TS Transformations: Workflow, Budget, Staffing

Fall, 2012 NOTSL Meeting
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Within the KSU Context

Print + electronic has changed to...
Electronic + print, which has changed to...
E-Only since July 1, 2007

• Closure of the Chemistry / Physics Library
• Re-purposing print collection space for active learning space
• Popularity of e-resources
• Some journals are only available in e-format.
• 40% of bibliographic records in KentLINK have URLs in them.
The budget is in transition

• Currently KSU is spending 70% of its collection budget to purchase electronic resources, and only 30% to purchase print. And it is not trending in the direction of print.

• KSU spends 60% of its collection budget locally. The other 40% is spent for OhioLINK purchases, all of which are electronic.

• E-journal prices now on par with print prices.

• However, for the most part e-books cost 2-3 times more than the print, depending on the license restrictions for simultaneous use.
KSU FY13 Collections Budget Overview

Kent State University Libraries
FY13 COLLECTIONS BUDGET OVERVIEW

- OHIOLINK 35%
- DATABASE SUBSCRIPTIONS - SERIALS - STANDING ORDERS 34%
- BOOKS 13%
- JSTOR/ARTSTOR 3%
- COLLECTION RESERVE 5%
- MEMBERSHIPS/SERVICE 7%
- DOC DELIVERY/CC/ILL 1%
- DDA 2%
Electronic resource management

- Electronic resource management players
- Electronic resource management systems
- Electronic resource management communication

Electronic resources
- Are transformational
- Are here to stay
- And it’s currently chaotic
The nature of the work is changing

- What you buy is changing
- The pricing models are different
- Physical processing and binding
The good news is....

• We’re not all going to be out of a job.
• Electronic resource management work is detailed and can be difficult.
• More work is involved to get the job done. More staff is needed.
• The more experience staff have, the better.
• The more education staff have, the better.

• [Now we just have to convince our administrators.]
E-resources tasks

- Resource identification
- Trials / decision tracking
- Selection
- License evaluation / negotiation
- Ordering and order maintenance
- Payment / pre-payment
E-resources tasks continued

- Activation / registration
- Cataloging
- Holdings maintenance
- Controlling access
- Maintaining access
- Resource discovery
- Access management
- Usage tracking
- Renewals / cancellations
- Preservation
- Data curation
Skills needed

• Serials &/or e-resources acquisition experience
• Knowledge of providers and products
• Licensing experience
• E-resources management experience
• Experience with e-resources tools
• Problem solving skills
More skills needed

- Experience with usage statistics
- Troubleshooting skills
- Understanding multilevel price quotes from content providers
- Managing data collection for usage statistics
- Good communications skills
- Ability to work under pressure
Cataloging skills

- Electronic resources come in many different formats (maps, streaming media, etc.)
- Complex cataloging that requires skilled catalogers.
- Outsourcing this cataloging is expensive. $$$
- The importance of providing access from within the catalog.
- Need for batch-loading skills
Standardized workflows?

• There is a lack of standardized workflows and practices
• Everything is so different
• This makes training support staff that much harder
Training

• There is a need for increased training
• Documentation and/or workflow cheat sheets need to be developed and maintained.
• Training should be individualized where possible
E-resources workflows

Workflow can vary depending upon

• What you buy
• How you buy it
• From whom you buy it
• Pricing model used
• Local management practices
• Number of local discovery tools
• Who you buy it with
Reorganization

• One response to changing materials and workflow
• Facilitates communications and workflow
• Kent’s Bindery reorganization
• Serials staff ordering e-books
• Support for e-resources
ERM Shortcomings

- Lack of workflow tracker
- Lack of access tests tracker
- Inability to provide mechanism for storing & retrieval of internal data
- Alerts = more email in your inbox

None of the ERMS on the market offer a true ticket tracking process, although at least one open-source one sends message alerts to the next step in the process.
KSU Selection Manager

• Centralized system to manage the communication and work related to the review and selection of commercially available electronic resources.

• The automated system:
  • Tracks the review process
  • Provides selectors with price and trial information
  • Compiles reviewers’ feedback
  • Manages the workflow for the provision of pricing information
  • Dispenses product and trial information to targeted selectors.
DDA cataloging workflow

• Data Driven Acquisitions (DDA / PDA)
• Vendor options and local policies met to create a complex workflow that took weeks to iron out, and that is even now not trouble-free.
• There are difficulties diagnosing problems within a system that involves batch loading, constant data, Connexion client and the potential for human error. Who’s doing what?
• Detailed instructions have to be created, posted to the intranet and maintained to enable the complex workflow.
Batch cataloging management

- Technical Services needed standardized workflow processes that would be applicable to every batch project
- Information was needed on:
  - Record source
  - Record quality
  - Record preparation
  - Record processing
KSU checklist tool

• Checklist was developed to document relevant information about each batch cataloging process (useful, and quantifiable, data)
• List of 38 questions, built on experience--developed using trial and error method
• Document is archived, provides a permanent record of every batch project
Advantages

• Reliable documentation and tracking
• Consistency for updates
• Data on vendor quality, service and support
• Promotes cooperation between various areas of TS
• Retools staff with new skills
• Identifies problem workflow areas
• Helps produce better quality metadata
Available Free to All

- Checklist can be downloaded free here: http://www.library.kent.edu/page/16588
Questions?

Credits

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• Deberah England, Electronic Resources Librarian, Wright State University
• Tom Klingler, Assistant Dean, Technical Services, Kent State University
• Melissa Spohn, Head, Acquisitions and Serials, Kent State University
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