Transforming Into Effective Electronic Resource Management Organizations

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Introduction

2 years ago… “Who Moved My eJournal?: eResources and Organizational Change”

- Now the reality – available budgets, people, technology, and changes…

- We are Evolving… but into what?
  - From: “acquiring and managing collections”
  - To: “integrating processes and systems for optimal collections discoverability, accessibility, and use by end users”
  - Libraries’ response… (Jeff Carrico to cover more in-depth)

- Assertion… we are becoming User Interaction Designers and Specialists
Drivers behind “Library Change”

- **Economics:** Driving content into e-resource content
- **User Perspectives:** Google vs. e-resource searching
  - (assuming online, “anytime/anywhere”)
- **Library Resources vs. all Web Resources**
  - Impact of IRs, OA private business models, OA gov’t mandates
- **Publishers/Content Aggregators**
  - Subscribed to, plus “extra” content, and “Big Deals”
  - Deal with collections at the publisher/aggregator-level, not the title- or issue-level
- **Web Technology**
  - Social networking and communications tools (end user & library)
  - Pull content into virtual communities (end user)
  - Emerging Network As Platform
Trends in Library Resources

- Elsevier / Science Direct (2006): 40% subscription revenues from e-only

- Ulrich’s International Periodicals Directory (6/06):
  - 23,187 active and refereed journal titles (low)
  - 14,338 active, online, & refereed journal titles (62%) (38% print only)

- Directory of Open Access Journals (2/07):
  - 3,264 peer-reviewed OA journals, up 1,815 titles in 2005

- British Library study (2003):
  - 2016: 50% of serials will be e-only

- Ithaka study (2003): 78%: 7,400 faculty - EJs “invaluable research tools”

- Carol Tenopir (2003): 2/3 of faculty in study, reading from e-resources

- Publishers Communication Group (2004):
  - 84% of int’l librarians (155) cancel print when e-version is available

- ARL (2005): 98% of journal licenses provide for archival access
What are Libraries Doing?

• **Reframing** the problemspace: our perspectives, our work interactions
  ▪ Between each other, between libraries and end users

• **Realigning:** human resources

• **Refocusing:** Not “acquiring Collections”, but Colls. “discoverability and accessibility”
  ▪ Ultimately… how end users interact with and utilize the information they access

• **Rebuilding:** “Technology with Collections”
  ▪ Flatter, highly integrative organization (new skills, new experiences as they come along)
Components of Library Response: Access & Use vs. Management

- **Web Design**: presentation on the Web, information architecture, navigation, usability studies

- **Desktop / Collaboration Services**: integral service to collaboration model of ERM
  - Wikis, blogs, document sharing (staff communication)

- **Technical Services “Melting Pot”**: blending and cross-training of serials/acquisitions with cataloging
  - benefits, and… why do this?

- **NextGen** link resolvers and “designer” search tools
  - Lots of search tools for different resources and user needs (mix/match)
  - IRs and OA content – relationship? Incorporate into discovery/search

- **eBooks**: the next resource we will “figure out”
Changes and Outcomes

- **Changes**… A Prelude to Outcomes:
  - **Systems**: not just a “systems support” function
  - **Cataloging**: not just a “build the catalog” function
  - **Serials/Acquisitions**: not just a “purchase the materials” function
  - **Collection Development**: not just a “select the materials” function
  - **Info Services**: not just a “teach people how to use the materials” function
  - Not just “Linear” any longer - come together as a group
Working groups manage eResources

- Collection Development
  - ER Librarian / staff
- Public Services
  - Mgmt./ Librarian
- Systems
  - Web Designer, Collaboration Support
- Collection Acq. & Mgmt
  - ER Librarian / staff
- Cataloging
  - ER Catalog Librarians

E-Resources Group
Cross-functional, cross-department group to perform e-resource management
Librarians in New Paradigm

As *Instructional Partners in learning spaces* (physical and virtual)

As *Anthropologists (observers) of information users, producers* (includes market research / user assessment)

As *Systems Builders* (digital information systems, licensing, metadata, web design, collections selectors, etc.)

As *Content Producers, Broadcasters, Communicators* (its all about the content!)

As *Organizational Designers* (managers, leaders, org. designers, org. learning specialists, “knowledge environment engineers”)

[Georgia Tech Library and Information Center]
The “Outcomes”

1) **Systems Design and User Centeredness**
   - External, customer focused

Design **User Interaction Environments** to promote collections use by end users

- Library web site as “user interaction environment”
  - Interact with databases, indexes, journal content, web pages, book content, archival finding aids, repositories, etc.

- Above groups of units and people come together and become User Interaction Designers
Outcomes

2) Internal Behavioral Change… Becoming User Interaction Specialists

- **User Interaction Design:**
- Discipline of defining the behavior of products and systems a user can interact with.
- Centers on complex technology systems: software, mobile, other electronic devices.
- Defines the behavior of an artifact or system in response to its users.
- Objective is to increase user satisfaction. (wikipedia)
Outcomes

Develop **Integrated Systems and Processes**…

- …resulting in optimal collections discoverability, accessibility, and use by end users
  - Developing systems to respond to user’s experience, not the other way around
  - This is a “Human Systems” design function, drawn from direct user interaction / assessment data

- Library staff and units:
  - Improved orientation toward the end user by focusing on collections discoverability and accessibility via the Web

- It’s all about the user’s interaction with our collections and services…
So, how did this manifest itself at Georgia Tech’s Library in the Collection Acquisitions and Management Department?
Some outside forces/factors that impact us...

- Collection Acquisitions and Management Department experience is all that is being addressed here
  - There are many, many other initiatives occurring in the Georgia Tech Library
  - We are the “old” Technical Services; Acquisitions, Cataloging, Government Documents, Processing and Binding

- Budgets are tight or stagnant
  - We need to provide better access to the materials we already have
  - Personnel are stretched thin and no more are on the horizon

- Federated searching is what users expect
  - Google it

- OPAC’s/ILS’s are good for some material types but not all
  - We have to work with MARC and OCLC
  - Our ILS has limitations
  - Users have high expectations

- Electronic is here to stay
  - E-journals are “easy”, E-books are “tough”

- Acquisitions is now about access, too as Cataloging was already

- We make user-centered decisions in our department
  - What benefits the user most directly
Georgia Tech Experience - Personnel

**Staff**
- Two departments (Acquisitions and Cataloging) of 23 people merged into one department of 18 people
- Units
  - Serials (print)
  - Monographs
  - Electronic Resources
  - Cataloging – Serials and E-resources
  - Cataloging Monographs and Government Documents

**Electronic Resources Coordinator**
- Manages a unit of three people
- Handles all the e-journals and databases; licensing, payment and management

**More Electronic resources and less print**
- Approximately 95% of our journal collection is e-only – approx 30,000 e-journals in SFX

**More work has been taken on, not much taken away**
- Still checking/claiming serials and binding
- Still cataloging materials
Georgia Tech Experience-Systems and Software

- **Voyager**
  - Moved from Sirsi in 2001

- **OCLC**
  - Georgia Tech has a typical OCLC relationship
  - Georgia Tech strives to make sure our cataloging matches work done by others
  - MARC format

- **SFX**
  - Quantum leap in providing access to our e-journals at the article level

- **Umlaut**
  - Locally created search/result enhancement tool
  - Mixed catalog results with outside results
  - No longer used, but still being developed
  - We may reincorporate it again later
Georgia Tech Successes—Personnel

- Electronic Resource Coordinator Positions
  - Collection Acquisitions and Management and Collection Development
  - Improved communication between the departments
  - E-journal Wiki

- Communication overall improved
  - Regular meetings
  - Regular emails
  - Web and Library 2.0 solutions being incorporated into workflows

- Training is shared
  - Train one, train them all
  - Training Czar

- More people engaged in e-materials work
  - EDI for payment recording and book ordering
  - Even invoices are being paid by Purchasing Cards—purchasing e-resources with an e-resource!

- Overall-less people are doing more
Georgia Tech Successes-Systems and Software

- **SFX**
  - Users can get to articles directly from our e-journals
  - E-journals are updated and organized

- **Web and Library 2.0**
  - E-journal Wiki is prime example
  - LibShare is new GaTech Library initiative

- **LOCKSS**
  - Lots Of Copies Keep Stuff Safe
  - Providing archival backup to certain materials

- **Blackwell’s Collection Manager**
  - Coordinating book ordering

- **Georgia Tech Library Systems Department!**
Georgia Tech Challenges—Personnel

- **Reduced staff**
  - More work
  - Setting up and administering new systems takes people time
  - Assessing the best way to use staff in providing access to materials
  - Less manual processing

- **More training**
  - Training Czar
  - Finding time to train is tough

- **Peoples’ Fear**
  - That jobs will become obsolete
  - That familiar systems will become obsolete
  - That “Libraries” will become obsolete
Georgia Tech Challenges-Systems and Software

- **Voyager**
  - One big challenge
  - Only searches traditional bibliographic (MARC) records
  - Results aren’t equal or homogenous
  - DVD’s don’t display the way we would like
  - Proceedings don’t display the way we would like
  - Not able to batch load things directly-requires intervention
  - Batch loading makes the system slow down
  - Some methods we use to provide “better access” makes it more difficult to process records
  - Need help from the System Administrator to do many things
  - Expensive to own and maintain
  - Users don’t understand what they are seeing-not a familiar “feel”
Georgia Tech Challenges-Systems and Software

- SFX
  - The server is not under our direct control and we have to request certain changes to be made
  - Time consuming to maintain and administer
  - Not all titles are in SFX
  - Functionality is not 100% (ie, title changes)
Georgia Tech Challenges-Systems and Software-New

- **Verde (new)**
  - ERM for locally owned databases
  - Requires a lot of setup
  - Complex to administer
  - Time intensive
  - Users benefits are indirect

- **MetaLib (new)**
  - Federated search tool for external databases
  - Not all databases eligible
  - Untested
  - Some technical issues (speed, results)
  - Administration is difficult
  - Shared server with other instances
Georgia Tech Challenges-Systems and Software-New

- **VuFind (new)**
  - Search tool to overlay current Georgia Tech Library catalog records
  - Getting developer time to do the things we need to do
  - Getting local developer time to do the things we need to do
  - What do we need to do?
  - Competing with other projects for time and effort
  - Records have to be “massaged”
  - Untested

- **Open Source Software**
  - Have to wait for others to make modifications
  - Requires developers (external and internal) and local implementation
The future for Georgia Tech-Personnel

- Further blurring of duties
- Knowing how and when to prioritize projects and new developments
- Who do we train and how?
- Verde vs MetaLib vs Xserver implications for workflow
  - Metadata?
  - Cataloging?
  - MARC?
  - Bulk-loading of bibliographic records of all kinds?
  - It can handle it all
The future for Georgia Tech-
Systems and Software

- **VuFind**
  - Has the potential to solve many of our access and workflow problems
  - Search veneer over our records
  - We can add different kinds of records to the database and VuFind searches them all
  - Allows for specialized searches on certain materials such as DVD’s
  - Institutional Repositories can easily be included
  - Records have to be in the database, but they can start out as different kinds of records (MARC, metadata, XML, etc)
  - Will not replace Voyage but operate along side it
  - Allows us to catalog “by the rules” and yet offer access as users expect
  - We don’t need to change workflows every time there is a change in materials- for example, to add a new digital image database to the collection and make it searchable with other materials, we simply add the records to our VuFind database
The future for Georgia Tech-Systems and Software (cont)

- **Verde**
  - Time-oh where is the time?
  - Data-entry
  - Design-what goes into it?
  - Personnel
  - No one moment when it will be “live”
  - Shared with others (both good and bad)

- **MetaLib**
  - May be successful on a subject by subject basis
  - Not easy to set up
  - Not easy to administer
  - Shared with others
The future for Georgia Tech-Systems and Software (cont)

- **VuFind/MetaLib Xserver**
  - The next big leap for Ga Tech?
  - VuFind and MetaLib fused together
  - Vufind searches with the database
  - Metalib Xserver searches the materials out of the database
  - Results come back and are displayed homogenously
  - Xserver is a “paid for” product but customizable and some of the customization can be shared with others
  - Developers’ (in the larger world) time and energy
  - Local developer time and energy
  - Very customizable
To sum up—what’s important?

- **People are the most important commodity**
  - Staff and users both
  - Train them all
  - Communicate with them all
  - Web 2.0 and Library 2.0 technologies may be a way to further that communication
  - Expectations of users and staff are very important

- **Systems/Software solutions can improve access**
  - SFX really works for us
  - Verde should work for us
  - MetaLib should work for us
  - VuFind may really work for us
  - VuFind/MetaLib Xserver implementation could revolutionize the access we provide to our materials
  - And save us time and energy, too

And isn’t improved access for the user the reason we are here?
Links

- Georgia Tech Library’s LibShare
  https://libshare.library.gatech.edu/clearspace/index.jspa
- Vufind
  http://www.vufind.org/
- SFX
  http://www.exlibris-usa.com/category/SFXOverview
- Verde
  http://www.exlibrisgroup.com/category/VerdeOverview
- MetaLib
  http://www.exlibrisgroup.com/category/MetaLibOverview
- MetaLib Xserver
  http://www.exlibrisgroup.com/category/MetaLibXServer
- LOCKSS
  http://www.lockss.org/lockss/Home
Thank you for your time!

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