6-7-2013

Pulling Back the Drapes: How to Use Excel and Access to Provide Information for a Package Review

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PULLING BACK THE DRAPES

How to Use Excel and Access to provide critical information for a package review
Background

University of Kentucky Libraries facing substantial budget cuts for two years

UK Administration critical of “packages” of e-journals

Our Wiley/Blackwell contract with ESIG was coming up for renewal in FY14.
We needed to identify unsubscribed titles that are high use and core to our collection which would be lost if we went only with the subscribed titles.

We needed to determine exactly how valuable this package was in order to present a case for retaining in the face of budget cuts.
Time Frame

- Establish criteria (August/September)
- Prep spreadsheet (September/October)
- Initial Meeting (Early November)
- Evaluation (November/December)
- Turn in core and non core (December)
- Collection Management evaluate results (December/January)
Factors for Collection Managers

- Is it a subscribed or non-subscribed?
- Is it core to my discipline, college, department?
- Is it used for research, teaching, faculty publishing?
- Do we have access by another means to this title?
Collections Objectives

- Identify what titles are core or not?
- Is the package price effective and can we demonstrate this to Administration?
- What changes would have to make to keep core and high use titles?
Sources of Information

- Voyager Acquisitions – (funds & prices)
- Counter reports – Usage statistics
- Title list (subscribed/non-subscribed)
- Vendor current price list
- Vendor title list (subjects, societies and impact factor)
Challenge

Can we create a single source such as an Excel spreadsheet that pulls all of this data into one spot for the collection managers?
Skill Set of Acquisitions

🌟 Some Excel expertise
   – Sort, find, filter,

🌟 Some basic Access skills
   – Import excel spreadsheets to create tables
   – Basic table joins
   – Export the information back out into Excel

🌟 Pull the usage statistics
Behind the Drapes

- Pulled the relevant spreadsheets
- Import them into Access as tables
- Joined the Tables usually 2 at time
- Used Wiley Code, Voyager PO number, ISSN as match points for joins
- Export results into Excel spreadsheet
- Tweaking for individual titles as needed
Process - Title list

- EBSCOnet list has Wiley title code and EBSCO title number
- Voyager has list of what we paid for and which funds and EBSCO title number
- Combined the two spreadsheets using Access
- Double checked the results
**Process – Add Wiley title info**

- Wiley title list pulled out critical fields
  - Title, ISSN, Subjects, Society, Impact Factor
- Combined with EBSCO/Voyager list
- Added Usages statistics from 2010 and 2011
- Added prices for non subscribed titles from Wiley price list
Problems in Spreadsheet

- Wiley subjects did not always match with assigned funds.
  - Opted to use fund first, then subjects
- Some titles were assigned to the wrong collection manager
  - Changed and notified all parties
- Transfers, title changes and package changes
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Conclusions

Package was valuable and if we lost the package we would lose access to core titles

Identified some subscribed and unsubscribed titles that should be swapped

This was a valuable exercise for the collection managers
Contact Information

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