-use reports to help librarians and fund managers make cancellation decisions. This paper details the process to implement the database and discusses the positive impact of these reports.

Introduction

In the budget year 2009-2010, the University of Washington Libraries faced an unprecedented budget reduction of 16 - 20%, resulting in a \$1.6 million reduction to our information resources annual base budget. A cut of this size created the need to cancel numerous journal subscriptions, possibly numbering in the thousands. Because of the way the budget and collections are managed, there could be up to 70 people involved in these difficult decisions. It quickly became obvious that previous methods of serials review would not be appropriate.

The problem was that the way the system was currently set up, librarians would need to review not only their lists of current subscriptions, but to make informed cancellation decisions would also need to review usage statistics, license agreements to find details on perpetual access rights or cancellation restrictions, search for ISI Impact Factor, and even make rough cost per use calculations, if possible. All of these steps would require viewing and searching different spreadsheets and locations. The work load for this project appeared unmanageable, especially for those without a thorough knowledge of Excel.

During one of the first meetings with librarians to show them the various sources of information they could use to begin their serial review project, it was easy to see frustration setting in as spreadsheet after spreadsheet was displayed. We decided to develop something that combined as much relevant information as possible. Using Access, we were able to combine subscription title lists, fund codes and payment details, usage statistics, Impact Factor and other bibliometrics, and license information together. Then, we constructed two reports: a printable PDF report listing all titles and their associated use, license, and package details, and a comprehensive excel spreadsheet listing all relevant information at the title level. Both of these reports can be limited to desired fund codes; for example, all titles paid for with Social Sciences funds, or just those titles paid for with Business funds.

An additional benefit of this project was that once usage was tied to titles and payments in the Access database, we were able to compute cost per use figures. Cost per use has turned out to inform cancellation decisions in a very transparent way: tying local use patterns to actual financial impacts on the library. Another benefit besides the fund reports was the ability to generate cost per use at the package level to inform decisions regarding the renewal of package or consortial deals.

Both the fund level and package level reports have had an enormous impact on the serials review process. Low and zero use titles, as well as those titles with a dramatically high cost per

use, were more easily singled out for cancellation. Cost per use and low use figures were used in communications with faculty to justify why titles were chosen over other titles.

Procedure

The following is the step-by-step process by which we created the serials review database. We list the general idea followed with the specific steps taken at the University of Washington.

General: Start by generating the list of subscriptions at the title level and importing it into Access. The ISSN field may need to be “cleaned up” first.

Specific: Export subscription info from Millennium

- Run list on all orders with status F (SERIAL NO ENC)
 - Order record number
 - Fund
 - Location
 - Title
 - Author
 - ISSN
 - PAID0708
 - PAID0809
 - DURATN/P+O
 - CANCELABLE
 - PUBLISHER GROUP
 - ERM LINK
- Clean up ISSNs in excel. Some ISSNs will be missing a hyphen, or will have extra digits after the main ISSN.
 - Create a new column next to ISSN column
 - Use this formula in the new column
 - =if(LEN(D2)=8, CONCATENATE(LEFT(D2,4), “-”, RIGHT(D2,4)), If(LEN(D2)=9,D2,LEFT(D2,9)))
 - Copy the data in the new column and paste special values on ISSN column.
 - Delete new column.
- Import spreadsheet to Access.

General: Generate a list of license information to include the resource name, archival rights, perpetual access rights, cancellation notes. Some work may need to be done to ensure a way to match license records with the related titles. Also, make sure the resource name matches the resource name used on usage statistics.

Specific: Export resource and license info from Millennium

- Run list on active resources and active licenses
 - Resource
 - Resource ID
 - Access provider
 - Resource record number
 - Archival Code

- Archival Note
- Cancel Code
- Cancel Note
- Perpetual access code
- Perpetual access note
- License record number
- In Excel, create new column named “SLK” to create SLK style number from ERM record number:
 - =concatenate(“SLK”, (LEFT(A1, 8))
 - Copy and paste special as values
- Confirm there are no duplicate records. Resource Record number should be unique. Duplicates may have occurred if there was more than one active license per resource.
- Add column “ScholarlyStatsName” using Access
 - Upload excel table to Access
 - Create new small table matching ERM access provider with ScholarlyStats name
 - Run a make table query with all elements of the resource table plus ScholarlyStats name from new table, matching on access provider.

General: Compile usage statistics into one file. ISSNs may need to be “cleaned up”, and resource names may need to be added. Upload to Access.

Specific: Get usage report from ScholarlyStats; import to Access and prepare for matching.

- Clean up ISSNs in excel. Some ISSNs will be missing a hyphen, or will have extra digits after the main ISSN, or will be ISBNs.
 - Use the formula =if(LEN(D2)=8, CONCATENATE(LEFT(D2,4), “-“, RIGHT(D2,4)), If(LEN(D2)=9,D2,LEFT(D2,9)))
- Upload data to Access, with the name Usage2008. Sum usage by ISSN within each resource (this eliminates separate listing of backfile titles which leads to duplicate matches in final query). In Access, make a new query with Usage2008 as the only table. Select the Totals option and use MPS Collection Platform, ISSN, and YTD usage fields. Group by the first two and sum the last. Use the “Make Table” query to create the new table. Use this new table in place of the original ScholarlyStats usage from now on. Call this table 2008UsageUnique.
- Confirm usage is stored as a number, not text. This is essential for cost per use calculations later.
- In Access, create a new query using only 2008UsageUnique. Pull in all fields and in the next blank field, create a new field that concatenates ISSN with ScholarlyStats name. Type: Combo08:[ScholarlyStatsName]&[ISSN]. Call this query 2008UsageCombo.

General: Collect any additional bibliometric data available, and upload to a table in Access.

Specific: Upload bibliographic data spreadsheet with Eigenfactor, Impact Factor, UW articles, and UW citations.

- ISSN
- Eigenfactor
- Number of citations (make sure ISSN is unique)
- Number of articles (make sure ISSN is unique)
- ImpactFactor
- Any other factor that has one value per ISSN.
- Format cells in Excel so that all numbers have 3 decimal places and are stored as number. Make sure that ISSN values are unique and that every row has an ISSN. (Conditional formatting – unique values; then sort by cell color to see all the duplicate values near the top).
- Upload to Access, call this table Bibliometrics.

General: Upload resource and license information into Access. If using codes, create dictionary tables to translate short codes to long descriptions.

Specific: Create Resource information table in Access.

- Import resource spreadsheet into Access.
- Create small table PerpetualDictionary with two fields: perpetual access code, perpetual access description. May need to refer to Millennium to get the fixed field values. (ARCHVLPRO)
- Create small table ArchiveDictionary with two fields: archival provisions code, archival provisions description. May need to refer to Millennium to get the fixed field values. (LCODE2)
- Create small table CancelDictionary with two fields: cancel code and cancel description. May need to refer to Millennium to get the fixed field values. (LCODE2)
- Create a query with all fields in the Resources table linked to these three small tables to pull in the code descriptions. Call this AllResourceDataWithDictionaries.

General: Combine the data in Access with queries. To get usage data to match to title information, you will need to create new columns in both the usage and title tables consisting of ISSN combined with resource name. When matching usage and titles, match on this new column. This way, for those titles appearing in multiple resources, usage will match properly

Specific: Combine Data

- Create a query to match AllSubs to Bibliometrics on ISSN. Call this query AllSubsWithBibliometrics.
- Create a query to match AllSubsWithBibliometrics with AllResourceDataWithDictionaries matching on ERM link/SLK link. Call this query AllSubsWithAllResourceAndBibliometrics.
 - In an empty field in this query, create a new field that concatenates ISSN with ScholarlyStats name. Type: ComboAllSubs:[ScholarlyStatsName]&[ISSN]
 - Make a table from this query. (We found if we use this query in future queries Access becomes strange.)
- Create a query to match the table AllSubsWithAllResourceAndBibliometrics with 2008UsageCombo matching Combo08 to ComboAllSubs fields.
 - This should result in every subscription order matched to resource and license info, bibliometrics, and usage data.
 - Make a new table called AllSubsResourcesBiblioUsage.
- Export the table AllSubsResourcesBiblioUsage to an excel spreadsheet to calculate cost per use column, and import it back into Access. Call this new table FinalTable.
- Make a new query called FundReport, selecting only those fields of use to selectors. Limit to desired fund. Use this query to create a report. Be sure to save the query for each fund before regenerating the report.

General: Create a query on your final table containing all data. Decide which data to base reports on. Suggestions: fund codes, subject codes, or other codes that organize your collections. Run the query and export to Excel for each code designation

Specific: Fund Report – excel spreadsheet

Run the FundReport query, limiting to the desired fund. Use something like “LIKE “6*” in the criteria field. Save, and export the results to Excel. If generating the reports for the first time, run one report for each main fund, “1*”, “2*”, etc until all codes are complete.

General: Determine which fields are most important to see at a glance. Create the report using only these fields and ensure that all fields fit within one page width. This enables the report to be easily printed and taken to meetings.

Specific: Fund Report – Printable PDF report

Make a new report in Access. Use the following fields:

- Fund
- Record#
- Subscription
- Location
- PAID0708
- PAID0809
- 2008 e-use
- 2008 cost per use
- 2007 UW articles
- 2007 UW Citation
- ISI Impact Factor
- Cancel
- Archival

Conclusion

The development of the serials review database and the resulting reports dramatically affected the serials review project. Librarians and fund managers had a much easier time accessing all the relevant information about the titles in their areas. Package level reports helped guide higher-level renewal decisions and were even used as negotiating tools to achieve lower percentage inflation rates than were previously quoted. We received positive feedback from many of the librarians who used the new reports and were told how beneficial they were. In conclusion, the time spent developing the database was well worth the benefits.