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You’ve Flipped: The Implications of e-Journals as Your Primary Format

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You’ve Flipped: the implications of e-journals as your primary format

By Kate Seago, University of Kentucky, Head, Acquisitions
University of Kentucky Facts

- ARL land grant w/ 1 campus
- ILS is Voyager since 2001
- WorldCat Local as discovery tool
- Linkresolver is SFX
- KYVL statewide consortium
- KY Largest state assisted school
- Regional federal depository for KY
- 24,916 FTE
• ARL Statistics on Resources
  – 25,699 (purchased e-journals)
  – 9,152 (full text e-journals purchased)
  – 4,123 (shared access & GPO titles)
  – 327 (electronic reference sources)
  – 25,061 (serial subscriptions paid)
  – 10,765 (serials not paid for)
  – 31,897 (total serials subscriptions)

78% print primary
• ARL Statistics on Resources
  – 49,429 total serial subscriptions
  – 46,512 e-journal subscriptions
  – 2,917 print subscriptions
  – 38,218 not purchased includes consortia, gifts and federal docs titles

We have 95% of the serial subscriptions as e-only
What happened?

- Budget constraints forced a choice between print or online.
- Space for storing the print became an issue particularly as branch libraries combined.
- User demand generally favored the online format.
- University increased the number of online classes being offered.
• Budget could not sustain print plus e-only
• Format changes allowed us to retain content
• Perpetual Access options improved (LOCKSS, Portico)
• Trend where journal is only available as electronic
Organizational Changes 2005

• Acquisitions
  – Centralized except for Law and Medical Center
  – Three units – Electronic Resources, Serials and Monographs
  – Staffing resources
    • 1 librarian for Electronic Resources
    • 5 technicians for Print Serials
    • 5 technicians for Monographs
    • 1 Department Head
Acquisitions Org Chart 2005

Head, Acquisitions
Leads department in achieving goals
Coordinates with other library areas

Coordinator, Monographs
Manages monograph workflow;
Handles problems
Provides training

Library Tech
Orders, pays, catalogs
GOSI export, BN invoices

Library Tech
Credit Card orders, pays,
catalogs FA

Library Tech
Orders, pays, catalogs

Coordinator, Serials
Manages print serials workflow
Manages fed docs workflow
Manages library techs, students

Library Technician – Check-in
Check in. Routine

Library Technician – Check in

Library Technician – MSS
Standing orders

Library Technician – Fed Docs
Verification shipments
Claims

Student Assistants, GAs, Interns
Mail, check-in, other tasks

Coordinator, Electronic Resources
Manages ER workflow
Responds to problems

GA or Library Intern
Usage Stats
Link Checking
Title verification
2005 Acquisitions Priorities

• Focus was on integrating the print check-in into one process
• Establishing an effective workflow between Monograph Acquisitions and Access Management
• Moving Federal Document Check-in to Acquisitions Staff
• Getting permanent staff for the ER unit besides the librarian
2006 Electronic Resource Priorities

• Get SFX linkresolver running
• Establish an effective workflow for moving materials from print to e-only which includes updating the acquisitions and cataloging records
• Pull the various license documentation together into one central location
2006 Strategic Decisions

- SFX is our record of e-journal holdings
- SFX A-Z list is the public view for e-journals
- Electronic Resource list for databases and e-books
- Voyager catalog will include records for primarily subscribed and stable electronic resources.
Changes in Print Serials

• Use the Voyager check-in module to full advantage
• Use students assistants for check-in of journals
• Move from hand written labels to printed labels
• Provide good documentation
• Be prepared to be flexible about tasks
Changes in Claiming

- Use an Access Report from Voyager
- Reduce number of times an item is claimed
- Close out claims after reasonable period
- One time project to replace missing issues
- Notify Binding when claims will not be filled
Keep Information Flowing

- Notify Binding or branches when last issues arrive
- Notify Cataloging and Metadata when records need to be closed out or updated
- Receive information back and complete the process
- Tracking the complicated close out process
Changes for Federal Docs

- Develop good documentation and forms
- Reduce print and microform copies
- Integrate with serials workflow
- Develop familiarity with federal documents within Acquisitions
- Move activities to student assistants when possible
Changes in Monographs

- Copy cataloging handled in Acquisitions
- Increased shelf ready books
- Increased approval plans
- Decrease credit card orders
- Tested software and looked at various workflow options
- Began handling title by title e-books
Changes in Electronic Resources

• Establish a workflow to identify titles for Access Management needing catalog records
• Establish centralized location for licenses
• Migrate data from the old EJAG database to SFX
• Improve accuracy of acquisitions records in Voyager
Staffing Changes 2006 to 2009

- Moved Library Technician position from Monograph Acquisitions to Cataloging and Metadata Unit
  - Increase resources for providing cataloging records in Voyager

- Added Senior Library Technician to Electronic Resources
  - Started work on a database for staff to improve the information readily available on electronic resources
Licenses are Organized

- University requires a license for each electronic resource purchased
- Establish a single known spot
- Started spreadsheet with accession number
- Scan all the licenses
ERM was not feasible
Access database to help library staff track information on e-resources
License information
Renewals
Packages
Platforms
Logins & Passwords
• Discussion underway in 2009
• Majority of journals handled by Electronic Resource Unit
• Reconcile two different check-in processes
• Address concerns about responsiveness
• Shift staff over to Young
Acquisitions Org Chart 2010

Head, Acquisitions
- Leads department in achieving goals
- Coordinates with other library areas

Coordinator, Serials
- Manages print serials workflow
- Manages fed docs workflow
- Manages library techs, students

Coordinator, Monographs
- Manages monograph workflow
- Handles problems
- Provides training

Library Tech
- Orders, pays, catalogs
- GOBI export, BN invoices

Student, GAs, Library interns
- Assist with mail, approval plans, paper check in, renewals, verification of electronic resources, usages stats, ER database maintenance as needed.

Library Technician - Check-in
- Performs paper check-in
- Assists with federal documents

Library Technician - Claiming
- Checks in federal documents
- Manages paper claims

Library Technician - MSS
- Check in, invoicing for MSS
- Check in federal documents

Library Technician (Med Center)
- Invoicing
- Serial Cancellations
- SFX updates

Library Technician (Med Center)
- Check in serials
- Assist with federal docs

Coordinator, Electronic Resources
- Manages ER workflow
- Responds to problems
- License negotiations
- Troubleshooting

Senior Technician
- Invoicing electronic resources
- License management
- SFX updates
- Copy cataloging of resources

Senior Technician
- Manages ER database
- SFX updates
Staffing Changes in 2011

- Move library technician to information literacy
- Move library technician position to Electronic Resources Unit
- Shift handling of monographic series to Monograph Acquisitions
- Hire new staff for two new positions
Serials Review 2011 and Beyond

• Format changes are no longer a significant part
• Challenges of balancing packages versus individual titles
• Cancellation of online titles
• Providing better data to make informed decisions
  – Usage, ILL, Impact factor
• Database goes live for staff
Staff Database Unveiled

By Josh Harris & Ed Brown

Welcome to the UK ERMS Search Interface

Enter search text: journal of chemical education

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<th>Title ID</th>
<th>Title</th>
<th>ISSN_print</th>
<th>Current Publisher</th>
</tr>
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<tbody>
<tr>
<td>Select</td>
<td>Journal of chemical education</td>
<td>0021-9584</td>
<td>American Chemical Society</td>
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</table>

- Platform_Name: American Chemical Society
- Collection_Name: American Chemical Society General
- Voyager Bib ID: 2361738
- Vendor: Ebso
- E_resource_URL: http://pubs.acs.org/jceeda#
- Full Text Coverage Dates: FROM Year 1996
- Full Text Coverage Dates: FROM Vol 73
- Full Text Coverage Dates: FROM Number 1
Implications for Acquisitions

• Print will not be primary format
• Workflows will need to be evolving and flexible
• Balancing access and ownership
• Staff will need more problem solving abilities
• Increase interaction with public service and users
Implications for Acquisitions

• Monograph collection has begun the shift to digital

• Options
  – Patron driven acquisitions
  – Packages, sets
  – Individual titles
  – Rentals

• Will the distinction between journal and monograph hold?
Implications for Acquisitions

• Next Acquisitions system has to handle electronic resources whether they are books, journals, databases, collections, packages or some new form yet to be imagined.

• Manage contracts, licenses and usages statistics.
Facing these Challenges
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