Transfer Workflow

Scope:

Contact: Bethany Blankenmeyer

Unit: Continuing Resource Acquisitions

Date last reviewed: 05/01/2018

Transfer Workflow

Below is the typical Continuing Resource Acquisitions Department workflow for processing journal titles that transfer from one publisher to another. Workflows are separated based on if the transfer is a print only title, if the title has allocated funding, or if it is an unallocated funding transfer. Many of the steps may not occur in the order in which they are listed below due to context around each individual transfer.

Print Only Transfer

1. Transfer Coordinator receives notice of transfer title.
2. Transfer Coordinator creates new Trello card using the Print Only Transfer Template, and includes the following information in the description:
   a. Transferring from:
   b. Transferring to:
   c. Source:
   d. Order number:
   e. Effective date:
   f. Notes:
3. Transfer Coordinator moves the card to the Pending column and adds the Order Creator to the card.
4. Order Creator adds a note to the order record.
5. Order Creator moves the card to the appropriate fiscal year completed.

Allocated Funding Transfer

1. Transfer Coordinator receives notice of transfer title.
2. Transfer Coordinator creates new Trello card using the Allocated Funding Transfer Template, and includes the following information in the description:
   a. Transferring from:
   b. Transferring to:
   c. Source:
   d. Order number:
   e. Effective date:
   f. Old coverage dates:
   g. New coverage dates:
   h. Notes:
3. Transfer Coordinator adds the due date for effective date of transfer.
4. Transfer Coordinator adds Order Creator to the card and moves card to In Process column.
5. Order Creator adds a note to the order record.
6. If revend or format change, Order Creator starts a new card on Vendor and Format Changes Trello board, moves the card to the appropriate FY Completed Transfers list, and deletes Access Confirmer checklist.
7. If not a revend or format change, Order Creator adds Access Confirmer to card and moves it to Awaiting Access list.
8. Access Confirmer confirms frontfile and backfile policy for the new publisher. For help, you can view information on the spreadsheet “Journals_CoverageDates_CheatSheet” at L:\Departments\ContinuingResourceAcquisitions\CRA\Publishers. For instance, titles on the Oxford website have a frontfile of 1996 – Present (backfile is earlier content).
   * Not all publishers have front and backfiles. In these cases, the frontfile is “All with current.” The backfile is “n/a.”
• If no frontfile information is available, contact publisher rep or sales support.

**Transferring From:** JSTOR  
**Transferring To:** Project MUSE  
**Source:** JSTOR  
**Order number:** 271624  
**Issue/Volume Effective:**  
**Effective Date:** 1/1/21  
**Old Frontfile Coverage Dates:** 2005-Present  
**New Frontfile Coverage Dates:** All with current.  
**Old Backfile Coverage Dates:** 10/01/1962 to 07/31/2012  
**New Backfile Coverage Dates:** n/a

9. Access Confirmer confirms access from new publisher  
   a. Search the Ex Libris Client Center using the e-Catalog search.  
   i. Use the category “Journal” and either the “Title Begins With”, “ISSN Equals”, or “Title Equals” search function to find and open the title in Ex Libris.  
   b. Click the link for the proper holding for the ejournal based on publisher and/or package subscription.  
   c. Click the URL for this holding in Ex Libris and confirm that we have access to the correct amount of content based on the coverage date listed in Trello. Spot-check access by opening one full text article (PDF, or HTML file if PDF is unavailable) of the newest and oldest subscribed issue.  
   d. If correct access is unavailable, contact the vendor or new publisher of the journal.  
      • To find the vendor or publisher information:  
         ◦ Copy the journal’s order number from the Trello Transfers board.

**Transferring From:** JSTOR  
**Transferring To:** Project MUSE  
**Source:** JSTOR  
**Order number:** 271624  
**Issue/Volume Effective:**  
**Effective Date:** 1/1/21  
**Old Frontfile Coverage Dates:** 2005-Present  
**New Frontfile Coverage Dates:** All with current.  
**Old Backfile Coverage Dates:** 10/01/1962 to 07/31/2012  
**New Backfile Coverage Dates:** n/a

◊ Look up the order number in the Aleph Acquisitions module.  
◊ If the name under the heading "Vendor" is one of our 2 vendors,
ask one of the following contacts via email to restore access. Contact information can be found in FOLIO Organizations tab.
- EBSCO
- Harrassowitz
- If the name under the heading “Vendor” is a publisher, ask our provider contact via email to restore access. Find the contact information in the FOLIO Organizations tab. If we do not have a contact, email the publisher’s customer service department.

10. Access Confirmer updates access in Ex Libris knowledgebase
   a. Once you have confirmed that we have the correct access, set holding to “Subscribed” in Ex Libris.
      i. Do this by clicking the “Edit” button on the top-right of the screen. Select “Subscribed” from the drop-down menu under the heading “Status” using the pull-down menu:

   ii. Click “Save”.

   b. If the Default URL and/or coverage date is incorrect in Ex Libris, add the correct Custom URL and/or coverage date.
      i. Click “Edit” in the top right corner of the Ex Libris record page.
      ii. When adding correct coverage dates, add the beginning date in the “Custom Coverage Date From” box. Add the end date in the “Custom Coverage Date To” box.
      iii. Add the correct URL in the “Custom URL” box.
      iv. Add notes in the “Public Note” box to explain the edits. Do not click the “Display” box unless it is a note for library users.

11. Access Confirmer moves card to appropriate FY Completed Transfers list.
   a. Add the Trello card to the top of the appropriate FY Complete Transfers list.

Unallocated Funding Transfer

1. Transfer Coordinator receives notice of transfer title.
2. Transfer Coordinator creates new Trello card using the Unallocated Funding Transfer Template, and includes the following information in the description:
   a. Transferring from:
   b. Transferring to:
   c. Source:
   d. Order number:
   e. Effective date:
   f. Old coverage dates:
   g. New coverage dates:
   h. Notes:
3. Transfer Coordinator adds the due date for effective date of transfer.
4. Transfer Coordinator adds Order Creator and Order Approver to the card and moves card to In Process column.
5. Order Approver confirms renewal with subject specialist and Head of Collection Strategy & Development.
6. If no renewal, Order Approver moves card to appropriate FY Nonrenewed Transfers list.
7. If renewal, Order Approver starts new card on New Periodicals/Serials Orders Trello board and moves card to appropriate FY Completed list.
8. Order Creator adds a note to the order record, if one exists.
9. Order Creator closes open order record, if one exists.