Big ideas. Real-world thinking.
To begin, please let me thank ERMN for this opportunity to share our work. We are a team from Minnesota State University, Mankato, a regional public access university with about 14,000 full-year-equivalent students.

We recognize that it’s not always possible to follow along with a presentation, so we’ve also linked a version of this presentation here, and you’ll see the URL at the footer of this slide and the next few slides.
Local Dakota Land Map — downloadable visual and audio Dakota land maps of Minneapolis, St. Paul, and surrounding areas by local artist Marlena Myles

Why Treaties Matter — a comprehensive and thoughtful exploration of treaties and land theft in Minnesota. For our area, we recommend you begin by reading about the 1837 land cession treaties with the Ojibwe and Dakota, and the 1851 Dakota land cession treaties

Credit: https://ias.umn.edu/about/ias-land-acknowledgement

Please let me also take this opportunity to recognize that we live, work, and learn in the homeland of the Dakota people, and whose language frames our name—Minnesota State University, Mankato.
We’ll be talking today about our iterative and ongoing project to create and maintain post cancellation access collections, and to use the data from these collections to develop reports to inform other library functions.
But before moving on, please allow me to clarify the terminology. Post cancellation access rights, or PCA rights, are sometimes also referred to as post termination access rights, or PTA rights, and for a long time these rights were referred to as Perpetual Access rights. Whatever the terminology, we feel it is very important to manage these rights actively and explicitly as collections, and we’ll explain some of our reasoning throughout this presentation.
PCA rights are rights to access previously purchased subscription years after the termination of a subscription. These rights are most typically defined contractually and can vary in terms of access type. In our library, we only count vendor platform access rights as true PCA rights, with or without a small ongoing maintenance fee. We consider flatfile access rights, for example through CDs, DVDs, hard drives, etc., to be impractical, so we don’t count these rights, and we don’t currently utilize either Portico or a LOCKSS box, so we don’t count access rights which depend on these venues as true PCA rights either.
We began developing PCA rights collections in about 2016. I want to acknowledge here that Zorian Sasyk contributed to some of the early thinking about the possible value of these collections before he left our library for another. There was an initial, significant effort first to gather information from vendors and to implement collections,
We began developing PCA rights collections in about 2016. I want to acknowledge here that Zorian Sasyk contributed to some of the early thinking about the possible value of these collections before he left our library for another. There was an initial, significant effort first to gather information from vendors and to implement collections, second, to utilize the data in our reports, and third, to pursue projects applying the information from the reports, all of which occurred over the past several years. For this year, we decided to review and update our collections, which led us to realize that it might be useful to others if we offered a presentation on this project.
Our team will take turns presenting. Pat Lienemann will provide an overview about the usefulness of PCA rights and related issues. Annalis Luck will demonstrate the process and procedures for setting up PCA collections in Alma. I’ll return at the end to describe some reports and applications which utilize PCA collections data. So, without further adieu, here is Pat Lienemann.
Project overview:

Thanks Nat

Before I start discussing the usefulness of what we do, I think it’d help to give a quick overview of the project. Annalis will cover the Alma process in more detail next, but generally what we are doing is:

1) Identifying which licenses provide for permanent access of materials,
2) Obtaining entitlement lists from those vendor, and
3) Creating and activating two collections:
   1) a Current Package Access Collection (all materials that are licensed during the license period)
   2) PCA Rights Collection (the permanently licensed materials)

[Taylor & Francis Alma screenshot as an example]

So there are two collections in this screenshot.

- The current package list (which is the first entry in this image) is built based off the most recently negotiated license – the entitlement list and Alma collection are reconciled & this collection is created (which in turn provides our users with a custom collection of our licensed materials).
- And then the PCA collection (which is the second/bottom image) is a cumulative inventory created based on the identified PCA materials.

[CLICK MOUSE]

You’ll notice that the Annual Collection has a smaller portfolio list compared to the permanent collection. So even though we may have to pair down the title list during the annual renewal process, we still have this accumulation of valuable content for our users.

I’d like to remind you of that classic Electronic Resource idiom: ‘Titles may fall in and out of collections, but PCA rights are forever.’
Benefits of having both types of collections

1. Maintain collection awareness
2. Identify long-term resources
3. Workflow benefits
4. Reporting possibilities

There are multiple benefits to setting up both of these collections in Alma:

1. Maintain collection awareness
   1. Just knowing about the existence of PCA rights isn’t enough to be useful. It’s like generally knowing your job offers some great fringe benefits but you never take the time to figure out what they all entail [and then you miss out on all those great cardigan sweater discounts].

2. Identify long-term resources
   1. As the movement around Open Educational Resources (OER) hopefully grows & more instructors adopt these practices, the library is in a great position to be a part of this. [That is if all the factors align – outreach, instruction, competence, etc.]. Teaching faculty would be able to confidently select course readings by choosing materials out of the PCA Rights Collection. This would lessen potential stress or confusion when a syllabus links to not currently licensed content.

3. Workflow benefits
   1. If you are going to utilize PCA collections in your institution (especially after a cancellation – which often happens at a bad time of the year for many of us - either in the middle of summer or in-between semesters), we see a benefit to creating these collections at the beginning of the collection’s lifecycle and then the on-going management is a smaller aspect of the project.

4. Also useful for their contribution to reports
   1. These PCA rights collections contribute to our ability to analyze our collection as a whole, which is something Nat will cover more a little later.

The image is the Online Access Options from a Primo record: for simplicity, let’s call it, Journal X.
Perpetual Access coverage is different from Current coverage in most cases, so it is essential to be able to differentiate the two when making decisions, and also to be able to act on the difference quickly.

As an example let’s return to the access options for *Journal X*.

- You can see that the PCA Rights Collection starts being available from 2006 and continues (which is likely the year we first started licensing the journal, or at least the first year we were able to secure PCA rights).
- We also maintain current access through that second collection (the T&F Social Science & Humanities Library 2021). Like many vendors, for this title, T&F throws-in access to content back to 1/1/1997 as part of the deal. If we were to cancel this package, we’d lose access to all that bonus and any non-PCA material in this collection.

Image (CC BY-NC-SA 2.0)
akahawkeyefan
https://www.flickr.com/photos/dclmeyer/42274866444
So as inflation and prices perpetually increase (and our budgets perpetually...do not), library workers often need to make tough decisions on how to manage that budget.

Often it comes down to cutting positions or materials and neither are good options for our users. But maybe you have a great grasp on title usage & PCA rights, and at the last moment, you finally hear that the decision is made to cut the materials instead of the people.

Nat had an example of this happening at Mankato before I started – the decision to cut was made but the PCA rights still needed to be gathered (and it was time-consuming at an already busy time). So it wasn’t a great project for the library...

However, if these permanent collections are being proactively managed (and by the Access people in our library instead of Acquisition people), the division of labor is better and is more easily actionable.
Simple deactivation process

If you are staying on top of managing these collections, it’s a pretty simple thing to make Alma reflect any of these cancellations. Say our institution decided to end the package at the end of 2021.

1) We would just ‘cap’ the coverage in the PCA collection (and Annalis will talk a little bit more about the mechanics of editing these collections)

2) And then we just delete the “current” collection.

Obviously, we’d want do outreach with our effected departments, but if we made some savvy decisions, those PCA rights may be providing a lot of value to our users and they might not even notice much of a difference.
Related & Tangential Info
(stuff we know now or do now, but has not previously been part of the PCA Rights project, so it could lead to changes in the project)

Somewhat related, tomorrow morning, another group of Mankato librarians will be speaking about an Alma Licensing project we’ve been working on. One of the license terms we track is our perpetual rights – we have two fields for it:
1) do we have rights?
2) And then copy & paste the pertinent sections.

Through referencing our Alma license work, I was able to quickly narrow down which licenses provided for PCA rights when we started round 2 of the project this academic year. We haven’t fully integrated these two projects yet, so we do have more to explore.
PCA Rights can come in several different forms – like Nat said during the intro, some of the “technically PCA rights” that are available through licenses aren’t always useful to our setup. But we do see (and value) terms like these in the above screenshots.
PCA Rights - examples

Some are more complicated than others ranging from a simple sentence to multiple paragraphs or even addendum.
Finally, the saddest (or at least, the least useful for our users) PCA Rights entry: No.
Further Alma Functionality

Also, I want to point out the Alma functionality to track Perpetual access type at the collection and portfolio levels. We currently have this implemented at the collection level, but our current understanding is that we don’t gain real functional or reporting value from the field. But it’s something that we’ll continue to look at as we move forward with the project.

Thank you for your time, up next is our colleague Annalis, who will be able to provide more detail on the actual Alma mechanics of this project.
Let’s discuss Process and Procedures. First and foremost, it’s important to recognize that this process can differ based on your institutional needs. For the sake of clarity, I want to be clear that this is how we do this process.
1. Acquire an entitlement list from the vendor.
   1. Pull from an administration account
   2. Contact vendor
   NOTE: Entitlement reports can vary from vendor to vendor. Be sure to familiarize yourself with individual reports.

2. Compile PCA titles into an upload-able spreadsheet.
   1. Alma needs a specific template. That can be found on Ex Libris’s website here: https://knowledge.exlibrisgroup.com/@api/deki/files/108723/Portfolio_Loader_Template_August_2019.xlsx?revision=1
   2. At minimum, you MUST include an ISSN as this is what is used to match a title to the Community Zone (more on this to come). Be sure to consider additional information such as coverage.

To start, I recommend that you pull an entitlement report for the vendor that you are working with. We will pull this report from our administration accounts typically but do know that you can always reach out to the vendor directly as well. Once you obtain this list, take some time to familiarize yourself with the report. Some vendors will include open access titles in these reports and it’s a good idea to filter those titles out so they do not end up in your PCA collection.

If you are working with a large amount of titles, I recommend setting up a list you can upload into Alma using the blank template found on Ex Libris’s website – you can find a link to this template through the “Manage Electronic Resource’s documentation (https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources#Adding,2C_Updating,2C_or_Removing_Portfolio_Information_in_Bulk_Using_an_Excel_File)

If you are working with a small amount of titles, you may wish to activate the titles individually. We usually do work with a large amount of titles and therefore choose to use the portfolio uploader feature. You can see an example of this here. In this case, I have the ISSN along with journal title and coverage. (notice columns C-L are hidden – these are all blank).
3. Under Resources, select **Add Local Electronic Collection** under Create Inventory.

There are many ways you could approach this process. I have done this process in a few different ways but this is the main way I have done it. To start, we are going to create a local collection. Under the Resources menu and under Create Inventory, go ahead and click on Add Local Electronic Collection.
3. Fill out the Public name and Public Name (Override) fields with the same name. Fill out other fields as desired. Click **Save and Continue**.

Alma will walk you through the local collection set-up wizard. At minimum, fill out the public name and public name override fields with the same name. The override field is particularly important for later when we link this collection to the Community Zone. If you do not fill out the Public Name override field, the local collection’s name will change to the name of the Community Zone collection that you link this collection to later. Once you have this first page filled out, click **Save and Continue**.
5. Leave Service Activation Status for collection as **Not Available** until you are ready to make it available for access.

6. Adjust other settings in the collection as needed for your institutional needs.

7. Click the Portfolios tab and select **Load Portfolios**.

You will now be on the Electronic Service Editor page. On the activation tab, leave the service activation status as not available for now. This will help ensure that the collection won’t show up in your discovery layer until it is ready for access.

Be sure to take the time to adjust any other settings in the collection as needed for your institution. For example, you may wish to visit the linking tab to enable and select your proxy.

Next, go to the Portfolios tab and click on Load Portfolios. The initial set up we’ve done with the entitlement list will now be useful.
8. Fill out the Activation Wizard screen. Be sure to select the correct settings for what you are trying to accomplish. Click Next.

See Using Portfolio Loader for Adding, Updating or Removing Portfolio Information in Bulk for more information.

You should now be on the Activation Wizard page for file uploads. At this point in the set up of a PCA collection, the loading policy does not make much of a difference – it will, however, make a difference once the collection is associated with the CZ. We follow Ex Libris’s documentation for file uploads. In most cases, you will want to have Complete selected as this will work on linking your titles to the Community Zone once the collection is associated. Be sure to have “Add Local Portfolios” selected under Action. I will always leave “validate online” selected under Select Validation Policy as this will help provide clarity if not all of the titles in the file are uploaded.
9. The next screen in the activation Wizard will let you know what is going to happen with the titles in your file for upload. Click Load.

10. You will now see a note letting you know that your file has been submitted as a job. Once the job is completed, you’ll see a list of portfolios under the portfolios tab. You may need to refresh.

On the next step of the activation wizard, Alma will let you know what is going to happen with the information you’ve provided for upload. In this case, we can see that Alma is going to create all 7 portfolios from the information provided in the Excel file. Sometimes, you’ll find that Alma won’t create a portfolio for a title in your Excel document for some various reason. If this happens to you, you’ll see differing numbers – this is where downloading the Excel file to view information and warnings is helpful. Even if you do get differing numbers, you will still want to upload the file and use that Information and Downloads file to manually add any problem titles to your collection. Once you’ve verified everything looks good or as good as it will be, go ahead and click load.

Alma will let you know with a pop-up that the activation job has been submitted.
Example of portfolios listed after the file upload process has finished.

Once the activation job has finished loading, you will be notified through email. Once you refresh the Electronic Service Editor, you will see a list of all of the portfolios you added. Notice that all titles are Institution Zone records at this time. At this point, go ahead and click on Save.
11. Once you see a list of portfolios, go ahead and click **Save**. You should now be on the Electronic Collection Editor. Adjust any settings as needed based on your institutional needs.

![Electronic Collection Editor](image)

After clicking save, you will be brought to the Electronic Collection Editor. The Electronic Collection Editor is another area where you’ll need to adjust settings based on your institutional needs. We take the opportunity to adjust proxy settings as needed.

On the General Tab in this section, you may find it useful to mark the access type as perpetual – this can be a helpful indication if you run reports like Nat will describe later on in this presentation. Go ahead and click Save.
12. Identify a collection to link to that’s in the Community Zone.

Tips for identifying an ideal collection:

• Make sure the Interface Name matches the name of the vendor that you are working with.
• Stay away from CZ collections that were designed for specific packages — you want a collection that is all encompassing of what a vendor provides for journal content. Example: MIT Press Journals Arts and Humanities won’t include all journals provided by the vendor from other subject areas.
  • Ideal collections sometimes use such words like ‘All’ or ‘Complete’ in them. Sometimes they are simply the vendor name and the word “Journals” Example: MIT Press Journals.
• Make sure the collection has portfolios available as this is what your local collection will activate for access.
  • You can always look at a collections available portfolio list before deciding on it.

Next, take the time to identify a collection from the Community Zone that you can link your newly created local electronic collection to. The benefit of doing this is for the CZ to manage linking for you and to make your life easier.

Since identifying ideal collections can be tricky, I wanted to provide some tips and tricks for identifying ideal collections.

Be sure the collection’s Interface Name matches the vendor that you are working with. Stay away from collections that were designed for specific packages as you want a collection that is all encompassing of a vendor’s provided content. For example, MIT Press Journals Arts and Humanities collection will not include other journals that fall outside of the arts and humanities subject area. Ideal collections sometimes includes such words as “all” or “complete”. Sometimes vendors simply use their vendor name and the word “journals”. For example, MIT Press Journals. Some vendors will even split book and journal content into separate collections — this is ok but be sure that you are working with the desired collection.

Finally, be sure you choose a collection with portfolios available as this is what your local collection will utilize for access. Be sure to write this collection name down for later.
13. Find your newly created collection in Alma. Under the ellipses, click on Link to Community.

Now that you’ve taken the time to identify a collection from the Community Zone, we are ready to link the local electronic collection. Under the ellipses on your local electronic collection, go ahead and select Link to Community.
14. Under Community Information, click on **Select from a List**

Under the Community Information section, go ahead and click on “Select from a list”.

15. In the pop-up, search for the name of the identified CZ collection and select it by clicking on it.

In the pop-up, type in the name of the collection you’ve identified earlier in the search box. Through the list of results, find the collection in particular and click on it to select it.
16. Be sure **Yes** is selected under Bibliographic Records Configuration. Click **Link**.

Under Bibliographic Records Configuration, be sure you have “yes” selected. I recognize ISNNs are not always an ideal match point but this is what Ex Libris will use to make the connection from your file upload to the Community Zone. The records in the CZ are pretty inclusive of a title’s ISNNs and therefore there is a high chance that the appropriate connections will be made in the linking process.

Once you have everything set up, go ahead and click on “Link”.
17. Read through the pop-up and click confirm.

You will see a pop-up confirming you've successfully submitted a linking job.

After clicking “link”, you get the pop-up that you see in the upper right-hand corner. This pop-up is simply letting you know what to expect. Go ahead and read through this pop-up and click “confirm”. You will then see another pop-up that let’s you know you’ve successfully submitted a linking job. This process will take a little bit of time but you should receive an email once the process is complete.
18. Once successfully linked to the Community Zone, you’ll see the CZ symbol appear in place of the Institution Zone symbol.

19. Remember to change the status of your new PCA Rights Collection to Available under the Activation tab when complete. Click Save.

On the Portfolios tab in the Electronic Service Editor, you’ll notice the Institution Zone symbol will change to the Community Zone symbol. You may need to refresh this page after the linking job has completed to see this. Take this time to look for any titles that retain the Institution Zone symbol and manually investigate those titles. By investigating, I mean that you’ll likely have to manually activate them from the Community Zone. When a title doesn’t connect, it either does not exist in the CZ collection OR the CZ record does not have the ISSN you entered in the file upload. Go ahead and activate any missed titles from the CZ and remove the local portfolio. For any titles that have to remain local, be sure you add an access URL for your patrons.

Finally, you will need to remember to change the status of your new PCA Rights Collection to available. Go to the activation tab and select available. Go ahead and click on Save. These titles will now be available to your patrons through your discovery layer.
Thanks, Annalis. Okay, so I’m back to talk about some of the value we gain from PCA collections for reports, especially for Collection Development purposes. I’ll also provide a very quick overview of the steps to gather and process the data. My goal is for you to get a sense of how helpful the data can be.
First off, let me apologize if it’s not easy to see the tiny table on the screen. Please download the presentation at the provided link if it will be helpful to you. It should be noted that none of the pictures of tables here should be necessary to understand the narrative.

What we’re looking at here is a snip from the base report we call the Collection Review, or CR. Journal title-level coverage analysis – and the nuanced overlap analysis made possible – is one of the key values we’ve gained from the PCA collections.
But let me back up. I feel like I should provide some orientation on Mankato’s reports, although I’m afraid anything I say here won’t be satisfactory. We have presented to ER&L and NASIG on various reports or aspects of our reports, so if you have any interest, maybe some citations could be useful, but it’s easiest just to go to our university institutional repository, called Cornerstone.
Today, I'll be showing just a few snips of just one report, the Collection Review report. This report includes all of the journals we get through individual journals subscriptions or journals packages, including subscribed journals and open access journals, if the publishers of the packages provide any open access journals.
This set of reports is then matched to about a dozen or so data sources, as well as some special tables, such as (1) Provider Category, which helps us distinguish coverage based on holdings types, (2) a table called the local table for retaining comments about specific journals ...
And, most recently, (3) a map of Dewey Decimal numbers to LC numbers and Mankato colleges, which capacitates a new approach in which we use Alma ER call number for subject analysis.
The actual CR report includes nearly 13,000 rows and over 150 columns of variables, as a starting point for further calculations, data visualizations, and other derivations. This is called a base report because we actually use reports like this one as the basis for other reports. This is just a massive table and it can be unwieldy. It’s actually difficult just to talk about what’s in the base report. In order to demonstrate the size of the table, a list of the base variables is included on the screen – the point here is to demonstrate the unwieldiness of the table, because of its size.
For outreach purposes, or collection evaluation, such as accreditation reviews, we would provide data visualizations constructed on top of the base report, most often as a one or two sheeter. Pat is one of our key developers of data visualizations and he is particularly good with Tableau. We also use data viz automatically generated in Jupyter Notebook and exported to Excel. For example, the plot on the screen is from a subject report for Nursing. Roughly speaking, it provides a sense of how many journals, of what quality, are provided by the library, for a given subject.
So now, let’s return to the PCA coverage data, which is just one data point, but it’s especially useful. For coverage analysis purposes, aside from post cancellation access coverage,
we break out how many distinct venues and how many distinct platforms provide access to a journal,
then we also break out coverage from subscriptions,
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ELM resources,
And print serials.
Because this coverage information sits alongside cost, usage, and citation-based journal quality information, and is subject sliceable, either using ScImago subjects or Alma community zone call numbers, a number of applications are capacitated.
Last year, in pursuit of some library space planning goals on a fairly short time-frame, we pursued a periodicals weeding project using an earlier iteration of the CR report. On the basis of this report, we were able to generate coverage analyzed lists of journals for weeding review very quickly, which was good because I didn’t have any spare time, and these lists could be, and were, customized based on college feedback. So, for example, although we limited weeding to print overlapped by PCA coverage for most colleges, our College of Business aggressively weeded almost everything with any electronic overlap.
The PCA coverage data has also contributed to cancellation and one-time purchase decision-making. Because we include ILL, J2 Turnaways, and J4 year-of-publication usage data alongside all of the other information in the Collection Review report, we can make optimized decisions about journal backfile purchases, although, to be honest, if we make any backfile purchases in the next few years, they will be focused on buying out JSTOR collections, in order to reduce future recurring expenditures.
I’m sure you can imagine as many or more potential applications of the PCA coverage data as we have. Instead of belaboring the possibilities, please allow me to demonstrate very quickly how we get the data out of Alma.

Basically, I just extract all of the coverage data from one report in Alma Analytics.
The construction of the report is very simple, because what I want is just a big list of all active journals. The filters can be important, but the field selection is probably idiosyncratic.
For coverage analysis, a few fields are key. I definitely need the collection name, including the custom collection name provided by Annalis. In my current implementation, I have mapped these names to provider categories, such as subscription, aggregator, ELM, and so on, although, for PCA coverage only, I could probably just use the field Electronic Collection Access Type.
The one real trick is to convert the coverage data from Alma to a simpler form, so that I can line all of my data up in the base report, one row per journal. Here you can see the analytics data already processed in Excel. It takes about 15 minutes to convert the coverage data to a more useful form using a semi-automated approach. Basically, what I need to do is extract start and end years from the Coverage Information Combined field, and to apply any embargoes.
Currently, I do this work in Excel using two custom VBA functions, which extract the information I need. The VBA functions are actually quite simple and I didn’t even write them – I just tweaked some programming I found online.

There are a few more steps to handle multiple coverages in the Coverage Information Combined field, and to handles embargoes, but really, these simple functions are currently the key to the process, although I’ve gone through other approaches.
And that’s it! Or not really – but the basics for PCA coverage analysis are right there. For PCA coverage analysis, at least, all I need to know are the PCA collection names, then I map them to provider categories and extract the coverage information itself. The rest is just data matching at the journals level. By the way, the screen currently shows a snip from my documentation for processing ER Holdings.
I could talk about why I prefer to do this data processing in Excel, because there are other good options, but that’s a different presentation. Generally speaking, there are many, many more ways to wrangle the underlying collections data for applications – it would also be possible to create a more finished report within Alma Analytics itself. If you’re not as familiar with Excel or VBA, or Python or other tools for that matter, you shouldn’t be daunted from considering how you could make similar use of underlying collections data. If you’re already wrangling the underlying collections data in some other way, I’d also like to hear from you, as I’m always interested in learning other approaches and I’m also always willing to meet to explore new possibilities. Or maybe I shouldn’t put the focus on the tools or the data wrangling – I’m always interested in talking about the applications of the information, too, because that’s the point, after all, so feel free to contact me, or any of us, for that matter...
Thank you!

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