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Serials Workflow Changes: Transitioning from Print to Digital Subscriptions

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Abstract

Academic library collections are transitioning from print serial resources to digital subscriptions. Due to smaller library budgets, users' preference of electronic resources, and publishers' emphasis on electronic-based full-text publishing, print serials are no longer the preferred accessible format. Many libraries are increasing their purchasing of electronic serial resources and reducing their print versions. This has created an impact on library workflows. This paper looks at the reasons for the cancellation of print serials and the impact of the workflow at F. D. Bluford Library.

Introduction

For years, libraries have purchased duplicate formats in the form of print and electronic resources. With declining library budgets, popularity of electronic journals, and higher electronic-based full-text publishing, some academic libraries have decided to answer budget issues, and satisfy users by purchasing more electronic-based serial collections and less print serial titles. Consequently, Technical Service departments have had to make changes to staff workflows.

The first section of this paper discusses the impact of budgets on academic libraries and the acquisition of print serials. The second section looks at the appeal and benefits of electronic resources among users. The last section discusses electronic-based full-text publishing's impact on print serial journals and how it contributed to the cancellation of many print serial subscriptions and the impact on staff workflow at F. D. Bluford Library's serials department.

Budget Issues

Many state budgets have decreased due to the decline of the economy, resulting in lower state tax revenues for state-funded universities of higher education. For example, in 2011, the University of North Carolina system (16-campus) budget was cut by \$414 million dollars by state legislators (Associated Press, 2011). The decline in the budget affected many departments and programs at the universities, including the library.

As a result, some libraries have managed their shrinking budgets by cutting back on the acquisition of new materials, including print journal subscriptions. According to the Library Journal's *Periodical Price Survey*, other academic libraries are also facing budget challenges and may cancel additional print serials. This survey states that of the 450 libraries responding to EBSCO's Information Services' 2011 Library Collections and Budgeting Trends Survey (Rapp, 2011), 34% of the libraries, majority academic libraries, reported budget cuts in 2011. Many of the respondents anticipated 44% budget reductions for the following fiscal year and continued subscription changes from print and print/online to online subscriptions for 2012 (Rapp 2011).

Users

Ohler (2006) suggests the Internet has forever changed the expectations of our users, and as information suppliers libraries need to acknowledge the changes in our society, culture, and technology to compete for library users. Academic libraries are purchasing less print and more electronic journal subscriptions in an effort to meet this challenge and user expectations. Research studies have shown that students and professors alike enjoy using electronic journals for many reasons. Both Newby (2005) and Tenopir's (2003) research studies show that faculty and students find the electronic format to be easily accessible, useful, and a time saver. The studies echo the benefit of electronic resources: "around the clock" access, the flexibility to work from any

location and with multiple types of resources at one's fingertips. According to a user survey conducted at the St. Augustine Libraries campus of the University of the West Indies, (Premchand-Mohammed, 2011), users are well aware and pleased with these benefits. The survey reported that nearly 70% of students and faculty were satisfied with the coverage of the electronic resources.

Publishers

Libraries have traditionally purchased printed journals to offer access to various types of information, but the shift to electronic information resources appears to be the future. Today, full-text databases offer library users electronic access to journal publications in various disciplines (Chambers & So, 2004). Formerly, publishers presented libraries the option of print only or print plus the electronic selection (Prabha, 2007). The technology to produce and provide electronic journals has developed and there are several purchasing models to acquire access to electronic journals. Libraries can now opt to license individual journal titles or in a group from various publishers and/or aggregator packages and by subscribing to full-text article databases (Prabha, 2007).

Serials Staff

The Serials staff consists of three people, head/serials librarian and two university library technicians. The workflow for the head/serials librarian consist of managing staff; cataloging serials; setting-up of new serial records; updating holding statements, discontinued titles, and name changes; and database maintenance of records related to serials.

One of the university library technicians' traditional print workflow responsibilities include checking in serials, processing items for bindery, adding item records, distributing mail, and repairing damaged materials. The other university library technician is also responsible for checking in serials, processing items for bindery, and labeling of materials for the serials and cataloging departments. With these responsibilities comes the physical processing of materials of adding

barcodes, security strips, stamping materials, and labeling of books and bound journals.

As the library's budget decreased, users' preference for electronic resources increased, publishers offered libraries more full-text journals, and less print serials subscriptions have been purchased by our Acquisitions department. This has resulted in less checking-in of journals, magazines, newspapers, annuals, standing orders, and microform; adding item records; creating new serial records; binding; and claiming of late serials. The focus is now more on building an electronic collection.

Cancellation of Print Serials and Database Maintenance

In earlier years, claiming, binding, checking-in serials, and labeling were staples of the serials department. Print serials titles were regularly purchased, and the set-up of newly created serial records and check-in cards were commonplace. Open-ended holding statements stood as a testament to our large print journal collections. However, in the spring of 2009, our interim library dean, due to budget shortages, made the decision the library would cancel 968 print serial subscriptions for the 2009/2010 fiscal year. The following year, she appointed an E-Resource Taskforce committee, charged to review and cancel titles due to budget issues for the 2011/2012 fiscal year. This resulted in the cancellation of 142 additional print serials and 66 print/online subscriptions. Currently, we have 396 print serial subscriptions. The E-Resources Taskforce committee has already met this year and targeted 25 print serials and 12 print/online subscriptions to be cancelled for 2013.

With a diminishing print collection, most would think the next logical serials workflow transition would be to focus on learning new skills for managing the ever-growing electronic collection. However, we subscribed to Gorman's (1998) school of thought; database maintenance duties should not be overlooked. Serials require frequent care as changes occur with them on a regular basis. He states serials should be looked after through its lifecycle. Therefore, we shifted some of our workflow focus on database clean-up of

cancelled serial title records, check-in cards, and updating holding statements in an effort to ensure the integrity of catalog holdings for users.

As numerous print serials were cancelled at our library, the university library technicians received hands on instruction on how to update serial records, delete the check-in cards and miscellaneous notes, and update holding statements. One of the tools used to facilitate the updates of the serial records was Ebsconet and Millennium, the library's integrated library system. Ebsco is our main vendor and offers a summary of publication reports in Ebsconet, their web-based subscription management system. This report list all of our library's title subscriptions and other information such as cost, format, start date, expiration date, and other title-related information. This report is downloaded into Excel and used as a working list of titles of the print serials cancelled at our library. We also used Ebsconet to search each cancelled title, making sure that the information on the title screens show previous subscription, year of expiration date, and the order status of "expired" prior to updating serial records and deleting check-in cards and miscellaneous notes.

Once the technicians verify the print serial title has been cancelled in Ebsconet, the title is searched in our Millennium serials module. The check-in record is changed in the SCODE 2 field to reflect (subscription cancelled), and an internal note is added to show the year, staff member's initials, and the date processed. If necessary, any miscellaneous notes should be deleted. Next, the technician updates the holding statement using the library's inventory listing of bound/current journals, then opens the card tab and deletes all of the check-in boxes. These steps are repeated for each cancelled print title.

In conclusion, shrinking budgets, users' preference for electronic resources, and improved production of full-text journal titles have caused the cancellation of an increasing number of print journals at our library. The cancellation of 1200 print serials has reiterated the importance of database integrity and maintenance. With the library's continued transition from print to electronic journals, this will undoubtedly be an ongoing effort by the serials staff.

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