

2014

Managing the Acquisition of E-resources

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<http://ir.lib.uwo.ca/wlpres/45>



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Managing the Acquisition of E-resources

April 30, 2014

Robert Graves, Library Systems Administrator
Harriet Rykse, Digital Information Resources Librarian

Western Libraries

- 23,000 full time undergraduates
- 2,800 full time Masters students
- 1,900 full time PhD candidates
- 1,400 full time faculty

Acquisitions (FY 13/14)

- 21,000 firm and approval orders
- 2015 e-books purchased through DDA
- 5281 active print serial subscriptions
- 696 orders and 144 cancellations using the form

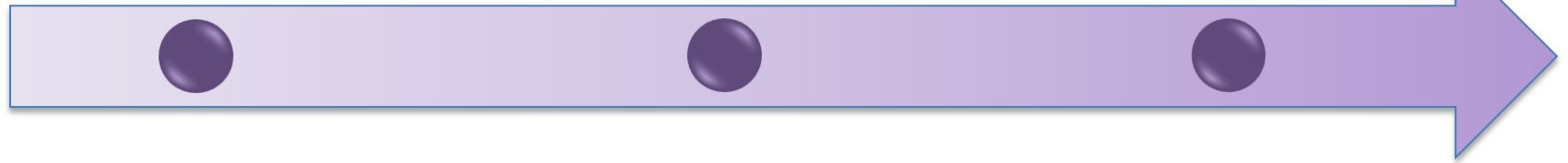
Why change our process?

- Multiple ways of requesting resources
- Electronic requests sometimes “fell through the cracks”

Timeline

ER&L 2011 –
learn about
CORAL

Fall 2011 –
Roll out for
e-resources



Spring/Summer 2011
– created workflows
and began
implementation of
CORAL

Timeline

Summer 2012 –
Cancellation
form added

February 2013 –
Recommender
function added



December 2012
– Print requests
added

March 2013 –
Added an alert
when no steps
available

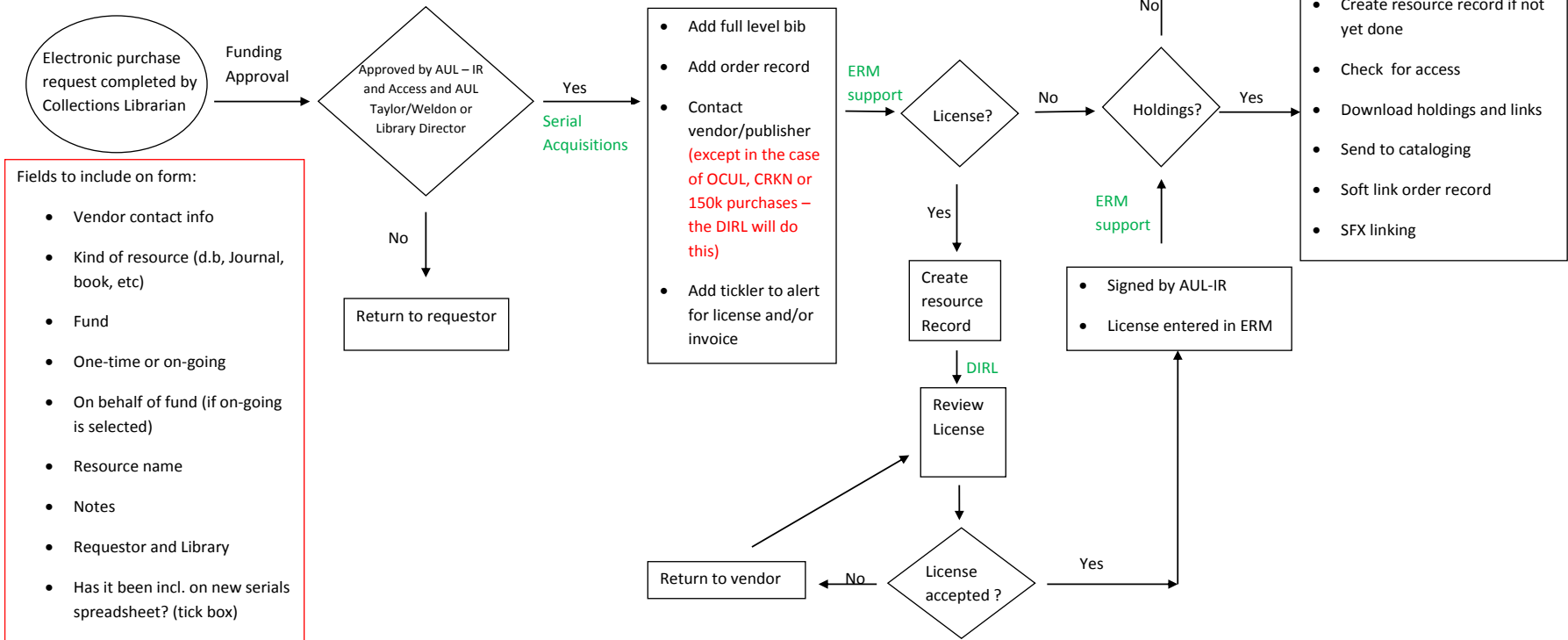
Spring 2011 - Developed Workflows

Serials

On-going expenditure acquisitions workflow (e.g. journals and databases)

Definitions:

- UL – University Librarian
- AUL – Assistant University Librarian
- IR – Information Resources
- DIRL – Digital Information Resources Librarian
- ERM – Electronic Resources Management



- Fields to include on form:
- Vendor contact info
 - Kind of resource (d.b, Journal, book, etc)
 - Fund
 - One-time or on-going
 - On behalf of fund (if on-going is selected)
 - Resource name
 - Notes
 - Requestor and Library
 - Has it been incl. on new serials spreadsheet? (tick box)

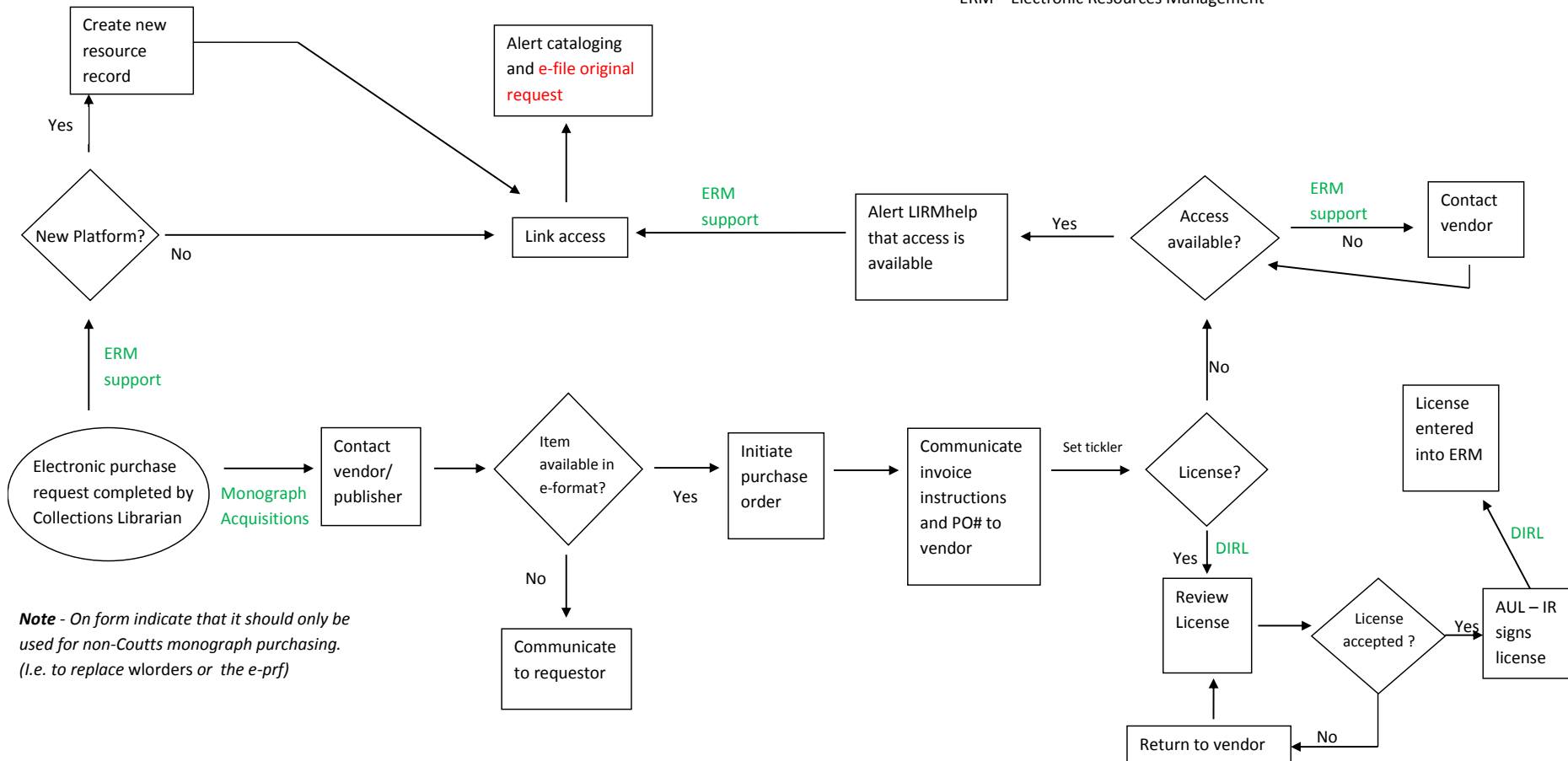
Spring 2011 - Developed Workflows

Monographs

One-time expenditure Acquisition Workflow

Definitions:

UL – University Librarian
 AUL – Assistant University Librarian
 IR – Information Resources
 DURL – Digital Information Resources Librarian
 ERM – Electronic Resources Management





















Note - On form indicate that it should only be used for non-Coutts monograph purchasing. (I.e. to replace w/olders or the e-prf)

Spring/Summer 2011

Began local implementation

Workflow Setup

Acquisition Type	Resource Format	Resource Type		
One-time expenditure	Any	Single E-book(s) (not Coutts)		
One-time expenditure	Any	Single E-journal(s)		
One-time expenditure	Any	E-book package		
One-time expenditure	Any	E-journal package		
One-time expenditure	Any	Database		
One-time expenditure	Any	Consortial		
One-time expenditure	Any	Print Journal		
One-time expenditure	Any	Other		
Ongoing expenditure	Any	Single E-book(s) (not Coutts)		

Spring/Summer 2011

System Requirements

- Separate modules for different sections of CORAL
- Apache, PHP 5, MySQL 5
- Object-oriented PHP & JavaScript (jQuery)
- Plugged in easy to our existing corporate authentication

Fall 2011

Rolled out for e-resources

- Training for acquisitions staff
- Training for collectors

Home **New Resource** Cancellations My Queue Admin

Search

new search

Name (contains)

ISBN/ISSN

Fund

Acquisition Type

All

Status

In Progress

Creator

All

Library

All

Resource Format

All

Resource Type

All

Record ID

Starts with

A B C D E F G H I J K L M N
O P Q R S T U V W X Y Z

more options

List Serials Cancellations

Displaying 1 to 25 of 31 Resource Records


ID	Name	Creator	Date Created	Acquisition Type	Status	Step
1454	World Tax Journal	Elizabeth Bruton	4/16/2014	Ongoing expenditure	In Progress	
1448	7 Wiley ebook titles	Qingqin Zhang	4/14/2014	One-time expenditure	In Progress	
1445	Bar Journals Library	Elizabeth Bruton	4/14/2014	Ongoing expenditure	In Progress	
1444	Brill's Encyclopedia of the Neo Latin World	Bruce Fyfe	4/14/2014	One-time expenditure	In Progress	
1446	Hague Academy of Collected Courses Online	Elizabeth Bruton	4/14/2014	Ongoing expenditure	In Progress	
1430	multiple Wiley ebooks	Qingqin Zhang	4/10/2014	One-time expenditure	In Progress	
1417	American Institute of Physics Journals (AIP)	Karen Marshall	4/7/2014	Ongoing expenditure	In Progress	
1413	Specialized Legal Research	Elizabeth Bruton	4/1/2014	Ongoing expenditure	In Progress	
1409	Journal of Investing	Elizabeth Marshall	3/28/2014	Ongoing expenditure	In Progress	
1407	U.S. Congressional Documents	Elizabeth Bruton	3/27/2014	Ongoing expenditure	In Progress	
1374	Canadian Commercial Law Guide	Elizabeth Bruton	3/20/2014	Ongoing expenditure	In Progress	
1373	Canadian Securities Law Reporter	Elizabeth Bruton	3/20/2014	Ongoing expenditure	In Progress	
1362	Oxford Scholarly Authorities on International Law	Elizabeth Bruton	3/20/2014	Ongoing expenditure	In Progress	
1361	Products Liability Reporter	Elizabeth Bruton	3/17/2014	Ongoing expenditure	In Progress	
1338	IEEE Smart Grid Research Documents	Debbie Meert-Williston	3/3/2014	One-time expenditure	In Progress	
1336	Adam Matthew Digital (6 databases - see notes)	Bruce Fyfe	2/28/2014	Content Fee plus Ongoing Access Fee	In Progress	
1304	3D Building Data Package, London Ontario	Karen Marshall	2/19/2014	One-time expenditure	In Progress	
1307	Federal Securities law Reporter	Elizabeth Bruton	2/19/2014	Ongoing expenditure	In	

Hague Academy of Collected Courses Online


 Product

 Access

 Contacts

 Accounts

 Attachments
(0 records)

 Tasks

 Resources

Hague Academy of Collected Courses Online Ongoing  
expenditure Electronic

Record ID: 1446

Type: Database

Status: In Progress

Submitted: 04/14/2014 by Elizabeth Bruton

Last Update: 04/14/2014 by Harriet Rykse



Resource URL: <http://home.heinonline.org/> 

Description: The Hague Academy, founded in 1923, is an institution for the study and teaching of Public and Private International Law and related subjects. Its purpose is to encourage a thorough and impartial examination of the problems arising from international relations in the field of law.

This collection includes the following publications from the Hague Academy:
 Collected Courses (1923-)
 Periodical Indexes
 Official publications from the Workshops
 The Law Books of the Academy
 Brochure: heinonline.org/HeinDocs/hacco.pdf

[edit product details](#)

Additional Notes [add new note](#)











Licensing Details: Waiting to hear if license will be required.
  04/16/2014 by Harriet Rykse

Helpful Links

[Print View](#)

[Send feedback on this resource](#)

Hague Academy of Collected Courses Online

 Product	Step	Group	Start Date	Complete
 Access	confirm with library director and approve; print, sign and file	Funding Approval	04/14/2014	04/14/2014 by Harriet Rykse
 Contacts	add bib and order records; contact vendor; check for license & place note in workflow if no license required; tickler to alert for license or invoice	Serial Acquisition	04/14/2014	04/16/2014 by Judy Bodaly
 Accounts				
 Attachments (0 records)	review, sign and return license to vendor; add license record to ERM	Licensing	04/16/2014	mark complete
 Tasks	Create resource record; add resource to coverage load spreadsheet; link ser. sol. holdings; SFX linking; soft link order record; check for Marc if needed	ERM Support	04/16/2014	mark complete
 Resources	distribute for cataloging	Cataloging		
	 change workflow  restart workflow  mark entire workflow complete			

Resources Request Form

* required fields If you are having trouble seeing the entire form, click on the headings to hide a box from view

Acquisition Type *

Ongoing expenditure

On Behalf Fund:

Required for Taylor and Weldon

Spreadsheet: Added to New Serials Fund spreadsheet?

Additional Information

Resource Other

Type: * For free resources, select 'Other'

p
Printed Music OT for
Print Book

Consortium:

Simultaneous

Users:

Title List: No file selected.
Excel preferred

Cost

Fund: Price: Type:
 CAD

Notes

Additional Information (eg. priority, hold request, replacement)

Carbon copy other staff? (separate e-mails by commas)

Home New Resource Cancellations My Queue Admin

Search

[new search](#)

Name (contains)

ISBN/ISSN

Fund

Acquisition Type
 All ▾

Status
 In Progress ▾

Creator
 All ▾

Library
 All ▾
 Archives
 Business
 Education
 Law
 LIRM
 LITS
 Map & Data
 Music
 Other
 Taylor
 Weldon

[more options...](#)

[List Serials Cancellations](#)

Displaying 1 to 25 of 31 Resource Records

<< 1 2 >>

ID ▲ ▼	Name ▲ ▼	Creator ▲ ▼	Date Created ▲ ▼	Acquisition Type ▲ ▼	Status ▲ ▼	Step
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1307	Federal Securities law Reporter	Elizabeth Bruton	2/19/2014	Ongoing expenditure	In Progress	



add bib and order records; contact vendor; check for license & place note in workflow if no license required; tickler to alert for license or invoice



Summer 2012 Cancellation form added

Serials Cancellation Form

* required fields

Product Information

Location: *

Title: *

Call #: *

Format to be Cancelled: *

Reason for Cancellation: *

Most Recent Cost:

Specify in Canadian Dollars

Added to Spreadsheet: *

Notes:

Include any additional information

Carbon copy other staff? (separate e-mails by commas)

save as draft

submit

exit without saving

December 2012

Print requests added

Resources Request Form

* required fields If you are having trouble seeing the entire form, click on the headings to hide a box from view

Format *

Electronic

Print

Print + Electronic

Other

Product

Title: *

Year:

Description:

Series Title:

Provider / Vendor:

of Volumes:

URL:

of Copies:

ISBN / ISSN:

Edition:

Author:

Location Code:

Publisher:

Example: TSTKG, MGMIN

February 2013

Recommender Function added



Home | New Resource | Cancellations | **My Queue** | Admin

My Queue

Resources



- Saved Requests
(0 records)
- Saved Requests for Taylor**
(1 record)

Saved Requests for Taylor

ID	Name	Date Created	Created By	
1421	Encyclopedia of Membrane Science and Technology	4/8/2014	Idunn	 

February 2013

Recommender Function added

Brill's Encyclopedia of the Neo Latin World One-time expenditure Electronic  	
Record ID:	1444
Type:	Single E-book(s) (not Coutts)
Status:	In Progress
Submitted:	04/14/2014 by Bruce Fyfe <i>Initially Saved 04/14/2014 by Fran Gray</i>

March 2013

“No workflow” alert added

- Workflows can get complicated
- Need to account for each possible variation
- Occasionally a possible workflow is not accounted for
- Notifies administrators if resource is added but not in a workflow

Creating a Fork: Advantages & Disadvantages

Advantages	Disadvantages
Freedom to develop what we need when we need it	Can't upgrade to CORAL's new versions
We don't need a full ERMS	Need to code enhancements ourselves
In-house IT available	

Questions?

Harriet Rykse – hrykse@uwo.ca

Robert Graves – rgraves2@uwo.ca

CORAL: <https://erm.library.nd.edu/>



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