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## Adapting & Evolving: Mapping New Routes

Kate Seago

*University of Kentucky*, [kseago@email.uky.edu](mailto:kseago@email.uky.edu)

Mary Beth Thomson

*University of Kentucky*, [mbthomson@uky.edu](mailto:mbthomson@uky.edu)

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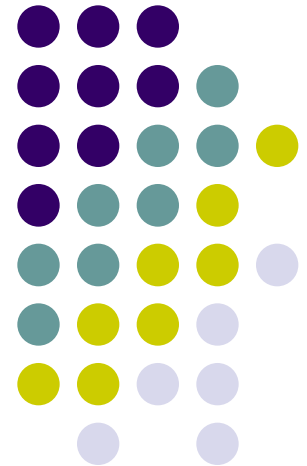
# Adapting & Evolving: mapping new routes

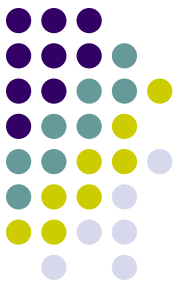
Presented by:

**Kate Seago**  
Head of Acquisitions  
University of Kentucky Libraries

and

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

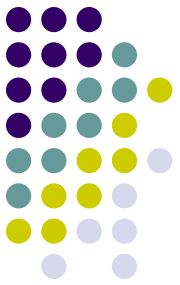




# ARL Supplementary Statistics 2002-03

- 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>



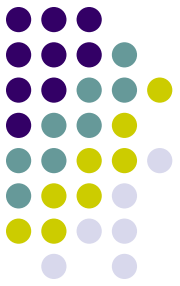
# What's new?

- 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



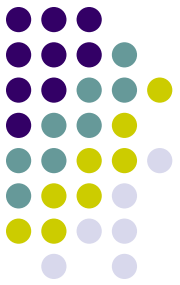
- Closer working relationships between electronic resources, serials, bibliographic access, and public services
- Workflows that cross traditional departmental or division lines
- Workflows with added complexity
- Processes that include the need for more people and systems involvement
- Evaluated and re-designed procedures and policies

# Skills and expertise



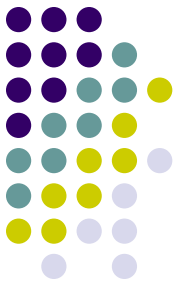
- Ability to analyze data
- Data loading and management in large quantities
- Independent judgment and decision making skills
- Statistical assessment
- Project management skills
- Knowledge of current metadata schemas, standards, and protocols
- Knowledge of OpenURL link resolvers
- Knowledge of electronic 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





# UNIVERSITY OF KENTUCKY

## EXPERIENCE



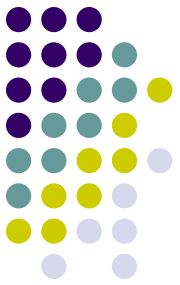
## BACKGROUND

- 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

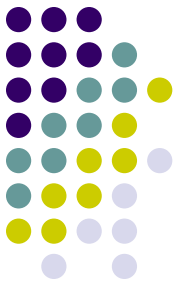




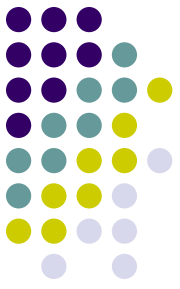
# Reporting Lines

- 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



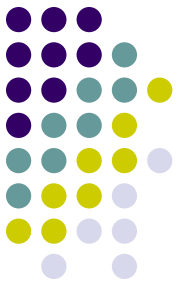
# Position Changes/Additions

- 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

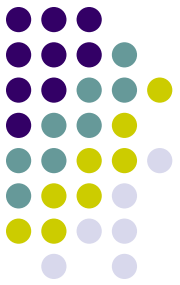
- Recognition that this is not a linear process
- Close cooperation from all parties involved is needed
- Need to be adaptable and alert to ways to prevent bottle necks or items disappearing into black holes



# Workflows

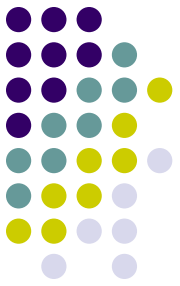
- Electronic resource form
- Vetted by ER coordinator and IT if from new source
- Purchased approved by Collection Advisory Committee
- Licensing issues handled between ER coordinator and Associate Dean





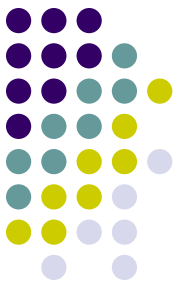
# Workflows - Continued

- 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.



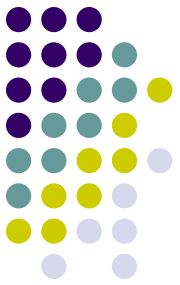
# Workflow

- 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

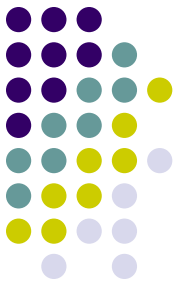
- If packages are purchased they follow a similar model, except the purchase order is usually on package level record and a spread sheet of the individual titles goes to Database Integrity
- MARC records may also be purchased and loaded if appropriate and are currently handled by Head, Acquisitions.



# 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



Kate Seago  
Head, Acquisitions Dept.  
2-21A Young Library  
University of Kentucky  
Lexington KY 40506-0456  
Tel (859) 257-0500x2120  
kseago@email.uky.edu

Mary Beth Thomson  
Associate Dean for Collections  
and Technical Services  
1-85 Young Library  
University of Kentucky  
Lexington KY 40506-0456  
Tel (859) 257-0500x2143  
mbthomson@uky.edu