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
- Linkreslover 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
  - GOBI export, BN invoices

- **Library Tech**
  - Credit Card orders, pays, catalogs
  - FA

- **Library Tech**
  - Orders, pays, catalogs

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

- **Library Technician – Check-in**
  - Check in. Routine

- **Library Technician – Check in**
  - MSS
  - Standing orders

- **Library Technician – Fed Docs**
  - Verification shipments
  - Claims

**Coordinator, Electronic Resources**
- Manages ER workflow
- Responds to problems

- **GA or Library Intern**
  - Usage Stats
  - Link Checking
  - Title verification

- **Student Assistants, GAs, Interns**
  - Mail, check-in, other tasks
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 link resolver 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.
One of our 10 campus libraries: The Design Library is located in Pence Hall.
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
Medical Center Merger 2010

- 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

Library Tech
Credit Card orders, pays,
catalogs FA

Library Tech
Orders, pays, catalogs

Students, 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
Current Organizational Chart

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

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

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

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

Senior Technician
- Reviews electronic resource renewals
- License management
- SFX updates
- Copy cataloging of resources

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

Library Tech
- Credit Card orders, pays, catalogs
- FA

Library Tech
- Orders, pays, catalogs
- Receives MSS

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

Library Technician – Check-in
- Performs all paper check-in
- Assists with federal documents
- Assists with renewals as needed

Library Technician – Fed Docs
- Checks in federal documents
- Manages paper claims
- Backs up paper check-in
- Assists with renewals as needed

Library Technician – Invoices
- Invoices
- Renewals
- License verification
- Assisting with title list verification
- Reporter

Library Tech
- Usage statistics
- SFX updates
- ER database updates
- Troubleshooting

Senior Technician
- Manages ER database
- Lead Troubleshooter
- SFX updates
• 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
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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