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

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
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)
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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)
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

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<th>Subscription year</th>
<th>Total cost (£)</th>
<th>Total cost change (£)</th>
<th>% change</th>
<th>Total usage (downloads)</th>
<th>Total usage change</th>
<th>% change</th>
<th>Cost/download (£)</th>
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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
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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