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.
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](http://www.library.kent.edu/page/16588)

Questions?

Credits

- Margaret Maurer  mbmaurer@kent.edu  330-672-1702
- 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
- Roman Panchyshyn, Catalog Librarian, Kent State University
- Kay Downey, Collection Management Librarian, Kent State University
- Sharon Hackett, Serials / ERM Librarian, Kent State University