Group Therapy-Keeping JSTOR Journals in Hardcopy and Dealing with Auditors

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Gripe...Submitted by Keith Clouten
(Library Director, Andrews University)

We’ve recently acquired JSTOR and for space reasons we would like to pursue the physical removal of the journals from our shelves. We will, of course, maintain our subscriptions and retain copies beyond JSTOR’s “Moving wall.”

I would like to know how other libraries have dealt with this issue, and the rationale for whatever decision was made.

Response...Submitted by Bonnie MacEwan
(Asst. Dean for Collections, Pennsylvania State Univ.)

Many libraries are struggling with this issue and it is one of the most interesting aspects of JSTOR that it has done so much to change the scholarly communication environment and not made nearly as much progress toward changing the paradigm it was created to change, storage. JSTOR is conducting a survey on this issue right now.

At Penn State we are just beginning to struggle with these issues, and we have an interesting twist on the usual questions around storing and discarding titles. Our libraries are scattered around the state of Pennsylvania. We try hard to minimize duplication, but some redundancy in our holdings is inevitable given our geographic organization.

We believe this organization may provide some opportunities to use JSTOR as a storage model. We plan to look at the duplicate holdings of JSTOR and investigate opportunities to reduce our holdings to a single paper copy. This will free a significant amount of shelf space in the small libraries located around the state while insuring paper access to back up the electronic version.

We are, also, beginning to think about the remaining paper as an artifact and discuss a storage plan that recognizes this fact. We are investigating the implications of using a part of our large storage facility as a journal storage and delivery area. The paper copies of journals available in electronic formats could be stored in this facility. There is much to suggest that the public will usually use the electronic format even when the paper copy is shelved in our libraries. If a patron needs the journal as an artifact, the electronic version on JSTOR or any other service will not be a substitute. When we receive such requests, we will make arrangements to give the patron access to the paper version without regard to location.

We are taking this conversation a bit further and discussing using the space to scan and deliver little used paper materials not yet available in electronic formats. The article could be scanned locally or purchased from a document delivery service. We will investigate the cost effectiveness of both approaches. — EC by JC

Gripe...Submitted by Susan Mueller
(Director of Technical Services, The Univ. of Montana)

At my institution a few years ago, we in serials were told that we had to split one subscription cost in order to be paying for our subscriptions in the same year that we received them. In other words, our fiscal year runs from July 1 to June 30 but our subscriptions run from Jan. 1 to Dec. 31, so half of the previous year’s bill (Jan. 1 to June 30) and half of this year’s bill (Jul. 1 to Dec. 31) are combined to come up with our payment to our major vendor. We pay the vendor the actual amount, but on the books we show the two halves. These don’t equal the billed and paid because of inflation, change of titles, etc. It is also very confusing when reconciling our local online system with the university’s system. Does anyone else have to it this way—especially state-funded libraries? We were told to do this because of an auditor’s recommendation. If that were the case I would think other libraries would have to also. Any insight would be helpful.

Response...Submitted by Roy Reinalda
(Executive Vice President, RoweCom, Inc.)

Shakespeare wrote that the first thing you did to improve society was to shoot all the lawyers. I’m sure auditors would have been next on the list.

In almost all institutional accounting regulations, the limits attached to fiscal year spending are meant to preclude expenditures of funds (or obligation of funds) that have not yet been encumbered or approved through the varying governing bodies. However, there are many such purchases that, by necessity, must be handled this way. For a typical library, this could include, but are not limited to, computer equipment, installment payments, licensing, maintenance of equipment, etc. The multiple year contracts held with various library supply agents are in this grouping. While no one (especially state institutions) wants to deal with expenditures across fiscal years, there are accounting rules that allow this to occur, based on certain criteria.

1) Does it have ongoing value that can be capitalized? (Computer equipment is a prime example.)
2) Does it have enduring value that is sustained? (A rare book collection is an example.)
3) Is the purchase of a service or product that is extended over multiple fiscal years, ‘front end loaded’ from a payment standpoint and free of any additional monetary obligations in year two and beyond? This fits prepaid subscriptions. (This does not fit standing orders where a commitment to buy may be in one fiscal year and the pricing and payment in another.)

The suggestion the auditor made in this particular case is one that may make it easy to account, but sell to administer. While most subscription agencies can help split funds (or provide files that can be split) they must pay, and be paid, at the start of the subscription.

I suggest that the library go to accounting and request an accounting alternative that will be less obtrusive to the day-to-day administration of their funds.

Response...Submitted by John Blosser
(Head, Serials Department, Northwestern University)

Our library follows a September through August fiscal year, with the bulk of our subscriptions renewed through vendors in the fall for the following January through December period. We do not have to split payments to associate half-year subscription payments with a subscription in the same year that we received it. In other words, our fiscal year runs from July 1 to June 30 but our subscriptions run from Jan. 1 to Dec. 31, so half of the previous year's bill (Jan. 1 to June 30) and half of this year's bill (Jul. 1 to Dec. 31) are combined to come up with our payment to our major vendor. We pay the vendor the actual amount, but on the books we show the two halves. Thesedon't equal the billed and paid because of inflation, change of titles, etc. It is also very confusing when reconciling our local online system with the university’s system. Does anyone else have to it this way—especially state-funded libraries? We were told to do this because of an auditor’s recommendation. If that were the case I would think other libraries would have to also. Any insight would be helpful.

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They Used to Call It Publishing —
Electronic Business XML

by Sandra K. Paul (President, SKP Associates, Managing Agent Book
Industry Study Group, Inc.) <Sandy@SKPAssociates.com>

In previous issues of Against the Grain, we have addressed XML in
the Chaos column (see ATG v. 10/96 p. 75 ff.), touting its benefits and
describing the many players attempting to use it for electronic data interchange
(edi). The result, as we feared, was a wide
variety of XML/EDI formats, no two of
which looked or functioned exactly alike.

As reported, a sub-group of American National Standards
Institute (ANSI)-Accredited Standards Committee X12 finalized a report on how one
should approach the development of
XML tags for the existing ANSI X12
standards, while groups as well known as
Microsoft and as unknown as an individual in Germany developed their own
tagging structure.

On November 17-19, 1999 a meeting
was called which, I hope, will end the
confusion and create a set of meaningful
XML/EDI standards. The sponsors of
that meeting are the United Nations sub-
group that is responsible for the
EDIFACT EDI format and OASIS (the
Organization for the Advancement of
Structured Information Standards)
with a mandate to undertake a 15-18
month program of work. Their “Agreement” states:

“The purpose of ebXML initiative is to
develop and publish, in the public do-
main, relevant and open technical speci-
fications in support of domestic and
international EB exchanges.”

Delegates from over 120 standards
organizations and companies from 17
countries participated in the meeting, which
took place at the San Jose, CA offices of
Sun. As a result of two days of intensive
interaction, 8 working groups were
formed with the goal of bringing this all
together into an integrated global XML
solution for the exchange of all electronic business data.

I am one of those who hope that the
results of this effort will be the standards
that we’ve all been waiting for. To keep
up with their progress, take a look at
www.ebxml.org or www.ebxml.com!

Group Therapy
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