

Procedure for Acquisition and Maintenance of Digital Resources

Two major activities in establishing access to digital resources are taking place simultaneously: 1) ordering titles not already owned by the library, and, 2) establishing access to the online version of serial titles we already purchase in print. Many of the activities involved in these two types of work are the same. Trying to keep these procedures in chronological order, the document will begin by describing the steps necessary for a new title. After “Decision to Purchase” and “Order”, the subsequent sections apply to both activities.

Decision to Purchase

Digital resources are purchased under a variety of scenarios that include selections of relatively low cost discipline-specific resources by individual librarians and higher cost or cross-disciplinary resources requiring broader review.

- **Lower cost discipline-specific resources:** Generally available through serial subscriptions, librarians may select these resources individually using the selection criteria in the Library's established *Guidelines for Selecting Digital Library Resources*, submitting orders with license and access information to the Associate Dean for Collections. Once approved, these are forwarded to the Bibliographic Services Department and handled as permanent transfers from book funds to digital serials.
- **Higher cost or cross-disciplinary resources:** Requests for higher cost (generally more than \$500) digital serials are reviewed by the Library's Selection Committee for Electronic Databases (SCED), which oversees the distribution of budget increases for these types of resources. Requests for higher-cost "monographic" digital resources, i.e., those available with one-time payments for ownership of content are reviewed along with other one-time big expense items by the Collection Coordinators (chief bibliographers) group.

Orders

Orders for digital resources originating from either individual bibliographers or the SCED come through the Associate Dean for Collections to the Serials & Electronic Resources unit in Bibliographic Services. A digital monograph with annually recurring access charges resembles a serial in acquisitions terms and must be handled as an ongoing order. Pertinent information regarding this order will be accessible in Voyager, but accompanying information is filed in the serials unit's paper file.

License Agreement

License conditions are considered as a factor in the selection process and reviewed with special points noted, e.g., interlibrary loan terms, and the necessity of providing access to walk-in library users upon purchase. The document itself is typically downloaded and printed by serials staff and given to the Associate Dean for Collections to review and sign. In some cases, the associate dean may consult with the dean or others before signing the document. A file of license agreements will be maintained by serials staff with the goal of keeping these updated when changes occur or when new licenses are negotiated. Communicating with vendors about orders, related clerical duties and record-keeping will be done by serials staff.

Registration

Registering for access to online versions of serial titles and other digital products is the responsibility the Serials & Electronic Resources unit in Bibliographic Services. In addition to the process of downloading the license agreement, this often requires filling out online and/or paper forms, e-mail verification, faxing, phoning, etc., and this process has not yet been standardized across the publishing industry. To ensure continuity in our library over the coming years, a generic e-mail address has been defined which may be given out to vendors. As changes occur in the staff, that address can be redefined to the appropriate individual. When serials staff establish new access, they will send e-mail notification simultaneously to cataloging staff and the Digital Services Department, including the title, URL, and the publisher.

Payment

Invoices will be processed in Voyager by serials staff for items they order. Multidisciplinary digital titles are usually paid out of the "General Digital Ser" fund, which is a reporting fund under the allocated "Digital Serial Allocation" parent fund. All of the individual disciplines are represented with reporting funds under this allocated fund. The purpose of this parent fund (which is a subset of the Serials Summary) is to allow bibliographers to specify the discipline of a new digital title when appropriate and to track expenditures by discipline fund code. Over time, the entire collection of digital titles will be reviewed for fund assignment and our ability to track expenditures by discipline will be enhanced.

Cataloging

Normally, by the time the Cataloging unit in Bibliographic Services is notified of the need to catalog a digital resource, access to it should already be working properly. But it is the cataloger's responsibility to verify that the access actually functions on the date the cataloging is done, checking both the cataloging module and the local catalog, before finalizing his or her work. If multiple URLs are usable to access a title, Cataloging decides which one is the most efficient one to use in the catalog record. In some cases, multiple URLs may be necessary in the record, if different years of the serial are actually accessible through different arrangements. The library presently employs the technique of expressing holdings for print and digital versions of a serial, when both are held in the library, in association with the bibliographic record representing the paper version. When a serial is available to Tulane users in the online version only, i.e., there are no paper holdings, the bibliographic record used will represent the online version.

Internet Access

The Digital Services Department establishes and maintains access to digital resources on the library web site and is notified by serials staff that a resource is ready to be linked. If the resource is part of an aggregator, or multi-title resource, it is added to the appropriate Digital Resources web page(s). Technology Services is informed of any new resources if they need to be added to the proxy server. Any significant additions or changes are announced on the HTML-L listserv.

Maintenance | Troubleshooting

Problems with digital resources should be reported to the Digital Services Department, which determines if problem are technical or related to subscription issues. If the problem is technical, Digital Services will be responsible for remedying the situation. If the problem has to do with the subscription, then it will be referred on to serials staff.

Ongoing Monitoring of Access from the Catalog

As a part of their bibliographic maintenance activities, Cataloging is responsible for attempting to keep the URLs in bibliographic records accurate and current. Initial runs of the Voyager 856 field verification report were not helpful, but retrying this report is a possibility. Nonfunctioning URLs in a bibliographic record should be reported to cataloging staff.

February 5, 2002

Based on the conclusions of a Digital Resources Task Group

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