Managing content in the electronic world
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- wholly postgraduate
- research led
- real-world industry focus
- five schools:
  - Health
  - Applied Sciences
  - Engineering
  - Defence and Security
  - Management
- industrial scale facilities
- diverse student population
- staff:student ratio

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What do we mean by content?

- Journals (both print and electronic)
- Books (both print and electronic)
- Databases (full text and A&I)
- Grey Literature, including reports (both print and electronic)
- Theses (both print and electronic)
- Conference Proceedings (both print and electronic)
- Research Data (print and electronic)
The move from print to electronic

• Convenience for the user – accessibility (anywhere, anytime, at the point of need)
• Can be used simultaneously by more than one user (as long as licensing allows)
• Integrated access to full text from link resolvers, federated search engines or discovery services
• Searchability
• Ability to annotate / highlight
• Interactive features
The move from print to electronic

- Addresses some problems of physical space in libraries
- Ability to satisfy user demand for more copies
- No circulation (i.e. no issuing, returns, overdue/recall notices, shelving, no reservations, – never gets lost!)
- No processing
- No classification
- Able to make available to user significantly faster
Issues relating to electronic access

- Authentication (Shibboleth, Athens, IP)
- Location of user (on or off campus, UK or international)
- Technical set up (browsers, PC/Mac/mobile devices)
- Embargoes or moving archives
- Publisher policies and licensing
Licensing

- Single or multi-site
- Authorised users, walk-in users
- Use for ILL, VLEs, course packs
- Use by partner institutions / franchised course
- Post-cancellation access
- Indemnity clauses
Periodical literature (also called a periodical publication or simply a periodical) is a published work that appears in a new edition on a regular schedule. The most familiar examples are the newspaper, often published daily, or weekly; or the magazine, typically published weekly, monthly or as a quarterly. Other examples would be a newsletter, a literary journal or learned journal, or a yearbook. These examples are typically published and referenced by volume and issue. "Volume" typically refers to the number of years the publication has been circulated, and "Issue" refers to how many times that periodical has been published during that year.

Wikipedia
http://en.wikipedia.org/wiki/Periodical_literature
• Extremely important to research (and research funding)
• Frequently published – allowing fast dissemination of ideas and information
• One of the primary ways to find out about new research, and for academics to keep up with developments in their field of expertise
• Quality assured through peer review
• Means of sharing the results of new research and engendering collaborative working
Day to day management of journals

Print:
• Ordering new titles
• Check-in (some issues discarded on receipt)
• Claiming for missing issues
• Title / publisher changes (creating / amending records on library catalogue and link resolver)
• Frequency changes (amending prediction patterns on LMS)
• Ceased titles (requesting credit, amending records on library catalogue and link resolver)
• Binding
• Invoices
Day to day management of journals

Electronic:
- Ordering
- Check that access is available (including different authentication methods)
- Add record to library catalogue and switch on in link resolver
- Title / publisher changes (create / amend records on library catalogue and link resolver)
- Ceased titles (requesting credit, amend records on library catalogue and link resolver)
- Add scanned licence to shared area (ERM)
- Collect usage statistics and add to shared area (ERM)
- Respond to access queries
- Invoices
Purchasing journals

- Individual subscriptions – print, print with electronic, electronic only
- A ‘big deal’
- Included in a database
- Backfiles / archives
- Open Access or free
- Access models – institutional or site specific access
Big Deals

• Usually large bundles of titles (maybe everything from one publisher)
• National opt-in deal, regional, consortia
• Multi-year with agreed pricing for all years or price cap (may have an opt-out clause)
• Subscribed titles, access fee for unsubscribed titles
• Cheaper than subscribing to individual titles
• Can be tied into historical print spend (required to maintain spend or subscriptions, sometimes include substitution and cancellation allowances)
• Reduces choice at renewal time
A monograph is a work of writing upon a single subject, usually by a single author. It is often a scholarly essay or learned treatise...

...Librarians consider a monograph to be a nonserial publication complete in one volume (book) or a finite number of volumes. Thus it differs from a serial publication such as a magazine, journal, or newspaper.

Wikipedia
http://en.wikipedia.org/wiki/Periodical_literature
• **Textbooks**
  Give a useful overview of a particular area, do not usually offer original research or theories – aimed at taught course students

• **Scholarly monographs**
  Self contained (not a serial or part of a series), offer original ideas or set of arguments and attempts to expand the frontiers of knowledge in a particular field – aimed at researchers

• **Reference** (dictionaries / encyclopaedias / atlases)
Day to day management of books

Print
• Order new titles / copies
• Chase orders
• Receipt
• Invoices
• Cataloguing (downloading records from OCLC)
• Create / amend records on library catalogue and link resolver
• Processing / completing processing
• Shelving
Day to day management of books

Electronic:
- New titles
  - Ordering
  - Check that access is available (including different authentication methods)
  - Add record to library catalogue
  - Switch on in link resolver
- Add scanned licence to shared area (ERM)
- Collect usage statistics and add to shared area (ERM)
- Ceased access to titles (amend records on library catalogue and link resolver)
- Respond to access queries
Purchasing Books

- Individual title or a package
- Outright purchase or subscription
- Access models – single or multi-user, total accesses
- A ‘big’ deal
- Part of a database
- Via a aggregator or publisher
- Digital Rights Management (DRM)
- Patron Driven Acquisition / Evidence Based Selection
Databases

- Definition - an organised collection of data
- Can be full text or abstract and index, or mixture of both
- Can include any content type or combination of several
- Some restricted to certain subject areas
- Might not be designed for the academic market
- Purchase via national deals, or direct with supplier
- Listed on Resources A-Z on library websites
Grey literature /reports

• Phrase coined by librarians to define written material such as reports and working papers that are difficult to find via conventional channels
• Such material is now easier to find due to bodies including government publishing freely available on the web
• Some databases are available that cover reports from certain organisations such as AIAA
• Otherwise purchased as individual print copies from book budget
• Added to the library catalogue
• Difficulties with link resolvers
Conference Proceedings

- Contain new research that may have not made it into a book or journal, but has been presented at a conference
- Less quality control and are not as well indexed as books or journals so can be difficult to locate
- Can be a primary source of research information in some fields
- Can be expensive.
- If not within databases, are generally in print or on CD-ROMs
- Individual papers added to the library catalogue if particularly important
- Difficulties with link resolvers
Theses

- Submitted in support of an academic degree
- Considered part of the intellectual output of the University
- Students are now required to submit electronically
- Stored in repositories - PhD theses at Cranfield go into institutional repository unless restricted
- Added to library catalogue with link to full text in repository
Collection development

- Cranfield University:
  - 32,549 serial titles, of which all but 107 are available electronically.
  - 478,995 books, of which 14,214 are available electronically.
  - 203 electronic databases.
  - Approx 8,000 items in our institutional repositories.
Collection development

- eResources Group make decisions on shared University eResources
- Each campus library service makes decisions on print and single site eResources (Annual Journals Review)
- Cranfield Campus Information Systems Team manage the majority of shared resources, and all Cranfield campus resources and the shared link resolver (SFX) and the discovery service (EDS)
- Both campus library services maintain their own LMS, website and repositories.
- Information relating to resources (such as copies of licences, usage statistics) is stored on a shared drive accessible by both campuses
Collection development

- Electronic format generally preferred but with some exceptions
- Annual decisions on cancellations, renewals and new subscriptions governed by:
  - Budget
  - New courses and research
  - Non-cancellation clauses
  - Usage
  - Recommended reading / publishing lists
  - Other qualitative data
Financial management

• University financial year runs August to July
• April - provide estimate costs for the next financial year to be put into budget bid
• June – provide estimated out-turns for current financial year
• July – finalise out-turns for current financial year and (hopefully) get next financial year approved
• August – December, majority of resources renewed
• September / October – finalise journal renewals
• Monitor resources budget throughout the year
• Money for resources split between a number of budgets with different budget holders.
Challenges

• Budget – cuts/ standstill
• Inflation on journals above average / and excessive increases on other resources too!
• Exchange rates
• Non-cancellation clauses
• VAT on electronic subscriptions / packages vs VAT on combined print and electronic subscriptions / packages
Archiving and preservation

Print:
• Libraries no longer have space to house long back runs of journal titles
• UK Research Reserve (UKRR) http://www.ukrr.ac.uk/

Electronic:
• Perpetual access clauses in licences (access after cancellation / cessation)
• Collaborative (dark) archives
  • LOCKSS (lots of copies keep stuff safe) http://www.lockss.org/
  • CLOCKSS (controlled LOCKSS) http://www.clockss.org/clockss/Home
  • Portico http://www.portico.org/digital-preservation/
• Format preservation (XML vs PDF)
• Who’s responsibility is it? Libraries or publishers?
eResource Lifecycle

Discovery
- Environment Scanning
- Academic Liaison
- Remove Records: SFX, Catalogue, A-Z List, eResources List, Digital Library
- Deactivate
- Academic Liaison

Trial
- Promotion
- Assessment
- Financial Planning
- Licence Terms
- Price
- Invoicing
- Orders
- Authentication
- Register/Activate
- Add Records: Catalogue, A-Z list, SFX, eResources List, Digital Library
- Shibboleth
- IP

Cancellation
- Renal Cost
- Usage Statistics
- Downtime Analysis
- Review Problems
- Holdings Alterations
- User Feedback

Support
- Software Needs
- Hardware Needs
- Training & Help Guides
- Contact Information
- Troubleshoot

Administration
- User IDs
- Admin Module
- URL Maintenance
- Use & Access Restrictions
- Missing Content
- Holdings / Title List Changes

Acquisition / Renewal

Cranfield IT
Electronic Resource Management Systems (ERMS)

- Supports acquisition and management of licensed e-resources allowing them to be tracked through the whole eResource lifecycle
- May be integrated into a LMS or may be a standalone system
- Contain a knowledgebase of information on resources such as which journals are in which package and which platforms a database in on (and to which your library has a subscription to)
- Enables information about resources to be kept in one place e.g. holdings, contact information for all content providers; financial information; licence documents, log of problems with resources, authentication details; responses to trials.
Electronic Resource Management Systems (ERMS)

- Provide customizable e-mail alerting systems (e.g. notices to managers when actions are expected or required)
- Store license documents and enable public display of key rights and clauses such as ILL, use in course packs, walk in use.
- Supports retrieval of SUSHI usage statistics
Promotion and delivery

- Journal / books etc added to library catalogue and activated in link resolver
- Library website / intranet site news and A-Z lists
- Resources blog
- Academic Support / Faculty Boards
- Inductions / training
- VLEs
- Plasma screen in library
- Facebook / Twitter
Open Access is the immediate, free-to-use access to peer-reviewed research literature. By definition, it applies to journal articles and peer-reviewed conference papers, though in practice it is extending to book chapters, monographs and research data.


Types of Open Access

• **Green OA Self Archiving**
  Authors publish in any journal and then self-archive a version of the article in an open access repository. This can be the ‘pre-print’ – before refereeing and publication, or the ‘post-print’ – the refereed accepted final draft.

• **Gold OA Publishing**
  Authors pay to publish in an open access journal which makes its content freely available online.
Future of Open Access

• Clear policy direction in the UK towards support for the Gold OA route
• Government accepted all recommendations except for the recommendation on reducing the VAT on eJournals
• Transition phase – pay twice? Extra £10 million given to 30 institutions
• RCUK – research grant applications will no longer include provision for APCs, these will be supported through block grants to UK HE, approved independent research organisations and Research Council Institutes.
• HE Funding Councils developing proposals for implementing a requirement that research outputs submitted to REF shall be as widely accessible as possible
Research Data Management

• Scientific process is enhanced by sharing research data

• Allows verification of results

• Allows new research to be built on existing information

• Most Research Councils now mandate that institutions that receive their funding have research data management plans in place, and deposit the research data arising out of that research in an openly available data centre.

• Many leading journals also require underlying datasets to be published or made accessible
RDA – Resource Description and Access

- Cataloguing standard, successor to Anglo-American Cataloguing Rules, Second Edition (AACR2)
- Due to be fully implemented by many national libraries (Library of Congress, British Library) in 2013

- The primary distinction between AACR2 and RDA is structural. RDA is organised based on the Functional Requirements for Bibliographic Records (FRBR)
- The FRBR model consists of entities, relationships, and attributes that are used to describe resources.
Thank you!

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