Why unlock your link resolver’s “black box”?

The answer lies in your strategic plan

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Resource Linking Librarian

Electronic Resources & Libraries 2008
Agenda

- What is a black box?
- The SFX Basics Series
  - Course content
  - Common elements
- K-State Libraries’ 2007-2012 Strategic Plan
  - Meeting goals & objectives with SFX Basics
- Is SFX Basics strategic?
- Questions & discussion
The mysterious black box

- “...any assembly or subassembly ... that can be inserted in or removed from a system by a user without a detailed knowledge of its internal structure.”

- “…a device or system or object … viewed primarily in terms of its input and output characteristics.”

- “stuff goes in; magic happens; different stuff comes out”
  --J. Brooks-Kieffer
**Link resolver = black box?**

Users work only with “inputs and outputs”
Link resolver = black box?

Staff can administer SFX “without a detailed knowledge of its internal structure”
K-State Libraries’ black box:

- SFX live since August 2006
- Hosted & administered on-site
- Popular with staff and users
- Most staff use public interfaces:
  - Get It menu
  - Get It button
  - A-Z List
  - Citation Linker
Unlock the box

Staff can use a link resolver to...

- Improve the user experience
- Work across department lines
- Assess library services and collections

...but only if they understand its tools

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SFX Basics series:
- Behind the Get It Button
- The Service Desk’s Guide to Get It
- Useful Usage Data
- Collection Development Power Tools

Series goals:
- Reveal how SFX works
- Enable problem-solving
- Improve error reporting
- Advertise added-value features
- Encourage use of advanced tools
Selling the series

- Inclusive
- Short sessions
- Self-contained classes
- Course content on wiki
Course Content for SFX Basics 1: Behind the Get It Button

Goal:
- Reveal how SFX works

Method:
- Explain OpenURL using familiar terms
- Play a game about SFX transactions
- Think about real-life situations
- Ask lots of questions
**Explain OpenURL in familiar terms**

**Metadata**


**Structure**

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<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
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<td>9786-7547</td>
<td>Article</td>
<td>Journal</td>
<td></td>
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</tr>
</tbody>
</table>

**URL**

http://....
Explain OpenURL in familiar terms

http://pulsar.lib.ksu.edu:3210/sfxlcl3?
url_ver=Z39.88-2004;
url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx;
url_val_fmt=info:ofi/fmt:kev:mtx:journal;
rt.atitle=Metaphor, symbolic play, and logical thought in early childhood;
rt.auinit=JA;
rt.aulast=Seitz;
rt.date=1997;
rt.epage=391;
rt.genre=article;
rt.issn=8756-7547;
rt.issue=4;
rt.spage=373;
rt.stitle=GENET SOC GEN PSYCH;
rt.title=GENETIC SOCIAL AND GENERAL PSYCHOLOGY MONOGRAPHS;
rt.volume=123;
Play a game about SFX transactions
Think about real-life situations
Ask lots of questions

• From each group in turn:
  • What or whom did you represent?
  • What did you do?
  • Did the process work?
  • Anything unexpected?
• From everyone:
  • Discuss:
    • One clearer thing about Get It
    • One still confusing thing about Get It
    • Other lingering questions

Think about real-life situations
Ask lots of questions

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Course Content for SFX Basics 2: The Service Desk’s Guide to Get It

Goals:
- Enable problem-solving
- Improve error reporting

Method:
- Demonstrate public interfaces
- Simulate common errors
- Think about real-life situations
- Ask lots of questions
Demonstrate public interfaces

Paths going away:
- Databases
- E-Journals list
- Citation Linker

Destinations:
- Get It button
- Get It menu
- Database

Paths coming home:
- Get It button
- Get It menu

- Catalog
- Illiad
- RefWorks
Simulate common errors

Get It search misses cataloged item:

Problem:
Information transmitted from Get It to catalog fails to find a resource we own (known issue with CSA Philosopher’s Index)

Solution:
Email details of search to Jane Hale

Timeframe:
24 - 48 hours to investigate; longer to solve database or Get It programming problem

Workaround:
Check search for weird characters, extra info, or wrong metadata
Modify data and re-run search
Think about real-life situations
Ask lots of questions

- Describe the error (and how you found it) in extensive detail

- Use IM or the telephone for emergencies

- Use email when you can wait for a reply

- Is a patron waiting for a solution? Tell us!

- Be patient – Get It doesn’t change instantly:
  - Production processes changes in 24 hours, 7 days per week
  - E-Journals list processes changes in 24 hours, 5 days per week
Course Content for SFX Basics 3: Useful Usage Data

Goals:
- Advertise added-value features
- Encourage use of advanced tools

Method:
- Define terms & abilities of SFX usage data
- Show SFX data from K-State Libraries
- Think about real-life situations
- Ask lots of questions
Define terms & abilities of SFX usage data

• **The transaction:**
  • Request: a click of the Get It button
    Invokes the Get It menu from any source
  • Clickthrough: a click of GO inside the Get It menu
    Opens the user’s choice of target
  • Menu screen: the Get It menu
    Also called the SFX menu

• **The requested action:**
  • Service: what the user asks Get It to do
    Ex: getFullText, getHolding, getDocumentDelivery
Define terms & abilities of SFX usage data

Within scope:
• Count choices made around Get It button and menu
• Enhance and supplement other sources of usage data

Outside scope:
• Count choices made before clicking Get It or after moving to a target
**Show SFX data from K-State Libraries**

Six queries are processed monthly:
1) Number of requests and clickthroughs per day
2) Number of requests and clickthroughs per source
5) Number of SFX requests with/without full-text services
7) Number of clickthroughs per target
10) Most popular serials selected by target
19) Most popular journals
   (in bold on your handout)

Questions about these queries?
Think about real-life situations

How many of our users visit a source database and then do something besides click Get It?

- SFX Query 2 - requests & clickthroughs per source
- Source database vendor data

How much money do we spend on unused full-text journal access?

- SFX Query 16 - unused full-text journals
- Acquisitions/purchasing data

How many users give up their search for an item at the Illiad form? Does this happen from one source more than another?

- SFX Query 13 – number of document delivery clickthroughs per source
- Illiad data
Ask lots of questions

• Which queries look promising?

• What creative possibilities do you see in this data?

• Which queries should be added to or deleted from the monthly process? Why?

• What forms of delivery do you find useful?

• Other questions?
Course Content for SFX Basics 4: Collection Development Power Tools

Goals:
- Advertise added-value features
- Encourage use of advanced tools

Method:
- Define terms & abilities of SFX KBTools
- Generate sample reports
- Think about real-life situations
- Ask lots of questions
Define terms & abilities of SFX KBTools

- **DataLoader:**
  Manage and update object portfolios

- **Look-up Tool:**
  Match journal titles to ISSN, ISBN, or LCCN

- **Export Tool:**
  Export information from the KB in various formats

- **TargetMatcher:**
  Batch finding and activating targets and object portfolios

- **Threshold Tool:**
  Manage local thresholds in the KB

- **Category Tool:**
  Set up, copy, and view Ex Libris categories

- **Collection Tool:**
  Compare targets and active object portfolios
Define terms & abilities of SFX KBTools

Collection tools aren’t:
• Scheduled
• Daily data-trackers
• About the patron

Collection tools are:
• Problem-solvers
• About the items available for use
• About how those items interact
• About the library-as-user
Generate sample reports
Think about real-life situations

Collection Tool
Compare targets and active object portfolios

Solves these problems:
• We’re looking at CINAHL Plus with Full Text. How does this database compare with the CINAHL we already have?

• What full-text journals do we pay for in more than one database?
Ask lots of questions

• Targeted purchasing decisions begin with strategic thinking by subject librarians

• Resource activation and user accessibility begin with details mastered by Serials, Acquisitions, and DID

• Collection Tools offer assistance with both activities when resources touch SFX

• What potential do you see for efficient, strategic collection development?
Complete course contents

- Included on your flash drive:
  - SFX Basics 1: Behind the Get It Button
    - Course slides
    - Game materials & instructions
    - Feedback form
  - SFX Basics 2: The Service Desk’s Guide to Get It
    - Course slides
    - Feedback form
  - SFX Basics 3: Useful Usage Data
    - Course slides
    - SFX Queries handout
    - Feedback form
  - SFX Basics 4: Collection Development Power Tools
    - Course slides
    - SFX KBTools handout & demo reports
    - Feedback form
  - K-State Libraries Strategic Plan
Common Elements: SFX Basics Series

- Ordinary definitions of SFX jargon
- A live demonstration or participatory activity
- Real-world problems & scenarios applied to SFX processes & tools
- Discussions relevant to staff responsibilities
- Time for questions about SFX services
- Feedback solicited & encouraged
K-State Libraries’ 2007-2012 Strategic Plan

All about organizational change:
“…[W]e must foster a flexible, adaptable, and creative environment to meet…changing needs.”

SFX Basics supports goals & objectives for:
- collections
- access
- staffing
Goal: Collections

“Our users will find collections tailored and managed to meet their changing needs and advance the priorities of the University.”
Goal: Collections
Objective 1.1

“We will develop dexterous methodologies to better understand the usage of our collections and the current and future needs of users in order to make informed decisions in collections development and management.”

✓ SFX Basics 3: Useful Usage Data
Goal: Collections
Objective 1.2

“We will articulate and implement a comprehensive development and management policy for collections, providing a framework for targeting future acquisitions on user needs and institutional strengths while reducing acquisitions in other areas.”

✓ SFX Basics 4: Collection Development Power Tools
Goal: Access

“Our users will have seamless, user-driven access to reliable information, scholarship, and services when and where needed and have opportunities to learn how to effectively use and apply these resources.”

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Goal: Access
Objective 2.1

“We will enable users to interact with our services through emerging or user-familiar technologies.”

✓ SFX Basics 1: Behind the Get It Button
✓ SFX Basics 2: The Service Desk’s Guide to Get It
Goal: Access  
Objective 2.2

“We will simplify access to our services and our collections.”

✓ SFX Basics 1:  
  Behind the Get It Button

✓ SFX Basics 2:  
  The Service Desk’s Guide to Get It
Goal: Staffing

“Our internal capacity will expand so we can deliver 21st-century library and information services aligned with the University’s missions and academic priorities.”
Goal: Staffing

Objective 5.1

“We will foster an organizational culture based on mutual respect, understanding, and commitment to the work of the Libraries by facilitating effective internal communication and openness in decision making.”

✓ SFX Basics series
Goal: Staffing
Objective 5.2

“We will develop mechanisms to better understand the needs of our users, assess our effectiveness in meeting those needs, and incorporate those needs into our services and collections.”

✓ SFX Basics series
Goal: Staffing
Objective 5.5

“We will provide continuous learning opportunities for all staff to ensure that every staff member has the opportunity to keep up with developments in their field and develop practical skills needed by the Libraries.”

✓ SFX Basics series

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Change and the strategic plan

Strategy

“the art of devising or employing plans…toward a goal”

K-State Libraries’ goal

“flexible, adaptable, and creative”

To meet this goal?

Change the organization

To change the organization?

Change individual’s behavior

Definition - --Merriam-Webster Online Dictionary
**Now is SFX Basics strategic?**

**No:**
- The series made few lasting changes to staff behaviors.
- The tools presented in the series have not been systematically included in workflows.
- Staff members choose which, if any, tools to use.
Could SFX Basics be strategic?

Yes:

- When multiple messengers speak to all levels of the organization
- When administrators explicitly encourage, support, and reinforce
- When the organization holds itself accountable for learning and doing
Conclusions

- Is the series worth repeating?
  - Yes, with changes

- Were the series goals met?
  - In part:
    - Exposed staff to previously unknown tools
    - Changed few behaviors

- Best long-term outcome so far?
  - Many staff remember who to ask about problems related to SFX
Questions & Discussion

Thanks for attending!

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