

TO (RE)FRAME IT, NAME IT: REFINING SPENDING CODES TO REVEAL NEW COLLECTION TRENDS

CONTEXT, CONSIDERATIONS, CONSTRAINTS

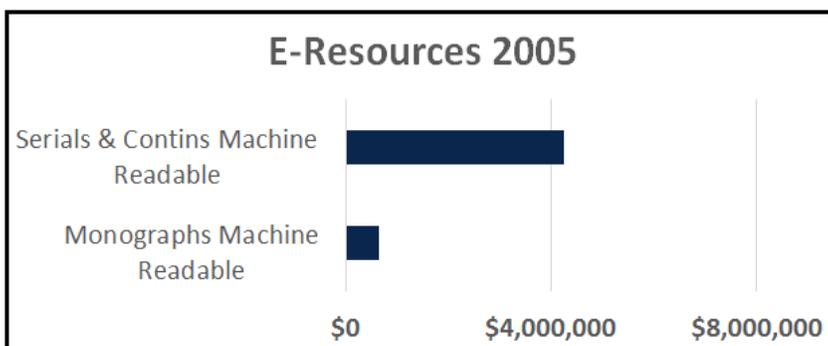
The expenditure codes presented and discussed here are a subset of the university's expenditure code set.

These expenditure codes are therefore in both the Voyager integrated library system and Oracle, the university's financial system.

Oracle—the authoritative source for library expenditure data—does not include the bibliographic level of detail available in Voyager.

The library's expenditure code set therefore must be designed to fit within the university's code set *and* to include enough information to enable effective reporting over time.

PAST (BEFORE FY13): GROWTH OF “E,” BUT “E-WHAT”?



Expenditure codes for “machine-readable” (later, “electronic”) resources came in two flavors.

Resources such as ARTstor, RefWorks, and SimplyMap were coded as “serials.” The ebrary Academic Complete ebook subscription package was coded as “serial.”

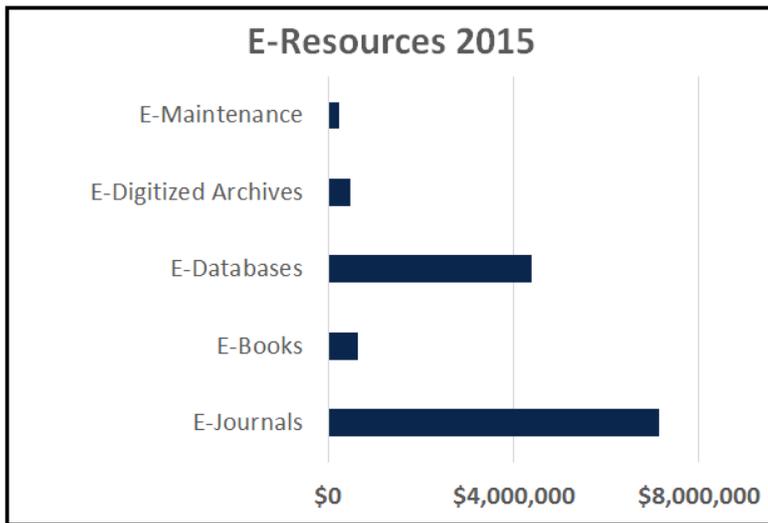
Historical newspaper archives were sometimes coded as “monographs” (rationale: expenditure is one-time, the collection is sold as a single unit) or as “serials” (rationale: “newspaper” = “serial” or “database” or “not an e-book”).

While these expenditure codes showed the growth of e-resources at Yale Library, they oversimplified the details of that growth.

It was easy to think that “serials” always meant “e-journals,” and from there to make the mental leap that spending on STM journals was crowding out other disciplines and formats in the library's collection budget.

PRESENT (FY13-FY17): EVERY NEW EXPENDITURE CODE TELLS A STORY

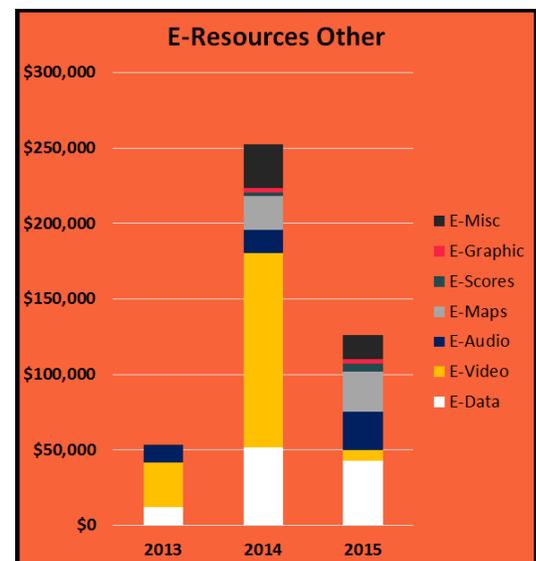
While e-journals still dominate, we now see other significant e-resource expenditures.



E-Digitized Archives are often one-time perpetual access purchases of primary source material, typically relevant to Humanities & Arts. Training and documentation are necessary so that staff can consistently distinguish this category from **E-Databases**.

Now that **E-Maintenance Fees** are untangled from “serials,” we can better manage and negotiate those fees.

Codes such as **E-Audio**, **E-Video**, and **E-Data** reveal the growth of collection expenditures in these formats.



FUTURE (FY18-): NOTHING ENDURES BUT CHANGE AND MICROFORMS

Workday Financials will replace Oracle eBusiness at Yale on July 1, 2017, prompting a fresh review of collection expenditure codes.

Some of the expenditure codes introduced in FY13 average less than \$100,000 in spending each year. Those codes are candidates for consolidation. For example:

- **E-Maps**, which has been primarily used for geospatial data, may be consolidated into **E-Data Files**.
- **E-Music Scores** will likely be consolidated into **E-Materials Other**. To reveal what’s in the **E-Materials Other** code, Workday reports will need to be supplemented with Voyager/ILS bibliographic details.