

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)

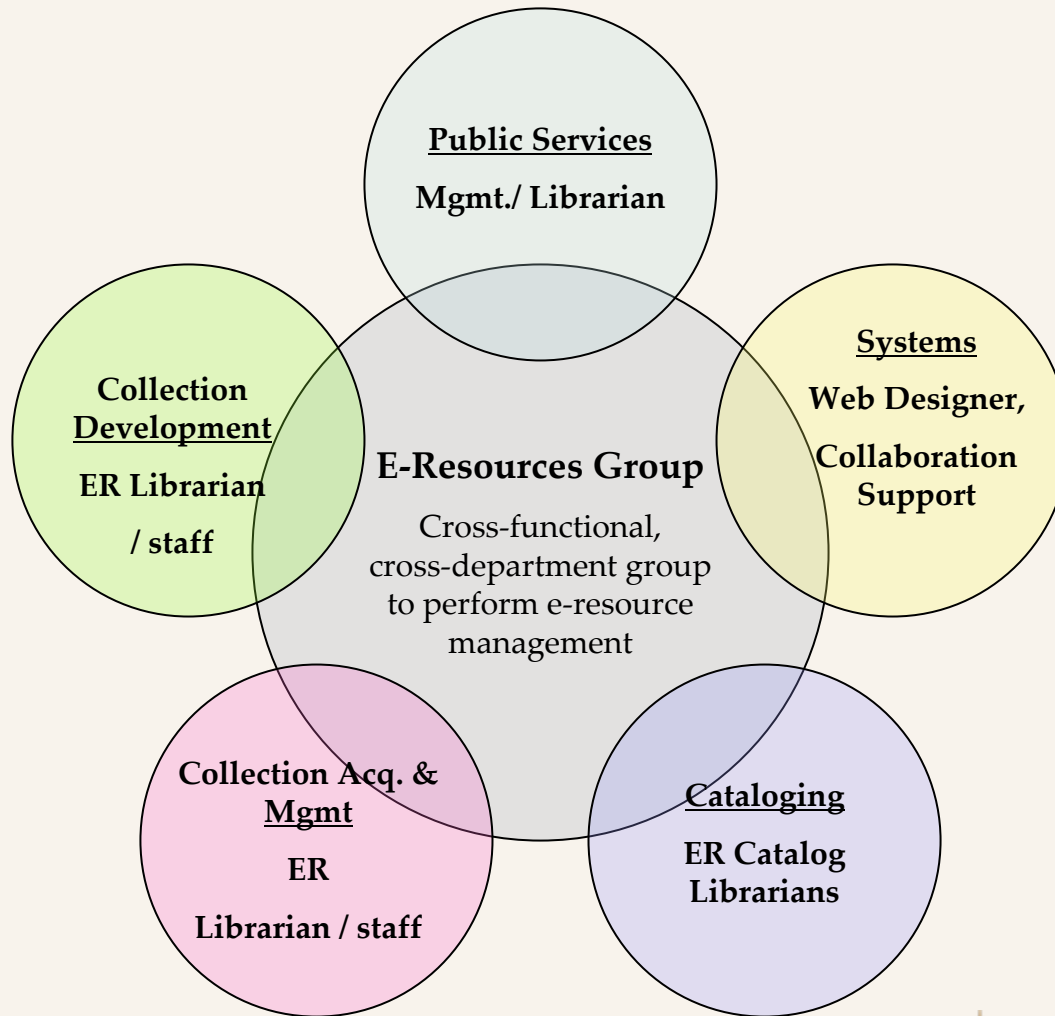
Components of Library Response: Access & Use vs. Management

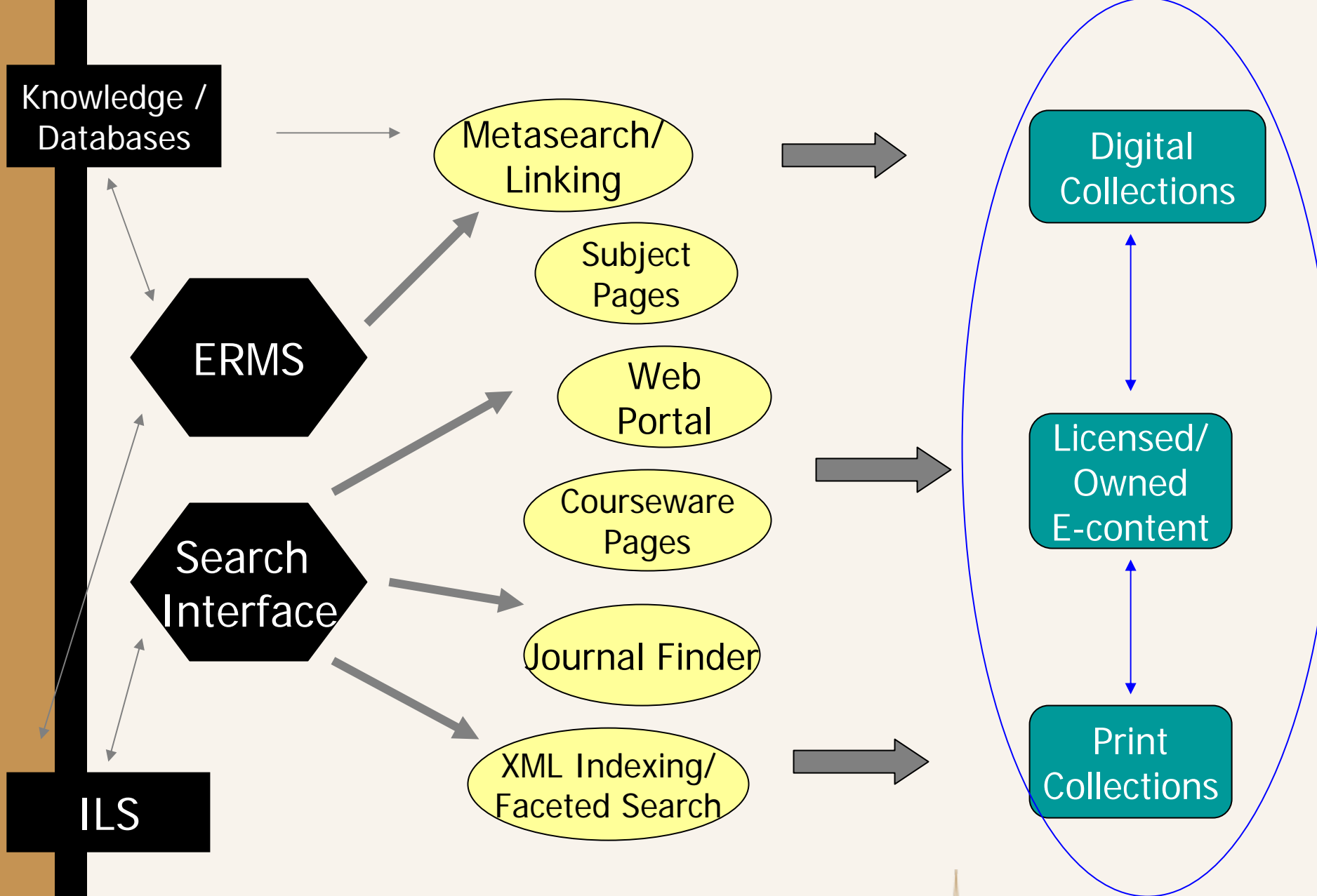
- Web Design: presentation on the Web, information architecture, navigation, usability studies
- Desktop / Collaboration Services: integral service to collaboration model of ERM
 - Wikis, blogs, document sharing (staff communication)
- Technical Services “Melting Pot”: blending and cross-training of 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





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”)

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!

Feel free to contact us anytime:

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