

Managing content in an electronic world

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Summary

- The importance of serials and e-access
- Collection development and management
- Financial management
- The renewal process
- Managing journals day to day
- Types of e-content
- Characteristics of big deals
- Promotion and delivery
- Issues relating to e-access
- Preservation and archiving content
- Electronic Resources Management Systems (ERMS)

Some definitions

“Serial” source Anglo American Cataloguing Rules 2 (AACR2), 2002

A continuing resource issued in a succession of discreet parts, usually bearing numbering, that has no predetermined conclusion. Examples of serials include journals, magazines, electronic journals, continuing directories, annual reports, newspapers, and monographic series.

“E-resource” source Anglo American Cataloguing Rules 2 (AACR2), 2002

Material (data and/or program(s)) encoded for manipulation by a computerized device. This material may require the use of a peripheral directly connected to a computerized device (e.g., CD-ROM drive) or a connection to a computer network (e.g., the Internet).

Why are serials important?

- Quick way of communicating ideas and information
- Quality assured through means of peer review
- Lasting record of material for future generations
- Primary means of finding out about new research and sharing results from work within an institution
- Allow organisations to keep up to date with current and accurate information in their field
- Excellent resources to support or supplement new research

Why is e-access important?

- Accessibility (anywhere, anytime, 24/7)
- Convenience (especially with mobile devices); allow 'working on the move'
- Integrated access to other resources through link resolvers and federated search engines
- Allows distance learning/widening participation much more easily
- Addresses some problems of physical space in libraries
- Integration with interactive Web 2.0 technologies
- Ease of use for those used to digital media

Collection development and management



- Kingston University has over 1,500 print journals and over 45,000 e-journals, as well as a growing collection of e-books.
- Journals and database subscriptions are dealt with within one sub-team of Collections, books and e-books in another sub-team. Recent split of duties.
- Cataloguing and systems team input essential
- Links with institutional repository, VLE, intranet, licensing
- Library Management System: Aleph
- Electronic Resource Management System: SFX/Verde

- Kingston has a Collection Development Policy and Journals Retention Policy to inform further expansion
- 'E' seen as primary format, mainly through national consortia
- Kingston is part of the UK Research Reserve scheme
- Annual decisions on cancellations, renewals and new subscriptions, depending on:
 - Budget
 - New courses and research
 - Non-cancellation clauses
 - Usage
 - New deals available

Financial management

- Financial year runs August-July
- Budget split into topslice, book fund, journal fund, standing order fund, e-resource fund (with sub-fund for e-books) and delegated to faculty teams
- Renewal cycle for journals runs June-October
- Renewal cycle for 'big deals' varies (many national deals run January-December)
- Constant monitoring on what has been paid, price rises, change in pricing policies, journal transfers, value for money
- Usage becoming of more importance

- Some issues for Kingston:
 - Cuts in budget for 2011/12 financial year
 - Price inflation on some journals beyond the average
 - Exchange rates
 - Non-cancellation clauses
 - Top-slicing
 - VAT on e-only titles and packages
 - Finding the right balance between what is wanted, what is needed, and what has to be kept

The renewal process: e-resources

- Big deals on multi-year contracts automatically renewed
- Consortia deals evaluated for value (usually announced in the last quarter of the year)
- Deals coming to an end evaluated to see if worth keeping
- Individual titles evaluated (and those locked into non-cancellation clauses are identified)
- Abstract and index databases of lesser importance than full-text
- Multi-year deals preferred for stable pricing (but with opt-out clause)

The renewal process: print titles

- List of titles made available to subject teams throughout the year and potential format changes (print only to print and e or e-only) identified
- Titles in non-cancellation clauses are flagged
- Changes in publisher and pricing policy are flagged if they are known
- Substitutions finalised where allowed
- Duplicate subscriptions at more than one site not supported unless evidence of need or very low cost

Managing journals day-to-day

Print

- Checking-in
- Claiming
- Invoicing
- Binding
- Title changes
- Format changes
- Some material discarded on receipt

E-journal

- Check that access is available
- Authentication
- Add to ERM
- Troubleshoot where necessary
- Claiming
- Title changes and transfers

Types of e-content

Journals

- Individual subscriptions, either with print or e-only
- Part of 'big deal'
- Part of a database or aggregator
- Backfiles
- Open access or free

Books

- Outright purchase or subscription
- One user or multi-user
- Part of a database
- Part of a big deal
- Individual title or package
- Digital rights management (DRM)

Characteristics of 'big deals'

- Can be national opt-in deal, or regional, or specific to one agent
- Usually large bundles of titles (could be everything from one publisher)
- Tied in to historical print spend (or no-cancellation clauses)
- Often made up of an access fee and perhaps an additional fee for unsubscribed content
- Multi-year deal with guaranteed price-cap
- Negotiated for maximum discounts
- Extremely advantageous as much cheaper than subscribing to individual titles
- Newer deals now allow 'opt out' during the term of multi-year subscription

Promotion and delivery

- Promote titles through A-Z, link resolvers, MARC records, federated search, catalogue
- Use varied channels for promoting content (RSS, blogs, twitter, intranet, ERM)
- Use Google Scholar, databases to link through to content
- Check on usage to see if increased awareness = increased downloads and searches
- Provide help where needed

Issues relating to e-access

- Authentication (Shibboleth, Athens, IP ...?)
- Publisher policies and licensing
- Embargoes or moving archives
- Location of user (on- or off-campus, UK or international)
- Technical set-up (browsers, PC/MAC/laptop, particular software)
- E-resources life cycle (selection, purchase, activation, making available, troubleshooting, reviewing, renewal or cancellation)
- Post-cancellation access

Preservation and archiving content

- Archiving content after cancellation:
 - Perpetual access clauses in licences
 - Collaborative archives (LOCKSS, PORTICO)
 - Local hosting of content
 - Format preservation (XML vs PDF)
- Who has the responsibility long-term for this (publisher – library – someone else?)
- Traditional collection model = purchase and add to stock; now lease and provide access (but for how long?)

Electronic Resource Management Systems (ERMS)

- Sometimes integrated with library management systems, but often purchased separately
- Titles are flagged as subscribed, on hold, etc.
- Allows financial and licensing data, holdings etc to be recorded in one place
- Can link to OPAC (by uploading MARC records and populating with information)
- Can take data from LMS (for example on invoicing)
- System for staff use which organises e-content for the end user
- Essential to have a system for e-resource management

Thank you!



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