# Managing Dates in Gold Rush



### **Colorado Alliance of Research Libraries**

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# Managing Dates

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### Introduction

### **Dates and Serial Publications**

Libraries have always had to deal with a great many variations in the way publishers assign dates to their materials. The age of online, web-accessible publications has made that task even more difficult, with publishers selling access to their content based on ranges of dates. Some have chosen not to allow online access to their most recent materials, while others have offered various access packages covering differing ranges of dates. Others allow online access to various portions of their content, depending on the library's print subscriptions.

While it is difficult for a system like Gold Rush to accommodate every possible combination of these access restrictions, we've tried to provide your library with tools that will allow you to handle most of the commonly used date restrictions, and that will help you present this information to your users in a meaningful way. These new tools give you the ability to add notes about access that are displayed in Gold Rush public, and they can affect the way Gold Rush Linker builds links for your users.

#### **Dates in Goldrush**

Gold Rush stores your date information along with your holdings data. When you first add a database to your holdings, we use the default date information that comes with the provider's title list for that database. The default date information usually includes up to four dates, and sometimes includes a standard embargo period. The four possible dates are: Full Text Start date, Full Text End date, Citation Start date, and Citation End date. Other possible items are the Embargo Period, Window Period, and Date Notes.

Once you have added a database to your holdings, you can adjust the default date information to better reflect your library's access to that database. For example, if the default date information for a database does not include an embargo period, and your access to the database is limited by an embargo period, you can add that information.

Of the four possible dates, the ones Gold Rush is going to use to determine what content is accessible to your users are the Full Text Start and Full Text End dates. The Citation Start and Citation End dates are included to indicate that a database includes indexing for a much broader period than it includes in full text.

Embargo Period and Window Period are stored as an integer representing the number of months for each type of period. A value in the Embargo Period indicates that a provider does not allow access to its most recent content for some number of months. Gold Rush uses the Embargo Period to calculate your "Window of Access" by subtracting the number of months from the current day's date to determine the most recent material you can access.

A value in the Window period indicates that a provider only allows access to full text content that falls within a specific range of dates, based on today's date. In other words, full text content becomes available after a specified number of months. For example, a provider might allow access to the most recent three years of their content. This is sometimes referred to as a "rolling window." Gold Rush uses

the Window Period to calculate your "Window of Access" by subtracting the number of months from today's date to determine the earliest content you can access in that database.

If both Embargo Period and Window Period have a value, Gold Rush first calculates the end of your Window of Access using the Embargo Period. It then calculates the beginning of your Window of Access by subtracting the Window Period from the end date determined by the Embargo Period.

In addition to the start and end dates and the Embargo Period and Window Period, we've also added a Date Notes field. This allows a library to add specific notes about access to a particular database or journal title. If you add notes in this field, Gold Rush will display those notes under the dates on a full record in the public interface and in Gold Rush Linker.

All of these new settings (Full Text Start Date, Full Text End Date, Citation Start Date, Citation End Date, Embargo Period, Window Period, and Date Notes) can be edited through the Gold Rush Staff Toolbox, and can be applied either to all journals in a database or to individual journals in a database.

The public interface to Gold Rush will display the Full Text Start and End dates for full text resources and the Citation Start and End dates for indexing resources. It will also display any notes you add about the dates or additional access restrictions. If a publication is currently available, the end date will appear as "current." You can change the word "current" to some other term, like "present," or "today," through the Gold Rush Staff Toolbox.

Gold Rush Linker will use the Full Text Start and End dates, the Embargo Period, and the Window Period to calculate your "Window of Access" for a particular journal before it decides to include an article level link to a particular database.

# Why should I manage dates in Gold Rush?

Gold Rush obtains its default date information for a particular database from the vendor-supplied title lists that are loaded into the Gold Rush database. These dates reflect the overall content of the database, and may not reflect the exact dates of the content that you have purchased from the vendor.

If you purchase access to all of the content in a particular database, and the vendor applies no embargo period, you probably will not need to change the dates for that database. If, on the other hand, you have purchased access to a subset of the content in a database, or if the vendor applies more complicated access restrictions, you may need to adjust the default date information to better reflect the way you are allowed to access the content in that database.

For example, you can access titles in Elsevier's *Science Direct* through several different types of subscriptions. Your library might subscribe to individual titles in *Science Direct*. Or you might subscribe to one of the collections of titles that Elsevier offers as a package. Or, you might just receive one year of free access to an Elsevier title along with your print subscription to that journal. All of these variations can be addressed through Gold Rush's date management functions.

Gold Rush also contains a number of databases for which the publisher does not give us the dates of the content. For example, most of the journals in the title list for *ACM Digital Library* from the Association For Computing Machinery do not include dates. If you would like to give your users a better indication of what dates are covered in such a database, you can add date information for these databases as well.

# **Gold Rush Date Terminology**

#### **Full Text Start Date**

The date of the earliest content in a database that includes full text

#### **Full Text End Date**

The date of the most recent content in a database that includes full text

### **Citation Start Date**

The date of the earliest content that is indexed in a database

### **Citation End Date**

The date of the most recent content that is indexed in a database

### **Embargo Period**

A number of months for which your library cannot access a database's most recent content

#### **Window Period**

A number of months for which your library is allowed to access a database's content

### Window of Access

A time period representing the date range of the content your library is allowed to access in a particular database

# **Example Date Settings**

Database vendors apply the same types of access restrictions to databases and to individual journals within databases. You can use the "Manage Database Dates" item on the Holdings menu to apply date settings globally to all journals within a database. You can also use the "Manage Journal Dates" item on the Holdings menu in the Gold Rush Staff Toolbox to adjust date information for individual journals.

At either the database level or the journal level, you can set Full Text Start dates, Full Text End dates, Citation Start dates, Citation End dates, Embargo Periods, Window Periods, and Date Notes to reflect the exact content you have purchased access to.

The Citation Start and Citation End dates are not used in calculating your Window of Access. They can be included to indicate that a database contains indexing for a different range of dates than its full text. For the purpose of these examples, we will only use Full Text Start and End dates, even though many database vendors do include dates for their indexing.

**Note:** While the examples below refer to databases, the same types of restrictions can be applied to individual journals. Any of these examples might also be applied to individual journals, whether they are purchased as part of a larger database, or as a standalone resource.

# **Example 1 – Simple Subscription**

You have purchased access to a database and are allowed to access any of the content within that database and the database contains full text of all content and the database content begins in January of 2002. The Gold Rush Settings that would reflect this scenario are as follows:

Full Text Start: 2002-01-01 Full Text End: current

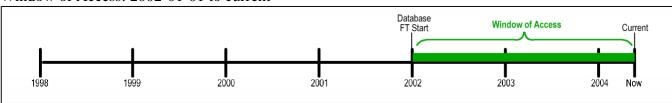
Citation Start: Citation End: Embargo Period: Window Period:

Date Notes: optional

Databases/Journals sold with these restrictions:

- •Many primary publishers like Kluwer or Taylor and Frances offer a subscription to the complete set of titles as a package deal.
- •Individual journals in many aggregations, such as EBSCO's Academic Search Premier or Business Source Premier

Window of Access: 2002-01-01 to current



# Example 2 – Subscription with Embargo Period

You have purchased access to a database and are allowed to access the full text of any content except the most recent twelve months. The database contains citations beginning in July of 1999 and full text beginning in January of 2000. The current date is July 1st, 2004. The Gold Rush Settings that would reflect this scenario are as follows:

Full Text Start: 2000-01-01

Full Text End: current

Citation Start:

Citation End: 12

Embargo Period: Window Period:

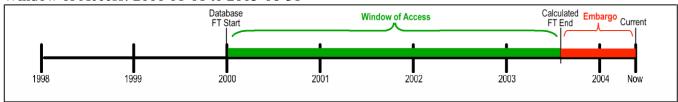
Date Notes: optional Databases/Journals sold with these restrictions:

JSTOR

•Individual journals in many aggregations, such as EBSCO's Academic Search Premier or

**Business Source Premier** 

Window of Access: 2000 01-01 to 2003-06-31



### **Example 3 – Subscription with Moving Window**

You have purchased access to a database which allows you to access the last three years of content. Their full text content begins in January of 2000, and they add new content each month. The current date is July 1<sup>st</sup>, 2004. The Gold Rush Settings that would reflect this scenario are as follows:

Full Text Start: 2000-01-01

Full Text End: current

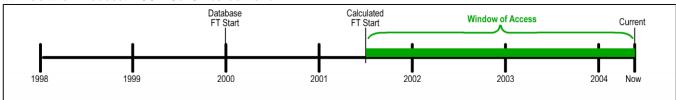
Citation Start: Citation End: Embargo Period:

Window Period: 36

Date Notes: optional Databases/Journals sold with these restrictions:

- •Elsevier Science Direct (if you receive free access to one year of content based on your print subscription)
- •Blackwell Publishing Collection

Window of Access: 2001-07-01 to current



# Example 4 – Subscription with Moving Window and Embargo Period

You have purchased access to a database and are allowed to access two years of full text, but you are not allowed to access the most recent twelve months. The current date is July 1<sup>st</sup>, 2004. The Gold Rush Settings that would reflect this scenario are as follows:

Full Text Start: 2000-01-01 Full Text End:

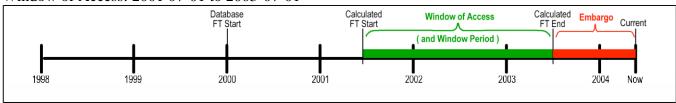
current

Citation Start: Citation End:

Embargo Period: 12 Window Period: 24 Date Notes: optional Databases/Journals sold with these restrictions:

•JSTOR Arts & Sciences I Collection

Window of Access: 2001 07-01 to 2003-07-01



### Example 5 – Subscription with a Frozen Window

You have purchased access to a database that contains a fixed set of content that covers a certain period of time (1996-06-01 through 2002-12-31). The Gold Rush Settings that would reflect this scenario are as follows:

Full Text Start: 1996-06-01

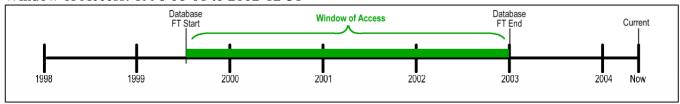
Full Text End: 2002-12-31

Citation Start: Citation End: Embargo Period: Window Period:

Date Notes: optional Databases/Journals sold with these restrictions:

- •Backfile Purchases from many vendors
- •Ceased journals or defunct databases, such as the older titles in GeoREF.

Window of Access: 1996 06-01 to 2002-12-31



# **Example 6 – Subscription with Odd Access Restrictions**

You have purchased access to a database that allows "student," or "educational," access only in evening hours and on weekends. The full text content begins in January of 2000 and the citations begin in January of 1999.

Gold Rush simply cannot calculate this one. This is a good place to use the Date Notes field to communicate the special access restrictions of this database and the journals in it. The Gold Rush Settings that would reflect this scenario are as follows:

Full Text Start: 2000-01-01 Full Text End: current

Citation Start: Citation End: Embargo Period: Window Period:

Date Notes: Accessible during evenings

and on weekends

Databases/Journals sold with these restrictions:

•Science and Technical Information Network (STN) academic accounts offered by CAS/Fiz Karlsruhe.

### **Getting Started**

Most of the Date Management functions are accessed from the Holdings menu in the Gold Rush Staff Toolbox. You can begin by accessing your Gold Rush Staff Toolbox, and clicking the "Holdings" button.

There are two new items on the Holdings menu -- "Manage Database Dates" and "Manage Journal Title Dates."

#### Database Holdings

- Add Gold Rush Database to My Holdings
- Manage Database URL's
- Full Provider/Database Table
- Remove Database from My Holdings
- Manage Database Dates

#### Journals Holdings

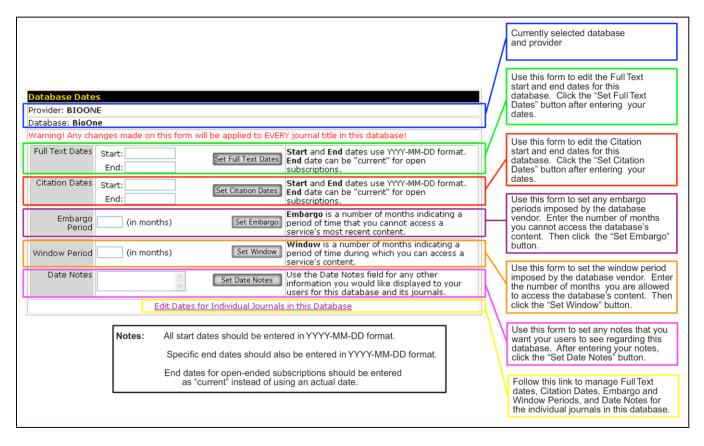
- Add Gold Rush Journal to My Holdings
- Manage Journal URL's
- Manage Journal Dates

Use the "Manage Database Dates" menu item to configure date information for all the journals in a database. Settings changed here will be applied globally to all journals within the selected database.

Use the "Manage Journal Dates" menu item to configure date information for individual journals in a database. Settings changed here will be applied only to the selected journal within the selected database. Settings changed here will not be applied to the same journal in other databases, even though you may have purchased access to this same journal in other databases.

# **Manage Database Dates**

- 1. After selecting the "Manage Database Dates" item from the Holdings menu in the Gold Rush Staff Toolbox, you'll be presented with the standard Gold Rush Provider and Database selection form.
- 2. Once you have selected a Provider and Database, you will see the Database Dates screen. This screen includes five forms that allow you to edit different parts of the date information for this database.



- Full Text Dates: You can use this form to add or edit the full text start and full text end dates for the selected database.
- Citation Dates: You can use this form to add or edit the citation, or indexing, start and end dates for the selected database.
- Embargo Period: Use this form to enter a number of months for which the vendor restricts access to the latest material in this database.
- Window Period: Use this form to enter a number of months indicating the time period during which you are allowed to access the selected database's content.
- Date Notes: You can use this form to add notes about other types of access restrictions or other helpful information you want your users to see about the selected database.

Some examples of date notes are "Accessible Only in Library," "Have your library ID Ready," or "Ask for login information at the Reference Desk."

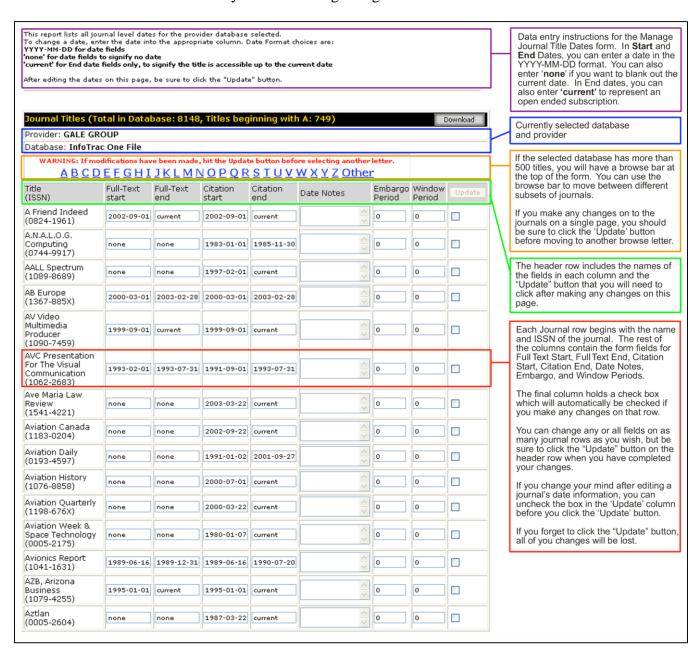
- 3. To complete your editing of Database Dates, click the button on the form you are editing. For example, if you've added or edited Full Text Dates, click the "Set Full Text Dates" button.
- 4. Since this screen is used to apply global date settings to all the journals in the selected database, you may need to follow the "Edit Dates for Individual Journals in this Database" link, which will take you to the Manage Journal Dates screen for the selected database. On that screen, you can change the date information for journals that have different access restrictions from the majority of the journals in the selected database.
- 5. After you have completed an update, you will see a message above the date management form which piece of information was just updated. For example, if you've added or changed Date Notes, you will see the following message.

All titles have been updated with Date Notes

# **Managing Journal Dates**

- 1. After selecting the "Manage Journal Dates" item from the Holdings menu in the Gold Rush Staff Toolbox, you'll be presented with the standard Gold Rush Provider and Database selection form.
- 2. Once you have selected a Provider and Database, you will see the Journal Dates screen. This screen includes a grid, allowing you to edit the date settings for each individual journal in the selected database.

If the selected database has 500 or fewer titles, you will not see the alphabetical browse bar. If the selected database has more than 500 titles, the browse bar will be included, and the first screen will contain only those titles beginning with the letter 'A'.



3. Use one or more of the journal rows to add or edit the Full Text Start and End dates, Citation Start and End dates, Embargo Period, Window Period, or Date Notes for the journal listed at the beginning of the row.

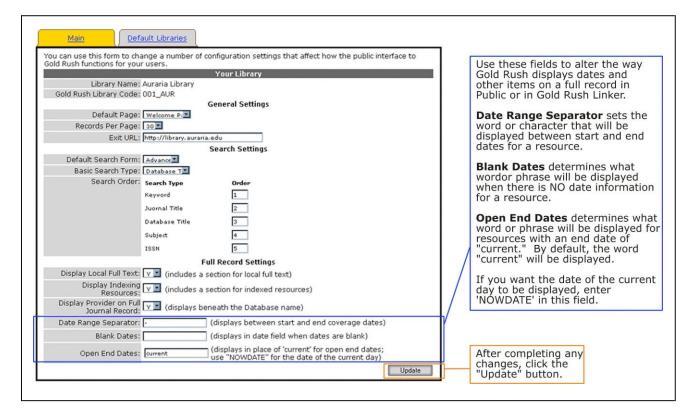
Notes: Date fields with the word "none" indicate that Gold Rush does not currently have information for that date for the current journal. Embargo and Window Period fields with a "0" indicate that Gold Rush has no Embargo or Window Periods defined for the current journal.

- 4. After you have made changes to as many journals as you wish on the current page, be sure to click the "Update" button at the top of the last column.
- 5. After you click the "Update" button, your screen will be refreshed, and you will see a message like the following, indicating that you have successfully updated the indicated journals.

A Friend Indeed has been updated A.N.A.L.O.G. Computing has been updated AALL Spectrum has been updated Abacus has been updated Abilities has been updated Aboriginal History has been updated

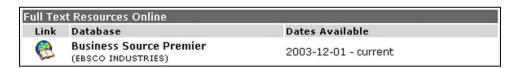
# Managing Date Displays for Public and Gold Rush Linker

- 1. Begin by going to the Settings menu in the Gold Rush Staff Toolbox.
- 2. To change the way Gold Rush displays date information in the public interface and in Gold Rush Linker, select the "Manage Preferences" item.
- 3. The following tabbed form will be displayed.

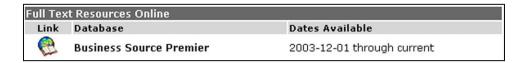


Note: Remember that all date display settings affect both Gold Rush Public and Gold Rush Linker.

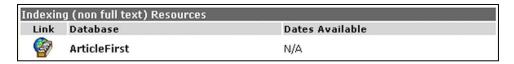
• The first new item does not directly affect the display of dates. However, we had to move the provider name in order to make room for the new date displays, and the "Display Provider on Full Journal Record" setting determines whether or not the provider name is included in parentheses under the database name.



• The Date Range Separator determines what character or word(s) is used between the start and end dates displayed on the Full Journal Record. The default is a '-', but you can replace it with "through," "to," or any other string you like. In the example below, we used "through."



• The Blank Dates setting determines what is displayed to the user on the Full Journal Record if there is no date information for a resource. The default is to simply not display anything. If you would rather use a word or phrase to indicate the lack of date information, you can enter a phrase like "No Date Information," "Dates Unknown," or something similar. In the example below, we used "N/A."

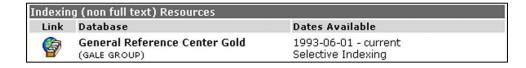


• The Open End Dates setting allows you to change the way Gold Rush displays current, or open-ended subscriptions. By default, Gold Rush will display the word "current" where the end date would be. You can change this to any word or phrase, or you can tell Gold Rush to display an actual date based on the current day (the day the user is searching Gold Rush). Gold Rush will determine the current date, subtract one month from today's date, and display the resulting date. If you want the current date to display, set Open End Dates to 'NOWDATE'. The example below was generated on October 21<sup>st</sup>, 2004.

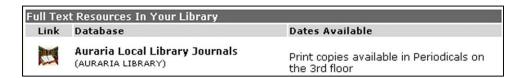
**Note:** Because many database vendors don't actually update their content daily, Gold Rush subtracts one month from the current date and displays the previous month as the end date.



• Any Date Notes that have been added through the Holdings menu will display immediately below the dates for that resource. In this example, the Date Note is "Selective Indexing."



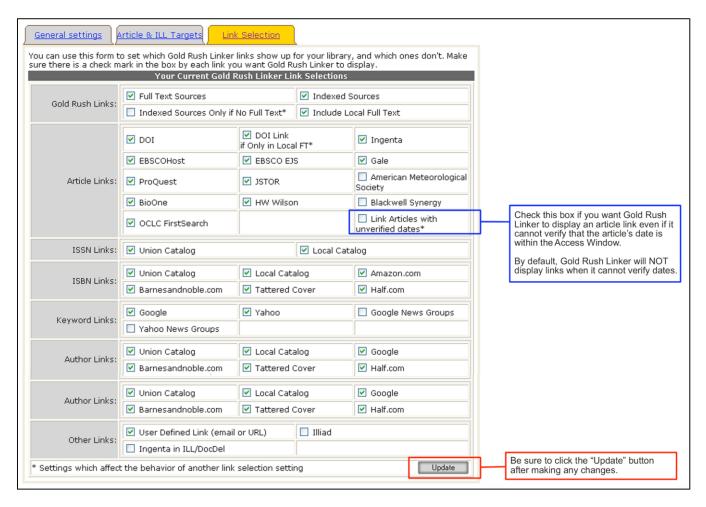
• Date Notes will display even if there are no dates. In such cases, the line above the Date Notes will be blank unless you have set the "Blank Dates" setting above.



# **Managing Date Functionality in Gold Rush Linker**

- 1. Begin by going to the Settings menu in the Gold Rush Staff Toolbox.
- 2. To change the way Gold Rush handles date information in Gold Rush Linker, select the "Manage Gold Rush Linker" item.
- 3. Select the "Link Selection" tab, and the following form will be displayed.

  There is one new check box in the Article Links section, labeled "Link Articles with unverified dates."



By default, Gold Rush Linker will not display an article link if it cannot verify that the article's date is within the access window for a particular resource. If you would like Gold Rush Linker to display article links even when it cannot determine whether or not an article is within the access window, check this box.