

Managing eResource content in the online world

Overview

- What is an eResource?
- DMU context
- “Lifecycle” approach to eResources management
 - **Selection & purchase**
 - **Access delivery & discovery**
 - **Manage & review**
- Focus on practicalities, challenges & opportunities
- Examples of DMU Library services & processes

Who am I?

- Joined DMU Library in 2002 (checking-in print journals), overseeing eResources portfolio since 2010
- Currently work in Content Delivery Team – budgets, publisher liaison, authentication, usage analysis and troubleshooting
- Current member of JUSP advisory group: co-presented session for JUSP at Digifest 2015
- Produced “librarian friendly” guides for COUNTER 4 in 2016
- Presented at 2018 UKSG “Intro to eResources” event

What is an eResource?

- **eJournals**
- **eBooks**
- **Full text databases**
- **Bibliographic databases (non-full text)**
- **Libraries provide access to licensed/subscribed content and open access titles.**

DMU context



DMU online portfolio

- Separate faculty budgets for journals, books & online databases
- Central budget for cross-subject resources
- **E-first strategy** (where possible), prioritise reading list material

For 2017-18...

- **52,500+** eJournals purchased (individual subs or part of a collection)
- **850,000+** eBooks (individually purchased titles or part of a collection)
- **50+** licensed online databases plus multiple Open Access resources

The importance of eResources!

For 2017-18...

- 51% of library stock budget spent on eResources (tipping point reached?)
- 6% of library stock budget spent on DDA (Demand-Driven Acquisition) scheme for reading lists content & digitisation

SCONUL 17/18 figures

- Total article downloads (COUNTER 4 JR1) = **> 2,000,000**
- Total eBook section requests (COUNTER 4 BR2) = **> 2,400,000**

Selection & purchase

Criteria for selection

- Relevancy
- Cost & (available) budget
- Content format
- Subscription type/length
- Provider
- Years of access/preservation
- Access set up – involve IT?
- Authentication
- Unique or duplicated content?
- Open access alternatives
- Concurrent users
- User experience

Financial factors

- Annual price increases
- Multi-year discount vs ability to cancel – **can the library commit for 3 years?**
- Added value via content/system bundles
- VAT on online products
- Exchange rate fluctuations (unforeseen?)
- Internal finance/procurement procedures

Licensing factors

- Licence defines the obligations of the institution
- Authorised users defined (walk-in visitors, Alumni)
- Opt-out/cancellation notice periods (e.g. Jisc licences)
- Partner institutions
- Course packs, interlibrary loans, Virtual Learning Environment (VLE) use
- Digital Rights Management (DRM) limits
- Post-cancellation access

Access delivery & discoverability

Making good connections

- Seamless access points – remove “clicks”, reduce complexity
- Article-level access? Depends on provider
- Standard & consistent access pathways/terminology required across publisher interfaces
- Device or web browser issues
- User “frustration” can harm student experience of eResources = poorly used subscriptions?

Authentication methods

- IP access (on campus)
- Shibboleth/OpenAthens (off campus)
- UK Access Management Federation
- Proxy service (e.g. EZProxy)
- WAYFless URLs for eBooks, website links
- Miscellaneous username/password – hosted securely, extra barrier to access?

DMU Single Sign On



Single Sign-On to Library Resources

Please Log In Need Help?

Username: Please use lower case letters

Password:

Login

To safeguard your data ensure all web browser windows are closed when you have finished using the computer.

About Single Sign-On

Single Sign-On to Library Resources allows you access to most internet resources covered by university subscriptions.

If you'd like to change your password, please visit [Password Self Service](#). While you're there you should also set your security questions. These can be used to reset a forgotten password at any time.

Licensed resources are governed by [regulations](#). Logging on to internet resources covered by university subscriptions denotes acceptance of these regulations.

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Discoverability: library systems

- Reading list software (DMU Resource Lists/Talis Aspire)
- Discovery service (Library Search/Summon)
- Library catalogue (Capita)
- Link resolver/eJournal A-Z (360 Link/Find it @DMU)
- LibGuides – online subject guides & new library website
- LeanLibrary browser extension

Summon (Library Search)

The screenshot shows the Summon library search interface with the query "adaptation studies" entered in the search bar. The results are sorted by relevance, showing 1,678,360 items. The results list includes:

- 1.** *Adaptation studies: new approaches* by Albrecht-Claire, Christa; Cuthes, Dennis R. (2010). Includes links for eBook: Check Availability and eBook: Full Text Online.
- 2.** *Adaptation studies: new challenges, new directions* by Bruun-Jensen, Geir; Gjelsvik, Anne; Hansen, Edita Finsvold (2013). Includes links for eBook: Check Availability and eBook: Full Text Online.
- 3.** *The Bloomsbury introduction to adaptation studies: adapting the canon in film, TV, novels and popular culture* by Gross, Lynne (2016). Includes link for Book: Check Availability.
- 4.** *Descriptive adaptation studies: epistemological and methodological issues* by Catysse, Patrick (2014).

On the left sidebar, there are filters for DEFINE YOUR SEARCH (Text Online, Scholarly & Peer-Review, Peer-Review, Open Access, Library Catalogue), CONTENT TYPE (Journal Article, Book / eBook, Publication, Book Review, Magazine Article, More...), DISCIPLINE (Medicine, Biology, Engineering, Anatomy & physiology, Psychology, More...), and PUBLICATION DATE (with a slider from 2000 to 2014). Top navigation includes a star icon, a search icon, and links for New Search, Advanced search, and a user profile.

Troubleshooting

- Off campus laptop – mimic remote users' access steps
- Online support via LibGuides – eResources/eBooks
- Manage user enquiries via LibAnswers – track queries & replies, assign work, set up library FAQs
- LibChat/WhatsApp – offer wider library user support
- Content Delivery staff representation at assignment sessions
- Presentations for library staff to help develop their digital capabilities (e.g. Learning at Work Week)

LibAnswers

Eresources only queue view ▾ Pending Comments (0) Pending Ideas/Votes (0) Errors (0) Spam (0) Status Posts

Queue eresources Source All Status Not Closed Owned by All Name Email Filter (clear)

Toggle All on Page — Action —

Tickets 1 - 28 (of 28)

ID	Status	Queue	Question	Last Message From	Owner	Updated
2291642	Open	eresources	FW: Prism 3: user error report; error ID = 91a6dcccfd2d2433eef077d89b3a383	User		25 May 2018, 03:05pm
			Asked via Email Library Catalogue			
2296256	Pending	eresources	Single sign on issues	User	Mitchell Dunkley	24 May 2018, 04:44pm
			Asked via Email Databases Authentication e-resources Single Sign On			
2228214	Pending	eresources	FW: Bureau van Dijk - Account manager contact details and URL for FAME interface	User		23 May 2018, 04:38pm
			Asked via Email Databases Authentication			
2281610	Open	eresources	Problem Link Report: from	User	Mitchell Dunkley	10 May 2018, 11:43am
			Asked via Email			
2286966	Open	eresources	Problem Link Report Anon (noreply@proquest.com) Asked via Email	Patron	Mitchell Dunkley	10 May 2018, 11:13am

Promotion

- Academic Liaison-led activities
- Faculty meetings/academic boards
- Specific resource sessions – awareness, onsite or webinar training provided by supplier
- Marketing via LibGuides or news stories on library webpages
- Library social media pages
- Infographics – visualise library data including spend, usage, reading list info & new resources

Manage & review

Record, track & evaluate

“Maximise the usage & impact of the information resources available to users”

- key DMU Library objective
- Value for money is important as library budgets continue to be hit!
- “Value” can be subjective and applied differently between subjects
- Move to more data-driven model for resources review – based on usage & cost analysis

Reasons for managing & reviewing...

- Good record-keeping
- Provide up-to-date metrics for academic teams
- Better informed decision making & communication across the directorate
- Comparing subscriptions/resources
- Annual SCONUL statistics
- Freedom of Information (FOI) requests
- Negotiations with suppliers

Information overload!

Where?

- ERM systems (e.g. Intota)
- Excel spreadsheets (multiple!)
- Shared drives or intranet
- Resource folders
- Email correspondence
- ...knowledge in your own head!

What?

- Sub start/end date
- Notice or opt-out period
- Financial data (e.g. invoices)
- Provider contact
- Access/authentication notes

...plus much more!

ERM system (Intota)

 **British Standards Online (EOT)**
<http://bsol.bsigroup.com/>
BSI Group
0 titles (0 books, 0 journals)

Resource Type: Database Status: Subscribed Discoverable: 360 Link, 360 Core, 360 MARC Updates, Summon Renewal Type: Manual Renewal Date: 01/04/2018

Titles (0 tracked of 0)

About Edit

Database Name: British Standards Online
Provider Name: BSI Group
Status: Subscribed
Title Coverage: ALL titles
Database Description: Definitive site for all publications from British Standards Institution, with bibliographic information for more than 39,500 documents.

Discovery Edit

360 Core: On
360 Link: On
360 MARC Updates: On
Summon: On ✓ Zero Title DB

Configuration Edit

Database URL: <http://bsol.bsigroup.com/>
Library Proxy: On

Related Actions:

[View Renewal Checklist](#)
[Add Payment](#)

Notes (0) +

Licenses (1) ×

- British Standards Online
Prevailing
Active

Contacts (1) +

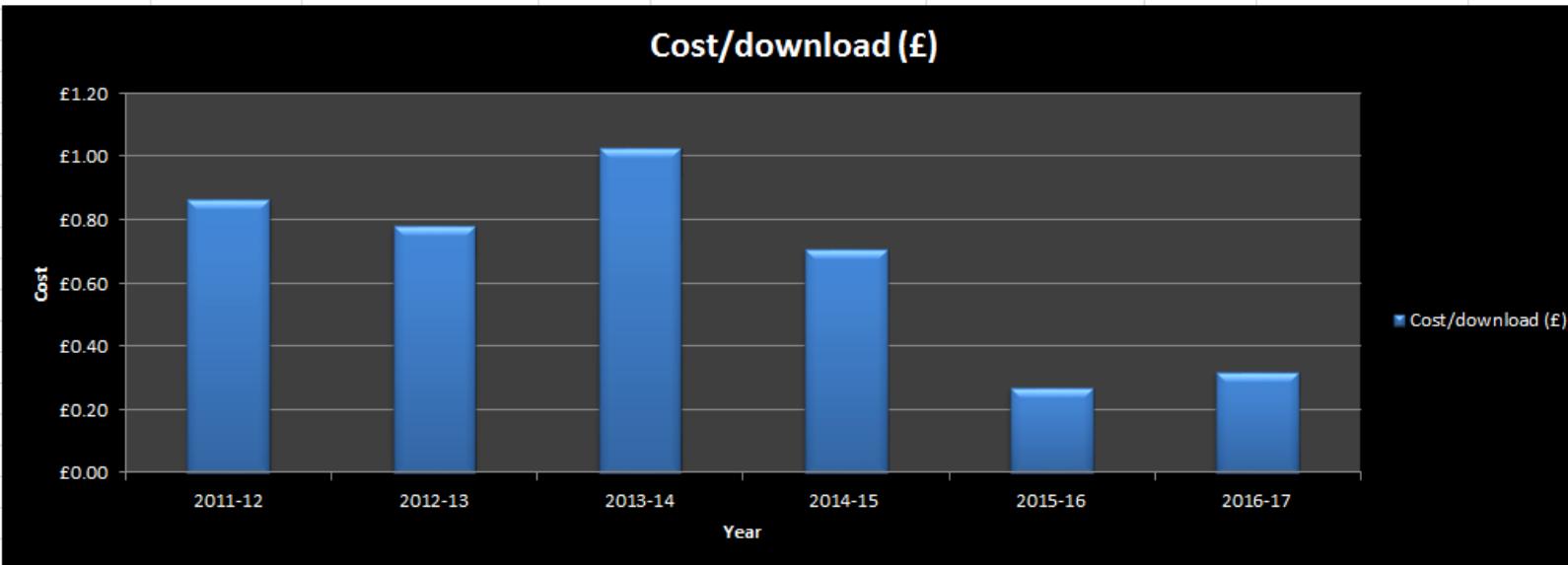
- Jisc Collections Helpdesk
help.digitalresources@jisc.ac.uk
Support, Billing, Licensing

Usage statistics

- Lots of data! Establish criteria for analysis
- Online services such as JUSP automate stats processes, free up staff time
- Data visualisation (graphs & charts) can help with interpretation
- Cost per use value – simple & basic calculation, starting point for evaluation
- eJournals/eBooks Turnaway data increasingly useful

Cost/usage template

Subscription year	Total cost (£)	Total cost change (£)	% change	Total usage (downloads)	Total usage change	% change	Cost/download (£)	Cost/download difference (£)
2011-12	£6,800			7861			£0.87	
2012-13	£6,974	£174	2.56%	8925	1064	14%	£0.78	-£0.08
2013-14	£7,200	£226	3.24%	6998	-1927	-22%	£1.03	£0.25
2014-15	£7,496	£296	4.11%	10574	3576	51%	£0.71	-£0.32
2015-16	£7,689	£193	2.57%	28294	17720	168%	£0.27	-£0.44
2016-17	£7,922	£233	3.03%	24642	-3652	-13%	£0.32	£0.05



DMU: Under Review process

- Started in 2017, monthly meetings, use Trello to track work
- Usage & cost triggers
 - **Annual usage decrease > 25%**
 - **Cost per use > £15**
 - **Annual cost increase > 5%**
- Resources that hit trigger(s) are discussed by group
- Group made of colleagues from different library teams, including senior management

Under Review “aims”

- Create more data-driven approach to resources – support collection management
- Forum to discuss resource “value” – increase collaboration & awareness across library teams
- Create action plans for low-use resources: targeted promotion, enhanced linking, cancellation?
- Ensure library is receiving return on its significant investment in eResources

Under Review - Trello

Personal | Private |

Apr 2018 meeting

- Apologies
- Journal costs workflow
⌚ 31 May 0/2
- Identify process to improve promotion of online resources in line with Social Media strategy
⌚ 31 May
- Gale database K opt-out decision
⌚ 1
- Journals renewal process - review titles with high CPU
⌚ 31 May 0/1
- Journals with free back-runs
⌚ 0/1
- EBSCO database N 2018-19 renewal
- British Journal of Z
⌚ 2
- ProQuest bundle O
⌚ 0/2

February 2018 completed

- ProQuest Database C 2018-19 renewal
⌚ 1
- Jisc agreement D - opt out decision
⌚ 1 2/2
- Add Under Review columns to journals and spend/allocation spreadsheets.
⌚ 2/2
- Eduserv agreement H opt-out decision
⌚ 1

Under Review Group - renewal outcomes

Total saved from cancelled resources:

- Law Resource A - CANCELLED
- E-Book collection B - CANCELLED
 5/5
- International Journal of Y, 38.4% increase in cost in 2017 CANCELLED

Under Review trigger points

- Resource cost per use (CPU) exceeds £15
- Annual cost increase of more than 5%
- Annual resource usage declines by 25% or more
- Add a card...

Summary

- Complexity of eResources admin is not going away! Need flexible systems & solutions to support libraries
- Budgetary pressures – libraries asked to do “more with less”, is this possible in current climate (HE funding/Brexit uncertainty)
- Increasing OA content – “Plan S” & its potential effect on subscriptions, library spend & access
- Students at the heart of library service delivery
- Share experiences/examples of best practice (UKSG events can help!)
- **“How does your institution measure the value of its eResources?”**

Thank you!

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