



Program Work Day

ASERL Journal Retention Steering Committee

February 12, 2013

Georgia Tech Library, Atlanta, Georgia

Participant List: See attached

Welcome & Introductions. John Burger opened the meeting at 9:32 am. Participants introduced themselves.

Brief ASERL Project Update, Review of WRLC's Journal Archiving Program – *John Burger, Mark Jacobs/Bruce Hulse* – See <http://bit.ly/Wn3Kuu>.

Discussions – How to Document this Retention Agreement within the MARC 583 field; Adding Subject Heading Info to our Spreadsheets – *Cheryle Cole-Bennett, John Burger*

Cheryle Cole-Bennett provided an overview of the recommendations from OCLC. See <http://bit.ly/Y7ADfg>. The group discussed these recommendations and how they might fit ASERL's needs.

- There was consensus that obtaining additional OCLC symbols for each participating library did not justify the additional costs and workload.
- It was recommended that we implement a small advisory cataloging task force to help understand the implications of these recommendations. The work of the group should be completed in the next 45-60 days.
- There was active discussion about the level of reviews desired by this program – a base level review is required; would additional reviews be desirable?

Open Questions

- If libraries make the suggested changes to bib records in their local systems, can that data be extracted and exported to OCLC? This led to questions about batch loading processes.
- There appears to be no way to indicate a title may be shared with more than one archive system in the Subfield \$f in the MARC 583 field. The \$f is repeatable so should be able to document the information here, but to what level of specificity?
- The question was raised as to an expectation for the staff level of the person conducting the completeness review – by librarians, staff, students? UVA indicated that they are conducting a volume-by-volume physical review, whereas Georgia Tech indicated that their items are already in boxes so they are doing a bib record review. There was agreement that a base level review could likely be done by students, whereas a mid-level review (or higher) would require an additional level of expertise.

Subject Heading Information for Retained Titles – the Steering Committee had previously agreed to remove this from the spreadsheet. However, there is an ongoing desire to have a high-level concept of what is being saved. Can basic subject heading info be added easily/automatically? There was

discussion of using Ulrich's to provide the first subject heading entry in Ulrich's for each title. Members agreed to assist sites who did not subscribe to Ulrich's. The Steering Cmte asked that this issue be vetted by the cataloging task force.

Demonstration/review/critique of first release of Journal Retention and Needs Listing (JRNL) developed by University of Florida – Winston Harris

Winston Harris gave a brief overview of the software. JRNL allows for different levels of users – from a “basic level” that has limited editing capabilities to a user with advanced rights permissions.

The University of Miami reported great success using the tool to compare their holdings against what is in the database.

The JRNL tool requires the use of ISSN for all entries. Cheryle agreed to contact participating libraries that have not provided ISSNs, or multiple ISSNs. Amy Wood (CRL) indicated that they are engaged in discussions on how to batch assign ISSNs for older titles that were published before ISSNs were invented. Information on assigning ISSNs can be found on the Library of Congress website at <http://www.loc.gov/issn/faq/index.html>

There was discussion about JRNL database does not currently process ranges of gaps. For example, “Volume 4, 1994 – Volume 6, 1996” cannot be a submission -- each volume/gap must be listed as a single instance. Winston indicated that the database could be modified to allow gaps to be listed as a range of volumes, but costs would be a factor in making such a change.

There was consensus that the WRLC facility should be added to JRNL as a standalone archiving program. For consideration by the cataloging task force: Would listing WRLC separate in JRNL affect the naming convention used in the 583 action notes?

The group would like the JRNL system to include the holding confirmation (bibliographic or physical level of validation) in the database records.

Nomenclature: In JRNL, “complete” does not mean “no gaps.” A run is “complete” as per the library's ownership of the title run.

The database is set up by default to allow users to see the items for archive programs in which they participate. This means you can make judgments on agreements that are applicable to your institution.

Branding conversation – Lunchtime conversation

John Burger raised the issue of branding for this program. It's helpful to have a distinct name/brand for this effort for discussions with people outside the library, such as faculty, potential funders, others.

Does the word “trust” in the title (e.g., “storage trust”) invoke an image of value, reliability? Do we want to keep J-Retain in the title? Will it only be journals going forward? Not necessarily – may include monographs in future.

Carol Cramer has been toying with the acronym “SERTAIN” – to convey SE (southeast) and “retain.” The WRLC reps suggested it might be good to stay away from using southeast in the name, as the program may grow to include other partners in the future.

The branding working group (Carol Cramer, Joseph Thomas, plus reps from WRLC) will discuss this further.

ASERL/WRLC Interoperability with CRL's PAPR Program – Amy Wood

The current PAPR registry has two sides – a directory side and an archived titles side. The registry can be viewed at <http://bit.ly/myRkoX>.

PAPR is designed to be used by archiving programs for comparative data – to determine who owns what and where it is archived. While an OCLC WorldCat record indicates ownership of an item, it provides no assurance that the owning library will retain it. PAPR will allow users to make informed decisions regarding discards based on availability of retained copies in the region/state/nationally and the terms/agreements in place.

There was discussion about the desired number of print copies of content, potential for natural disaster or other losses, etc. There was consensus that the number of copies will vary depending on the discipline and each institution's curricular interests.

Amy indicated that CRL is investigating options for automating the documentation process for the MARC 583 action notes in local holdings records by using the bib records (which contain 583 action notes) contributed by archiving programs. There was discussion about generating the 583 fields locally versus outsourcing to CRL/other providers. The Steering Committee asked for input on this matter from the cataloging task force.

There was discussion about whether ASERL's j-retain title list would likely grow over time. Many indicated they expected to continue to add titles they will retain, as well as use the list to weed their print journal collections.

Amy Wood asked to get test records from JRNL to determine compatibility with PAPR.

There was discussion whether items being discarded via the JRNL database could be used to fill gaps in the JStor collections held at CRL, Harvard, CDL, etc. Winston will include this on his list of possible enhancements for the future.

Focused Retention – Status of Ag-Journals effort. John Burger

John Burger noted that Agriculture Journal project has been slow in starting. Virginia Tech indicated they had submitted a list of titles, NC State has as well – Cheryle will re-verify the title list for this project. There was a desire to confirm titles in time for the anniversary of Morrill Act, but the Steering Committee acknowledged that long-term projects such as this can fall down low on their local to-do lists.

Focused Retention: Can we create complete runs of Chem Abstracts, Thomas Register, NUC, NYT Index, etc? University of Memphis is retaining NUC and NYT Index. East Carolina is retaining NUC as well. Duke is retaining Chem Abstracts and will retain NUC as well. Alabama indicated they would likely retain NUC as well.

Previously the Steering Committee had agreed to exclude indices from the j-retain title list. There was discussion that indices are used differently than serials, so there may be a desire to keep more print copies. Cheryle will analyze the original contributions list and determine what indices had been

removed. The group agreed to focus on the following as an initial set of indices for retention within the group: *NUC, NYT Index, Chem Abstracts, London Times, Thomas Register*.

Open Mic / Desires & Interests for Future Development – Full Group

The group agreed to offer webinars for participating libraries to describe their facilities and their collection, storage conditions, service implications, etc.

There was discussion of how libraries are handling their discards. Options available vary by area/institution. Some are using BetterWorld Books, some contacted local recycling department on campus. Virginia Tech won a “recycle mania” title last year for most pounds of recycled materials. Some libraries have gone through their city recycling facilities but had to remove covers. Virginia Tech created a short two-page paper on preservation/digital activities to provide to those who expressed a concern with discards/shredding.

There was discussion about retained materials being held on open shelves. Most Steering Committee members felt this was not secure enough for the content to be relied upon as a trusted source for the future.

Adjournment: John Burger adjourned the meeting at 2:05pm.

J-Retain Program Work Day

February 12, 2013

Participant List:

Center for Research Libraries (CRL)	Marie	Waltz
Center for Research Libraries (CRL)	Amy	Wood
College of William and Mary	Jean	Sibley
Duke University	Cheryl	Thomas
East Carolina University	Joseph	Thomas
Emory	Lars	Meyer
Georgia Tech	Jeff	Carrico
Georgia Tech	Mary-Frances	Hansard
UNC Chapel Hill	Kurt	Blythe
UNC Greensboro	Kathy	Crowe
University of Alabama	Millie	Jackson
University of Central Florida	Frank	Allen
University of Florida	Diane	Bruxvoort
University of Florida	Winston	Harris
University of Kentucky	Mary Beth	Thomson
University of Memphis	Steve	Knowlton
University of Miami	John	Renaud
University of Mississippi	Ryan	Johnson
University of Virginia	Carla	Lee
Virginia Tech	Connie	Stovall
Wake Forest University	Carol	Cramer
Washington Research Library Consortium (WRLC)	Bruce	Hulse
Washington Research Library Consortium (WRLC)	Mark	Jacobs

Conference Call participants:

Nadine	Elero	Auburn
Gary	Geer	University of South Carolina
Molly	Royse	University of Tennessee

Not Attending:

Clemson
LSU
Mississippi State
Tulane
University of Louisville
Vanderbilt
Virginia Commonwealth