Managing E-resources

Everything everywhere all at once

Ruth Smalley, Edge Hill University

UKSG Introduction to E-Resources June 2024

Edge Hill University

- Based in Ormskirk in North West of England.
- Opened in 1885
- Degree awarding powers and titles of University 2006
- Very strong campus identity
- Teaching focused, but growing research identity
- Approx 13,000 students
    - c.10,000 undergraduates
    - c. 3,000 postgraduates
- Three faculties:
    - Education
    - Health (including new Medical School)
    - Arts and Sciences
- Catalyst building opened in 2018
    - Co-located services:
        - Library & Learning Services
        - Student Services
        - Careers

Ruth Smalley

Subscriptions and Licensing Manager, Edge Hill University

- Background in systems librarianship
- Worked in Public and HE libraries
- Managing e-resource subscriptions at Edge Hill University since 2019
- Particular interest in statistics and using them for strategic content management

Acronyms and other jargon

- Please download the Glossary!

Poll 1

- What is your role with e-resources?
  - Helping users access resources
  - Buying resources
  - Adding resources to the library system
  - Managing licences
  - Usage statistics
  - Other

  Choose as many as apply

What does an E-Resource Manager do (a non-exhaustive list)?

- Ensures E-resources are available and discoverable

- Provides information to assist purchasing decisions

- Liaises with publishers and other providers to set up and maintain resources and keep up to date with new developments

- Provides statistics and reports to support renewal process

- Ensures licence information is up to date and accessible

- Works with publishers and providers to improve accessibility

- Trouble shoots!

Internal Interactions

External Interactions

Publisher reps

LMS supplier

National and regional library groups

E-Resources Manager

Authentication systems

Serial agents
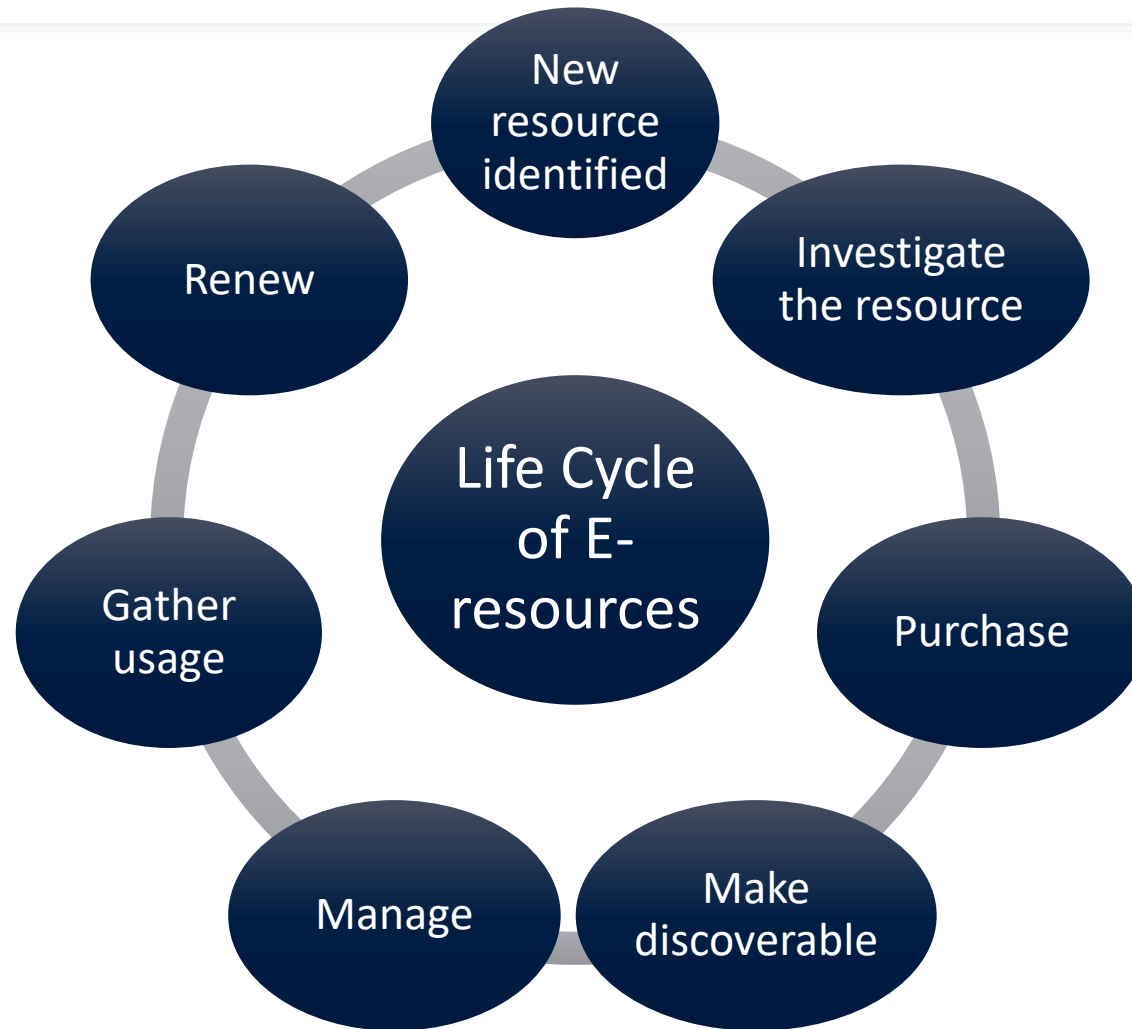
Library Procurement Consortia

JISC

Skills

- Organisation and planning

- Negotiation skills

- Good communication

- Data analysis

- Problem analysis

- Logical and able to understand how different systems interact

Life Cycle of E-resources

New resource identified

Investigate the resource

Renew

Life Cycle of E-resources

Purchase

Gather usage

Manage

Make discoverable

Identifying New Resources

Academic request

New resource request form

Publisher contact

Sales reps emails and visits direct to academics

Account manager suggestions, turnaway data, special offers, new products

General advertising

Word of mouth

Conference demos

Seen at another university

Social media or other general forms of communication

Investigating Resources – Questions to ask

- Where is it available from
  - JISC Licence Subscription Manager
  - Subscription Agent
  - Current supplier
  - New supplier
- What authentication options are there?
- Is there a trial?
- Cost!

New Resource pitfalls

Accessibility compliance

Items only available in packages

Restrictive licences

Non standard payment terms

Non-standard authentication

No usage stats

Long term contracts

Licences

The licence outlines the approved uses and prohibited use of the material. It outlines the responsibilities of the licensee (you) and the licensor (the supplier). It is a legal document and depending on your institution policies and the value of the contract may need to be approved by legal, procurement or senior management.

Authorised users

- Alumni
- Overseas
- Researchers
- Walk in users

External use

- VLEs
- Course Packs
- Inter Library Loans (ILL)

Authentication

- Shibboleth/ Open Athens

- Campus IP addresses

- Proxy services (e.g. EZProxy)

- WAYFless URLS

- Registration with institution email address

- Username and password

Authentication issues

- May need to work with IT to set up authentication methods
- Usernames and passwords can be time consuming to administer
- Increased browser security may change how authentication works – watch this space!

Top Tip!
- Keep your IP addresses and other authentication set up details handy as you will be asked for them often
- I have them on a virtual post it note on my desktop to copy and paste easily

Purchase decisions

- Relevance – usually backed up by Academic submission
- Cost
- Range of resources already available for a subject
- Quality of resource
- Accessibility
- Ease of access
- Previous experience with the publisher/provider

Purchasing practicalities

- New Supplier set up

- Purchase Order (PO) numbers

- Paying invoices

Top Tip!
- Try to find a named contact in your finance dept who can advise and help you through their processes

Poll 2

- What are the biggest challenges you face in managing e-resources?
    - Broken links
    - Managing budget
    - Managing links
    - Setting up Discovery
    - Unused resources
    - Information in too many places
    - Time
    - Other

    Choose as many as apply

Making the resource discoverable

Discovery Layers

- Primo
- Summon
- EDS (Ebsco Discovery Service)
- Enterprise
- Worldcat Discovery

Tools and Browser addons

- Browzine
- Link resolvers
- Browser add ons
  - Libkey
  - Lean Library

Reading List Software

- Talis
- Leganto

Other

- Subject Resource lists
- Communication to academics
- Social media

Top Tip!
Make sure you update all places links have been added if anything changes

Manage the resource

- Check access
- Check links
- Pay the invoice
- Let relevant other teams and departments know the resource is live
- Spot when the renewal is due

Top Tip!
- Keep in regular contact with your academic librarians so you can pass on news and training opportunities.

Keeping track

- Library Management System
- Spreadsheets

Edge Hill Subscriptions **DEMO DATA**

Highlight subscription end dates between:

01/06/2020	
and	
31/10/2020	

(use boxes to set dates)

Key

Awaiting Invoice		Faculty managed
Query		Standing Orders
Check subs dates		Ending
One off archives		

Resource Title	Faculty	Budget Code	Format	Supplier	Publisher / Package Host	SCONUL Res. Type	On a Reqg L	Start	End	PO number	On Prepayment/Annual lis	Base cost 2020/21	Agents Fe	VAT 2020	Total paid 2020/21	Subscrip status	VAT payable	2020/21 Quoted Renewal Cos (inc VAT)
Resource A	GENERAL	LIBSUB	Print	LM		Serial		21/04/2018	20/04/2021	xxxxxx		£ 22.00			£ 22.00	Ending		
Resource B	FAS HISTORY	LIBSUB	Online Only	Cengage/JISC		Full Text Database		01/08/2017	31/07/2021	xxxxxx		£ 111.00	£ 100.00		£ 934.00	Active	n	
Resource C	GENERAL	LIBSUB	Print	LM		Serial		01/02/2017	31/01/2021	xxxxxx		£ 11.00			£ 11.00	Active	n	
Resource D	FH&SC	LIBSUB	Online Only	WK	Ovid	Electronic serials	Yes	01/01/2017	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Awaiting invoice	n	
Resource E	GENERAL	LIBSUB	Online Only	EBSCO		Full Text Database		01/09/2017	31/08/2021	xxxxxx	y	£ 11,111.00		£ 2,222.20	£ 13,333.20	Active	y	
Resource F	GENERAL	LIBSUB	Online Only	JISC		Ebook Collection		30/01/2018	31/01/2021	xxxxxx		$ 111.00			$ 111.00	Active	n	
Resource G	FAS COMP & IT	LIBSUB	Online Only	JISC/ACM	ACM Digital	Full Text Database	Yes	17/02/2020	31/10/2020	xxxxxx		$ 1,111.00			£ 3,625.69	recharge		
Resource H	FAS BUS & MAN	LIBSUB	Online Only	Adage				06/10/2020	05/10/2021	xxxxxx		$ 1,111.00			$ 1,111.00	Active	recharge	$ 1,362.90
Resource I	FH&SC	LIBSUB	Online Only	WK	Ovid	Electronic serials	Yes	01/01/2017	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Active	n	
Resource J	FAS PSYCHOLOGY	LIBSUB	Online Only	JSTOR		Electronic serials	No	01/01/2017	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Active	n	
Resource K	FAS SOC.SCI.	LIBSUB	Print + payable on	LM	Uni of Chicag	Serials in print and	Yes	01/01/2017	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Active	n	
Resource L	FAS BIOLOGY	LIBSUB	Online Only	LM	ASM	Electronic serials		01/01/2019	31/12/2020	xxxxxx	y	£ 1,111.00			£ 1,111.00	Query	n	
Resource M	FH&SC	LIBSUB	Online Only	Primal / Informa		Other database	No	01/09/2020	31/07/2021	xxxxxx	y	£ 1,111.00		£ 222.20	£ 1,333.20	Active	y	
Resource N	FH&SC	LIBSUB	Online Only	Primal / Informa		Other database	No	10/07/2019	31/07/2021	xxxxxx	y	£ 11,111.00		£ 2,222.20	£ 13,333.20	Active	y	
Resource O	FAS BIOLOGY	LIBSUB	Online Only	LM	Annual Revie	Electronic serials		01/01/2019	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Active	n	
Resource P	FAS BIOLOGY	LIBSUB	Online Only	LM	Annual Revie	Electronic serials		01/01/2019	31/12/2020	xxxxxx		£ 111.00			£ 111.00	One off	n	
Resource Q	FAS BIOLOGY	LIBSUB	Online Only	LM	Annual Revie	Electronic serials		01/01/2019	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Active	n	
Resource R		LIBSUB	Online Only	LM	Annual Revie	Electronic serials		01/01/2020	31/12/2020	xxxxxx		£ 111.00			£ 111.00	Active	n	
Resource S	FAS SOC.SCI.	LIBSUB	Online Only	Dawsons	Annual Revie	Ebook	No	01/08/2017	31/07/2017	xxxxxx		SO - so no renewal required			£ -	Cancelled		
Resource T	FAS SOC.SCI.	LIBSUB	Online Only	LM	Annual Revie	Electronic serials	No	01/08/2017	31/07/2021	xxxxxx		£ 111.00			£ 111.00	Active		
Resource U	FH&SC	LIBSUB	Online Only	Proquest		Other database	No	01/10/2017	30/09/2021	xxxxxx		£ 1,111.00			£ 1,111.00	Faculty mana	n	
Resource V	FOE	LIBSUB	Print + payable on	LM	Specialist Pa	Serials in print and	Yes	01/04/2017	31/03/2021	xxxxxx		£ 111.00			£ 111.00	Active		
Resource W	H&SC	LIBSUB	Login access - on	Class		Other database	No	10/01/2020	30/09/2021	xxxxxx		£ 1,111.00		£ 222.20	£ 1,333.20	Active	y	
Resource X	H&SC	OSTA	Login access - on	Class		Other database	No	01/03/2020	30/09/2021	xxxxxx		£ 111.00		£ 22.20	£ 133.20	Active	y	

Trouble shooting issues – Common issues

- Broken catalogue links
- Authentication issues
- Inaccurate coverage dates
- Publisher site issues

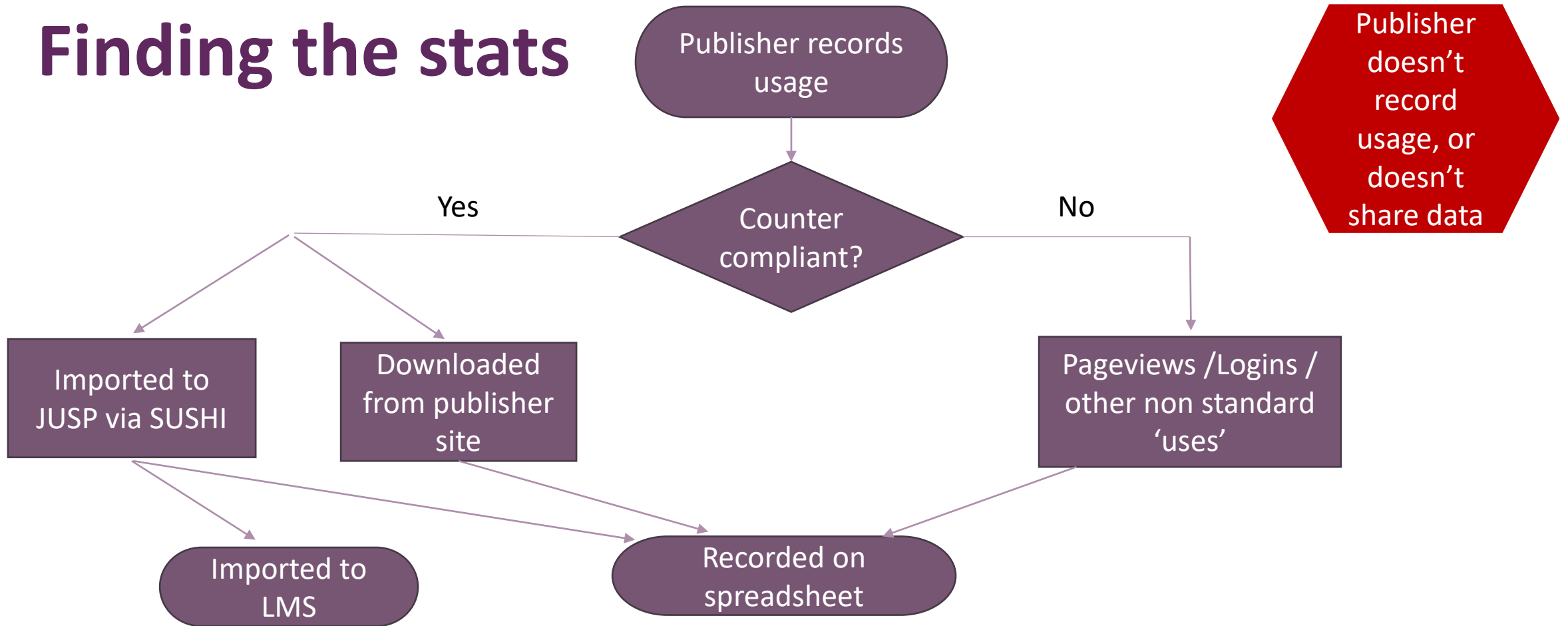# Trouble shooting – Questions to ask

- Can I replicate the issue on and off site
- Should we have access?
- Is it browser specific?
- Does clearing the cache help?
- Does the device need updates?
- Are others having issues (listservs)

Is it being used?

What is good usage?

Some things to consider

- Cost per click

- Number of students on the module/course

- Specificity of the resource

Improving the usage

Sharing the data with library staff and academics

Good use of visualisations (graphs and charts)

Engaging with publishers for training

Accessibility – can you work on any access or accessibility issues with the publisher?

Renew or Cancel?

- Beware of 'auto-renewals'
- Liaise with publishers
- Keep up to date with JISC negotiations.

Top Tip!
- Leave plenty of time for the renewal process as some need 3 or even 6 months notice to cancel.
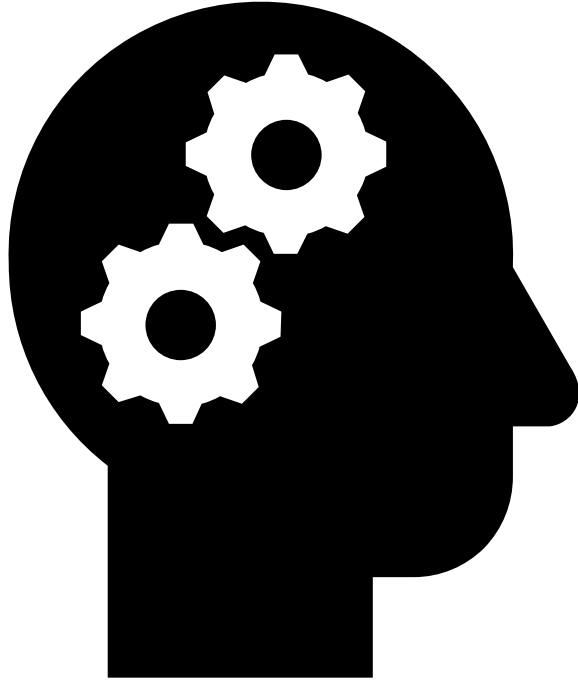
Challenges ahead

- Impact on budgets of inflation, currency fluctuations, reduced funding and student numbers.

- Increasing costs of resources

- Expectations of 'everything online'

- Open Access and the changes that brings to calculating value for money

- Constantly doing 'More with less'

- Accessibility legislation changes

- Digital Security

- AI

Thank you and Questions

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