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Adapting & Evolving: Mapping New Routes

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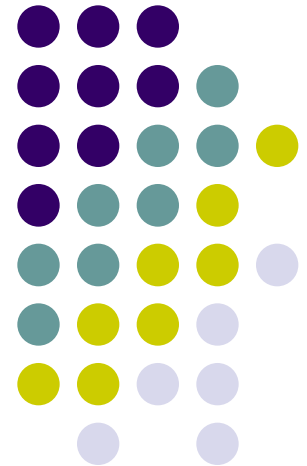
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Adapting & Evolving:
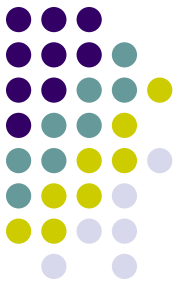
mapping new routes

Presented by:

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and

Mary Beth Thomson
Associate Dean for Collections and Technical Services
**University of Kentucky Libraries**

ARL Supplementary Statistics 2002-03

- Expenditures for electronic resources account for 25% on average, of ARL institutions' library materials budgets.

- ARL libraries reported spending more than $228 million on electronic resources.

- ARL libraries reported a total of $21,470,716 in additional funds spent on their behalf through a centrally funded consortium for purchasing electronic products and services.

- Expenditures for electronic serials have increased by 171% since the 1999-2000 survey and by more than 1800% since they were first reported, in 1994-95.

- In every year since 1992-93, average expenditures on electronic resources have increased at least twice as fast, and in some cases more than six times faster, than average library materials expenditures.

http://www.arl.org/stats/annualsurveys/sup/index.shtml
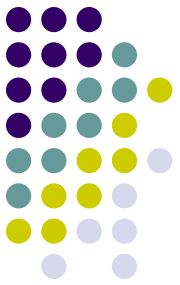
What's new?

- Electronic journal management
- Licensing agreements
- E-books
- E-reserves
- Vendor data loads
- OpenURL link resolvers
- Counter compliant use statistics; SUSHI
- Archiving and data management issues (Portico; LOCKSS)
- Digital rights management
- Cataloging (RDA, FRBR)
- Metadata (EAD, METS, MODS, Dublin Core)
- Federated search engines
- Institutional repositories

Recent Positions

- Digital Resources Cataloger

- Assistant/Associate Dean for Collections and Scholarly Services

- Digital Collections Coordinator

- Digital Projects and Catalog Management Librarian

- Head of Information Acquisitions & Management (medical library)

- Digital Services Librarian

- Metadata/Cataloging Librarian

- Metadata Librarian, Cataloging & Metadata Services Department

- E-Learning Services/Reference Librarian

- Metadata Services Manager

- Assistant Dean for Digital Futures and Technical Services

- Digital/Tangible Media Cataloger
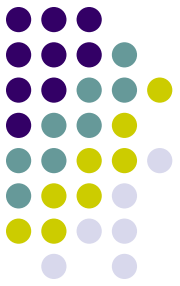
Examples of workflow changes

- Merging acquisitions and copy cataloging

- Creation of a separate electronic resources unit

- Creation of a metadata cataloging position or unit

- Teams to deal with implementation of link resolvers and federated search engines

- Changing from printed theses and dissertations to electronic versions including systems and cataloging changes

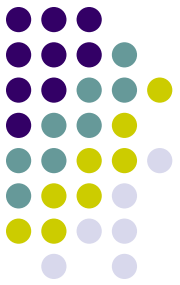- Increased collection development collaboration
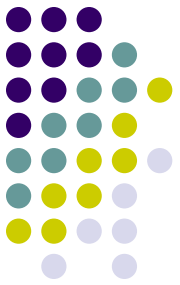
- Closer working relationships between electronic resources, serials, bibliographic access, and public services

- Workflows that cross traditional departmental or division lines

- Workflows with added complexity

- Processes that include the need for more people and systems involvement

- Evaluated and re-designed procedures and policies

Skills and expertise

- Ability to analyze data

- Data loading and management in large quantities

- Independent judgment and decision making skills

- Statistical assessment

- Project management skills

- Knowledge of current metadata schemas, standards, and protocols

- Knowledge of OpenURL link resolvers

- Knowledge of electronic resources management systems

- Ability to work within and across departmental lines

- Creativity

- Advocacy

- Sense of adventure and curiosity

- Willingness to experiment

- More and varied information technology skills
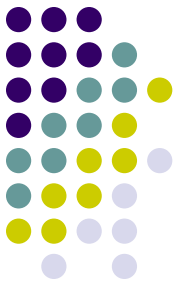
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EXPERIENCE
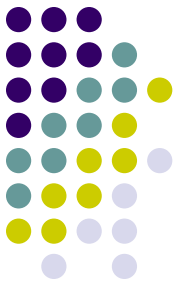
BACKGROUND

- Prior to reorganization the process had been decentralized.

- Complicated form used to attempt to track an electronic resource from point of order through cataloging

- This was not working for us

Changes

- Reporting lines
- Form made more usable
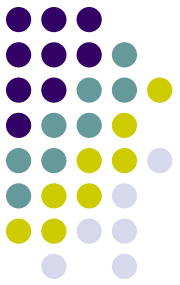- Positions added
- Workflows clarified

Reporting Lines

- New structure – Acquisitions, Collection Development and Cataloging for all areas except Medical Center and Law reported to one person

- Medical Center licensing, some invoicing and cataloging handled centrally

- Easier to disseminate information, update procedures, coordinate activities

Electronic Resource Form
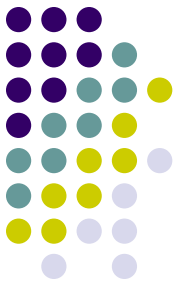
- Simplified to the essential information to get a requested started

- Compliance made mandatory

- Form once completed goes to single person to be recorded and start the process

- Covers trials, wish items or items with identified funding

Position Changes/Additions

- Electronic Resource Coordinator
- Senior Library Technician
- Student Budget resources allocated
- Time from other staff as appropriate
  - Acquisitions person works 2 hours per week checking links from list
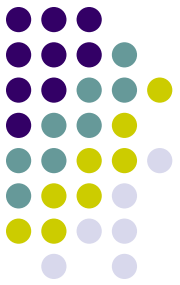
Workflows

- Recognition that this is not a linear process
- Close cooperation from all parties involved is needed
- Need to be adaptable and alert to ways to prevent bottle necks or items disappearing into black holes
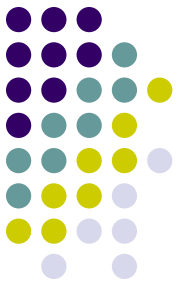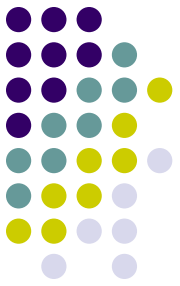
Workflows

- Electronic resource form
- Vetted by ER coordinator and IT if from new source
- Purchased approved by Collection Advisory Committee
- Licensing issues handled between ER coordinator and Associate Dean

Workflows - Continued

- Purchase order created in Voyager
  - Mini bib suppressed until link is active
  - Full level record suppressed until link is active
- Item set up in SFX and local database
- When URL active, information passed to Database Integrity for final cataloging in Voyager.

Workflow

- Database Integrity updates electronic record
- If a print journal record is present in Voyager, 776 linking field added
- If print is replaced by electronic, then print is closed out.
- Database Integrity reports close out to Senior Serials Technician in Acquisitions

Workflow - Continue

- If packages are purchased they follow a similar model, except the purchase order is usually on package level record and a spread sheet of the individual titles goes to Database Integrity

- MARC records may also be purchased and loaded if appropriate and are currently handled by Head, Acquisitions.

Future Developments

- Transitioning print staff to handling electronic as our print needs decrease

- Effective and routine handling of the purchase of e-books

- Local database phased out in favor of Electronic Resource Management system and SFX A-Z list

Contact Information
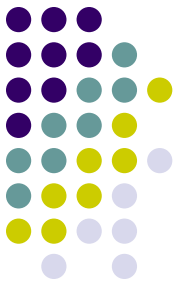
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