Electronic Resource Management
Lifecycle and Workflow at UTL

Weijing Yuan
Marlene van Ballegooie
Klara Maidenberg

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& May 30, 2017
Agenda

• Introduction
• Acquisition and licensing
• Access and discovery, holdings management
• 10-minute break
• E-Resource administration and troubleshooting
• Review and Assessment
• Q&A
Acquiring and Managing Print Resources

Acquiring print content and providing access in a library are pretty straightforward...

• Well-established processes
• Well-trained staff
• Familiarity with vendors and their practices
• Mature ILS
• Good understanding of how a print resource can be used
Acquiring and Managing Electronic Resources

But things become more complex with e-resources...

- No physical copies, only licensed access
- Different and more complex workflow and processes
- More work to evaluate the content, acquire the content, provide access, manage holdings and maintain access
- Negotiate rights and sign license agreements for use and preservation rights
- Different staff skills and expertise, and closer collaborations from various departments
- No well-established system that integrates and manages all functions and processes
UTL Materials Expenditures

2014-2015
Expenditures: $30,709,620

- Electronic, 59%
- Print, 41%

2015-2016
Expenditures: $32,252,699

- Electronic, 65%
- Print, 35%
UTL E-Resource Statistics 2015-16

- **E-Journals**
  - Total number of links = 251,918
  - Distinct Titles = 167,162

- **E-Books**
  - Total number of links = 2,139,095
  - Distinct Titles = 1,804,299
  - Packages activated within the Intota ERM = 2,585
  - Number of content providers = 553
Electronic Resource Lifecycle

- Identification and Review of Resources
- Acquisition, Licensing, Renewal
- Providing Access
- Training, Marketing and Branding
- Maintenance, Troubleshooting Administration
- Assessment, Evaluation
Electronic Resource Lifecycle

1. IDENTIFICATION AND REVIEW OF RESOURCES
2. ACQUISITION, LICENSING, RENEWAL
3. PROVIDING ACCESS
4. TRAINING, MARKETING AND BRANDING
5. MAINTENANCE, TROUBLESHOOTING ADMINISTRATION
6. ASSESSMENT, EVALUATION

Electronic Resource Lifecycle
# Licensing Models

<table>
<thead>
<tr>
<th>Perpetual Access</th>
<th>or</th>
<th>Subscription</th>
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<tbody>
<tr>
<td><strong>Examples:</strong></td>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td>▪ Digital collections or historical newspapers e.g. Eighteenth Century Collections Online, New York Times</td>
<td></td>
<td>▪ Aggregator packages e.g. EBSCO Business Source Premier, Knovel ebooks</td>
</tr>
<tr>
<td>▪ Ebooks e.g. Wiley Online Library books</td>
<td></td>
<td>▪ Abstracts &amp; indexes e.g. Scopus, Medline</td>
</tr>
<tr>
<td>▪ Journals e.g. Oxford University Press journals</td>
<td></td>
<td>▪ Programs or tools e.g. Browzine</td>
</tr>
</tbody>
</table>
Content Selection/Packaging and Selection Methods

• By collection
e.g. Oxford Scholarship Online full ebook collection
  Wiley-Blackwell e-journal collection
  EBSCO Business Source Premier package
• A la carte
e.g. ebooks ordered through GOBI
• As part of approval plans
• Patron Driven Acquisition (PDA), Evidence Based Acquisition (EBA), or Demand Driven Acquisition (DDA)
## Access Levels

<table>
<thead>
<tr>
<th>Authorized Users (Who)</th>
<th>Concurrent Users (When)</th>
<th>Locations (Where)</th>
</tr>
</thead>
</table>
| • All UofT current students, faculty and staff, or limiting to a sub-group? | • Unlimited concurrent users, or limited concurrent users e.g. 1 user, 3 users | • On campus  
• Remote access |
| • Walk-in users | | |
| • Alumni | | |
Vendors and Platforms

Vendors: publisher direct vs. through an intermediary

Platforms: interface, functionality, technology, accessibility, etc.

• Publisher platforms:
  e.g. Elsevier Science Direct, SpringerLink
• Aggregator platforms:
  e.g. ebrary, EBSCOhost, ProQuest
• Locally loaded on Scholars Portal:
  many dual hosting examples
What is DRM?

Digital rights management (DRM) is any system used by producers, publishers, and vendors to embed technological controls on what users can do with electronic files – ebooks, movies on DVDs, and other media. Specifically, DRM systems are designed both to enable access and use of digital materials and to restrict copying, sharing, reformatting or otherwise changing electronic media. These restrictions can range from “active” DRM, which marries ebooks to a brand of ereader to more “passive” DRM, like watermarking a digital file with the purchaser’s name and email address.

(source: ALA Digital Content Working Group DRM Tip Sheet, 2012)
Prices

• List prices (by size/tier)
• Discounts
• Hosting fees
• Fees for updates
• Prices often not transparent
• Negotiable
Preservation

• Preservation is one of the key roles libraries play and it will continue in the digital age.

• It is a challenge as libraries license the access to e-resources, without physical books or journals on library shelves.

• It is challenging as it requires large and long term investment in infrastructure, staff resources, and keeping up with technological changes.

• Negotiate local loading rights to have licensed content delivered to us and loaded on UTL’s server or on Scholars Portal for current access and long term preservation.
Metadata

• Who supplies?

• What data are supplied, collection level vs. item level? MARC records? Title lists?

• When are data supplied?

• Do they meet industry standards?

• Does the content provider work well with knowledgebase providers?

• Is there an additional cost?
Usage Reporting

• Does the content provider provide usage data?
• Do reports meet industry standards such as COUNTER?
• How to access?
Consortia Agreements

• Libraries work together to leverage expertise and resources and to increase efficiency and reduce costs

• UTL licenses many resources through consortia agreements, including CRKN, OCUL, CRL, COAHL, HSICT, and others
## Licensing model
- **Perpetual access**

## Content selection/package
- **Complete front list collection (all subjects)**

## Access
- **All current UofT students, faculty and staff; unlimited concurrent users; on campus and remote access**

## Vendor and Platform
- **Direct from Oxford University Press, on OSO platform**

## Pricing
- **Negotiated volume discount**

## Preservation
- **OSO content is also locally loaded on SP**

## Consortia agreement
- **OUP-UofT direct license. Consortia agreements available through OCUL or ARL/LYRASIS**
Electronic Resource Lifecycle

- IDENTIFICATION AND REVIEW OF RESOURCES
- ACQUISITION, LICENSING, RENEWAL
- PROVIDING ACCESS
- TRAINING, MARKETING AND BRANDING
- MAINTENANCE, TROUBLESHOOTING ADMINISTRATION
- ASSESSMENT, EVALUATION
What is a license?

License:
A right that gives a person or entity permission to do something that would be illegal if the person or entity did not have such permission. Usually the scope of the permission excludes ownership rights or privileges. For example, a license to use digital information gives a Licensee permission to access and use the information under the terms and conditions described in the agreement between the Licensor and the Licensee.

(Source: http://liblicense.crl.edu)
What is a license agreement?

**License Agreement:**
A contract that sets forth the terms and conditions under which a Licensor grants a License to a Licensee in exchange for compensation (usually a negotiated fee). The contract is the writing (including any appendices, amendments, or exhibits) that details the terms and conditions of a formal, legally binding agreement between two or more parties.

(Source: http://liblicense.crl.edu)
License Agreements

A license agreement often covers

- content being licensed
- authorized users
- access provision
- permitted and prohibited uses
- Licensor performance obligations
- Licensee performance obligations
- term, renewal and termination
- warranties & indemnification
- business terms
- other legal matters
Licensing and Acquisition

- Finalize pricing
- Review and negotiate a license agreement
- Place an order & create an order record
- Provide vendor with information to set up access
- Invoice and payment processing
- Establish vendor admin account
- Communicate relevant information to Materials Processing
- Local loading
License Term Coding and Display

<table>
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<tr>
<th>License URL*</th>
<th><a href="https://toronto.scholarsportal.info/licenses/Oxford_Journals_Online">https://toronto.scholarsportal.info/licenses/Oxford_Journals_Online</a></th>
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**License Information**

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**Permitted Use**

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<td>Course Pack</td>
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</tr>
<tr>
<td>Local Loading</td>
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</table>
License Term Coding and Display

Digital Rights
Database: Oxford Journals - CRKN
Provider: Oxford University Press
Permitted Uses

Yes  Research or private study
You are permitted to use this online item for research or private study.

Yes  Linking
You may provide a link to this online item on any webpage.

Yes  Blackboard or course web page
You may include material from this resource in course management systems like Blackboard.
You may include material from this online item in Blackboard and course web pages on a secure network, as specified under our license terms.

Yes  Printed course packs
You may include material from this online item in printed course packs, as specified under our license terms.
The licensee may incorporate parts of the licensed materials into print course packs, which are compilations of materials such as articles and book chapters by an academic institution for use by its students in a class for the purposes of instruction.

Yes  Inter-library loan
For further inquiries, contact University of Toronto Library &amp;nbsp;Interlibrary Loan.
Interlibrary loan is a service whereby users from one library may borrow material from another library via fax, surface mail or courier, for the purposes of research or private study, and not for commercial use. Geographic restriction may be specified in the license.
Electronic Resource Lifecycle

1. **Identification and Review of Resources**
2. **Acquisition, Licensing, Renewal**
3. **Providing Access**
4. **Training, Marketing and Branding**
5. **Maintenance, Troubleshooting and Administration**
6. **Assessment, Evaluation**
After the purchase...

• After licensing and acquisition of resource(s) is finalized...

• Notification sent to emetadata@library.utoronto.ca

• Includes relevant bibliographic details to support access provision
  – Title lists
  – Information on availability of MARC records
Electronic Resource Management Systems (ERMs)

• An electronic resource management system is a software module that assists the library in managing all the details related to its electronic content
• Serves as a inventory of titles
• Link management
• Data supply for MARC record feeds
• Electronic Resource Management systems at UTL
  – EIR (local database – our original ERM)
  – Intota (Proquest system)
EIR – UTL’s First ERM

- **MySQL** – relational database containing basic bibliographic details and links to electronic content
EIR Database

- MARC records are parsed by scripts; data entered into system
- Useful for handling URL changes, keep track of MARC records, statistics, etc.
- Serves as a pointer to electronic content
## Sirsi MARC Record

<table>
<thead>
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<th>Ind.</th>
<th>Contents</th>
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<td></td>
<td>n-us-co</td>
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<td>00</td>
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<td>100</td>
<td>1</td>
<td>Hadix, Roger F.</td>
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<td>1 online resource ([127 p.]:briefly ill., ports.</td>
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<td>0</td>
<td>Images of America</td>
</tr>
<tr>
<td>490</td>
<td>1</td>
<td>Images of baseball</td>
</tr>
<tr>
<td>506</td>
<td></td>
<td>Licensed for access by U. of T. users.</td>
</tr>
<tr>
<td>520</td>
<td></td>
<td>From Boulevard Park and Memorial Field to Security Service Field (formerly Sky Sox Stadium), Colorado Springs is a baseball town. Professional baseball arrived in 1901; the Brown Bombers, a semiprofessional black team, came in the 1940s; and the original Sky Sox won the Western League Championship in 1953, 1955, and 1958. Local players such as Ed Kent, Bill Everitt, Jim Landis, Sam Hairston, Connie Johnson, Vinny Castilla, and Todd Helton have made it to the major leagues. Rich &quot;Goose&quot; Gossage, a Colorado Springs native, went directly from Class A ball to the Chicago White Sox, starting his hall-of-fame career in 1972.</td>
</tr>
<tr>
<td>596</td>
<td></td>
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</tr>
<tr>
<td>949</td>
<td></td>
<td>Online resource 1774162[</td>
</tr>
</tbody>
</table>
The Magic of Redirection

- Link in catalogue directs to page that does an "EIR Lookup" and sends user to e-resource
Growing Needs...New Systems

• In late 2010, UTL began subscribing to a new system, Intota (formerly called Serials Solutions), to handle rapidly expanding e-resource collection

• Part of an integrated suite of Proquest tools (Summon, Intota ERM, 360 Link Resolver, 360 MARC record service)

• Backed by Knowledgeworks, knowledgebase of e-resource content
Intota

• Intended to manage the full e-resource management lifecycle
  • Inventory management
  • Manage contacts
  • Cost information
  • Ability to control subscription management issues and licensing details
  • Management reports (i.e. overlap analysis)
  • Alerts for renewals and status changes
  • Assessment tools to aid in collection development decisions
Knowledgebases

- A knowledgebase is a database that contains information about electronic resources.
- The knowledgebase is the center of the e-resource management universe.
- Tracks new additions, title drops, URL changes.
- Ensures user is sent to the appropriate copy that the library subscribes to.
## Intota ERM

### Databases

<table>
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<tr>
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<th>Titles</th>
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</tbody>
</table>
# Taylor & Francis Arts & Humanities Archive 2015 (CFLMM)

[http://www.tandfonline.com](http://www.tandfonline.com)

**Taylor & Francis**

154 titles (0 books, 154 journals)

- Resource Type: Database
- Status: Subscribed
- Discoverability: 360 Link, 360 Core, 360 MARC Updates, Summon

## Titles

154 tracked of 154

- [<< Back to Database Details](#)

## Table

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN/ISBN</th>
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<tr>
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</table>
American Review of Canadian Studies

Alt. Title: The American review of Canadian studies.

Found in: Taylor & Francis Arts & Humanities Archive 2015 by Taylor & Francis

Date(s): 03/01/1971 to 12/31/1996


Holding Details

Database Name: Taylor & Francis Arts & Humanities Archive 2015
Provider Name: Taylor & Francis
Status: Subscribed
Coverage Dates: from 03/01/1971 to 12/31/1996

Title Details

ID: ej0005114; ISSN 0272-2011; eISSN 1943-9954
Publisher: Association for Canadian Studies in the United States
H11CC Subjects: History & Archaeology > Regions & Countries - Americas > Canada Social Sciences > Social Sciences - General
MASH Subjects: None
MARC Records: CONSER Neutral
CONSER Online
NLM Neutral
Question from the Field

When reviewing a catalogue record for an e-resource, how do we know if there is a limitation on the number of concurrent users?
Africa: Beyond Recovery

Alt. Title: Africa


Holding Details

- Database Name: Ebook Library
- Provider Name: Ebook Library
- Status: Subscribed
- Public Holding Note: 1-User
  - On Display the note
- Location Note: null
  - Off Display this note

View Title Details For More Holdings

Discovery

- 360 Core: On
- 360 Link: On
- 360 MARC Updates: On
- Summon: On

Related Actions

- View Renewal Checklist
- Add Payment

Notes (0)

Licenses (0)

Contacts (0)
Search Catalogue

Search for books, journals and more

Anywhere

Advanced Search Browse Search

Search within

Catalogue
Books | Journals | Videos and DVDs | Audio | Classic Catalogue

Articles
Scholarly | Newspapers | Magazines | Article Finder

Databases
Popular | By title | By subject A-Z

Your current search

Anywhere:

Africa: beyond recovery

Format
Books

Refine your search

Online

Subject

Economic Conditions
Politics And Government
United States

9 records returned (9 grouped)

Book

Web: Single User 1. Ebook Library

View Permitted Uses for digital holdings
Question from the Field

Why are there sometimes multiple links to the same vendor site? Why are there sometimes multiple records for the same e-resource?
Sometimes the same content is offered in different packages...

Holdings

- Canadian Business & Current Affairs Database, 01/01/1993 to 04/30/2012
- Taylor & Francis Arts & Humanities Archive 2016, 03/01/1971 to 12/31/1996
- Taylor & Francis FRESH Social Science & Humanities, 03/01/1997 to present
- Taylor & Francis Library SSH - CRKN, 03/01/1997 to present
E-resource management is messy. We are in a constant state of clean up...
Who Catalogues E-Resources?

- E-resource cataloguing is completely outsourced
- We are managers – rather than producers – of online records
- 360 MARC Updates service
- Combines MARC bibliographic data with holdings information (i.e. URLs)
- Bi-weekly updates - new additions, changed records and deleted records
Vendor MARC Records

• Often, vendors will provide MARC records as part of the purchase
• More common with e-book packages than with serials
• Vendor records are preferred over 360 MARC records if quality is significantly better
• Vendor records are loaded in EIR and require more hands-on work for staff (i.e. monitoring for new content, adds/deletes, etc.)
Question from the Field

Q. How long does it take to add e-resource content to the catalogue?

A. Up to two weeks after a resource has been added to or modified within the ERM.
Question from the Field

If a URL for a journal changes, why isn’t the change reflected in the catalogue immediately?

Knowledgebase data supply chain

Publisher supplies metadata to KB

KB vendor takes the data, extracts and transforms it, and loads into KB

Metadata available for libraries to use
Q. After ordering an e-book in Gobi, how does the e-book get into the catalogue?

A. After an e-book is ordered on the Gobi system, YBP processes the order and establishes access on the vendor site (i.e. ebrary, EBL). Once title is activated, an automatic e-mail is sent to the library and title is manually added to Intota. MARC record follows through normal processing stream.
E-Resource Access Challenges

Welcome to Crazy Town!

- Poor publisher data (or none at all!)
- Packages often don’t match purchases
- Time lags
- Some vendors unwilling to work with knowledgebase vendors
- Tracking access rights
Remote Access
EZproxy

- A web proxy server used by libraries to give access to restricted-access website that authenticate users by IP address
- Allows patrons to log in remotely and gain access to bibliographic databases and other content to which the library subscribes
- System is hosted at UTL, managed by ITS
How EZproxy Works

• Base URL for the licensed resource is entered into the EZproxy configuration file (nightly)
• User click on a “proxied” link which points the user’s browser to the proxy server.
• Once user authenticates with individual credentials, they are given access to the resource
Discovery Systems
UTL Discovery Environment

Search Summon

Search Catalogue

Records Only
What sources does Summon index?

https://onesearch.library.utoronto.ca/sites/default/files/Summon_Key_Databases_and_Packages_03192015.xlsx
Organic electrochemistry [electronic resource] / 
edited by Ole Hammerich, University of Copenhagen, 
Copenhagen, Denmark, Bernd Speiser, Universität Tübingen, 
Tübingen, Germany.

imprint Boca Raton : CRC Press, Taylor & Francis Group, [2016]
description xx, 1712 pages : illustrations (some color) ; 26 cm
ISBN 1420084011, 9781420084016 (hbk. : acid-free paper)
format(s) Book

 Holdings

 Number of concurrent users

 3 Users Web ebrary Perpetual Access, PDA and STL

 Permitted Uses

 All sources Details

 Yes Research or private study
 Yes Linking
 Ask Blackboard or course web pages
 Ask Printed course packs

 Database package name

 Permitted uses governed by license
Database package name

Holdings
- Canadian Business & Current Affairs Database, 04/01/1993 to 10/31/2015
- Literature Online (LION), 12/01/1992 to present
- PAC Collection 7, 05/01/1966 to 12/31/2000
- Project MUSE - Premium Collection, 2005 to present

Permitted Uses
- Research or private study: Yes
- Linking: Yes
- Blackboard or course web pages: Yes
- Printed course packs: Yes

Permitted uses governed by license

Imprint: Peterborough, Ont. : Trent University
Format(s): Journal
Developing an Interdepartmental Training Program for E-Resources Troubleshooting
by Sugarman, Tammy S. and Hart, Katherine A.
The Serials Librarian, 2016, Volume 71, Issue 1, pp. 25 - 38

Reports of Conferences, Institutes, and Seminars

Notes on Operations Breaking Ground: Consortial Migration to a Next-Generation ILS and Its Impact on Acquisitions Workflows
by Cheryl Aine Morrison and Morag Stewart.
Library Resources & Technical Services, 2016, Volume 60, Issue 4, p. 259
OpenURL

• OpenURL is a standardized format for encoding a description of a resource within a URL.
• Intended to help users to find a copy of the resource that they are allowed to access.

Link Resolver

- The link is mediated by a link resolver which parses the elements of an OpenURL and queries UTL’s holdings for availability.

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<th>Content Description</th>
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- System sends user directly to resource or provides links to the “appropriate copy” subscribed to by the library.
Question from the Field

How does the Get It! button work? How does it connect resources from the database citation to the article itself?
1. Link directly to fulltext article

2. Link to list of sources that UTL subscribes to (from there users click to fulltext article)

3. When online full-text is not available, the Get It menu will identify other means of accessing the publication or information about it.
Electronic Resource Lifecycle

1. **Identification and Review of Resources**
2. **Acquisition, Licensing, Renewal**
3. **Providing Access**
4. **Training, Marketing and Branding**
5. **Maintenance, Troubleshooting Administration**
6. **Assessment, Evaluation**
Training, Marketing and Branding

• Training
  – Availability of training resources
  – Investigate training needs and arrange sessions

• Marketing
  – Raise awareness of newly acquired resources
    • In the Loop, Reference Services Meetings

• Branding
  – Establishing a UTL look and feel
  – Institutional logo, “Access provided by the University of Toronto Libraries”
Electronic Resource Lifecycle

1. IDENTIFICATION AND REVIEW OF RESOURCES
2. ACQUISITION, LICENSING, RENEWAL
3. PROVIDING ACCESS
4. TRAINING, MARKETING AND BRANDING
5. ASSESSMENT, EVALUATION
6. MAINTENANCE, TROUBLESHOOTING ADMINISTRATION
E-Resource Administration

• Ensure all IP ranges are up to date to enable access to the University of Toronto community

• Generate reports for ancillary discovery services
  – E.g. Browzine

• Support breach investigations and address activities that contravene license obligations
  – E.g. Excessive downloading
E-Resource Maintenance

• Ongoing maintenance required. You can’t just “set it and forget it”.
• Platform migrations
• Serial titles get bought and sold regularly
• DRM changes for e-books
• Requires regular and active management of content
E-Resource Access Problems

- Things are smooth sailing until...
- Errors and inconsistencies in KB data cause our services to break down

- Content providers, KB vendors and libraries are all responsible for e-resource access problems
The Condition, Improvement and Town Planning of the City of Calcutta and Contiguous Areas

by Richards, E. P.

Availability

Not Available for Online Reading

Sorry, this ebook is not available at your library. Please contact your librarian about purchasing this title, or search for another ebook.

Service Unavailable

HTTP Error 503. The service is unavailable.
E-Resource Troubleshooting

EResource Problem for: International Encyclopedia of Human Rights
- E:50429

EResource Problem for: The Changing social geography of Canadian cities
- E:50424
- E:49797

EResource Problem for: Print Measurement Bureau (electronic resources)
- E:49793

EResource Problem for: Fundamentals of error-correcting codes
- E:49792

EResource Problem for: Eurosla yearbook (electronic resource)
- E:49791

EResource Problem for: Searching WorldCat reference card
- E:49742

EResource Problem for: Elements of an effective innovation
- E:49657

880 Link report: Spinal surgery and alleged medical negligence
- E:49650

E-resource problem: Clinical Studies in Medical Biochemistry
- E:49641

Details
- Type: standard helpdesk call
- Status: OPEN
- Priority: Standard Issue (5 days)
- Resolution: Unresolved
- Component(s): cdd - catalogue record
- Labels: broken_link

Description
- Catalog: 33116570

Record:
The Changing social geography of Canadian cities, edited by Larry S. Beurme and David F. Ley.
http://go.ubuo.ca/area33116570

E-Resource URL:
http://link.library.utoronto.ca/.../Resources__ID=8052922&T=F

Problem Description:
The first resource isn’t available.
Electronic Resource Lifecycle

- Identification and Review of Resources
- Acquisition, Licensing, Renewal
- Providing Access
- Training, Marketing and Branding
- Maintenance, Troubleshooting, Administration
- Assessment, Evaluation

Electronic Resource Lifecycle
What is E-Resource Assessment?

The practice of measuring and determining the performance, quality or value of a product or resource.

The value of an e-resource is not absolute and cannot be measured directly.
When do we assess?

E-resources are typically assessed at two junctures:

• When being considered for acquisition
• When being considered for renewal or cancellation
Who is involved?

Assessment is a team sport!
As e-resources claim a growing share of the library’s acquisitions budget, they will require an increasing share of our attention.
How is it done?

ASSESSMENT

Gather the evidence

Inform & document

Examine the options

Assess & decide
Step 1: Gather the Evidence
Gather the Evidence

- Title list(s)
- Information about the terms of the deal, including:
  - pricing
  - renewal date
  - individual vs. package deal
  - perpetual rights provisions
  - access platforms and their design
  - acquisition history
  - OA status of content
- Investigate existence of a print copy
- Gather indicators of value
Indicators of Value

There is no yardstick for measuring the value of an eResource. Instead, we use various metrics as proxies for value.
Usage Statistics
The COUNTER Standard

- Reports show what is being accessed and how much.
- Vendor compliance is voluntary and based on a code of honour.
- More recently, the SUSHI protocol has created a mechanism for automated harvesting of COUNTER reports.

https://www.projectcounter.org/code-of-practice-sections/usage-reports/
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READING A COUNTER REPORT
READING A COUNTER REPORT

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**UNIVERSITY OF TORONTO - 1121**

**Period covered by Report:**
2014-01-01 to 2014-12-31

**Date run:**
2015-01-20

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## Reading a Counter Report

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2014-01-01 to 2014-12-31

**Date run:**
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*NOTE: The table above shows the number of successful full-text article requests by month and journal for the period from January 1, 2014, to December 31, 2014. The data is presented for various journals, with detailed information on the number of requests for each journal.*
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Handbook of Ethics, Values, and Technological Design

Sources, Theory, Values and Application Domains

Editors: Jeroen van den Hoven, Pieter E. Vermaas, Ibo van de Poel
ISBN: 978-94-007-6969-4 (Print) 978-94-007-6970-0 (Online)
Case Study: Usage Statistics for Springer eBooks

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Vendor Website Design Affects Use

“Perhaps publishers design their sites for maximum convenience to the user, but the more cynical might suggest that publishers deliberately design their sites to inflate their usage statistics”

All indicators of value are flawed...

“To use usage statistics as an absolute criterion for judging value is dangerous and misunderstands the scholarly system”


• Reliance on a single indicator can lead to skewed or inaccurate assessment
• The use of several indicators will better illuminate the value of a product
Cost-Per-Use
Cost / Use = Cost-Per-Use

- A metric that allows for uniform comparisons
- Allows benchmarking within disciplines, between disciplines, and with other institutions.

**USE WITH CAUTION!**

- No unit cost is available in a package deal
- Multiple access points make the calculations of cost and use very complex
- Does not take into account the amount of content published by different journals
- Biased towards larger audiences, STEM disciplines, older journals and multidisciplinary content
- Affected by currency exchange fluctuations
Case Study: Comparing Two Journals

<table>
<thead>
<tr>
<th>Journal A</th>
<th>Journal B</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100 per annum</td>
<td>$100 per annum</td>
</tr>
<tr>
<td>10 years of content</td>
<td>1 year of content</td>
</tr>
<tr>
<td>80 articles downloaded in 2015</td>
<td>20 articles downloaded in 2015</td>
</tr>
<tr>
<td>$100 / 80 downloads = CPU $1.25</td>
<td>$100 / 20 downloads = CPU $5</td>
</tr>
</tbody>
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Which of these two journals is more valuable?
Case Study: Comparing Two Journals

**Journal A**
- $100 per annum
- 10 years of content
- 80 articles downloaded in 2015
- $100 / 80 downloads = CPU $1.25

Assuming 50 articles published each year, there are now 500 articles available from this journal.
80/500 = **16%** of all the articles were accessed in 2015.

**Journal B**
- $100 per annum
- 1 year of content
- 20 articles downloaded in 2015
- $100 / 20 downloads = CPU $5

Assuming 50 articles per year, there are 50 now articles available from this journal.
20/50 = **40%** of all the articles were accessed in 2015.
Case Study: Comparing Two Journals

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Assuming 50 articles per year, there are 50 now articles available from this journal.  
20/50 = 40% of all the articles were accessed in 2015.

**Which of these two journals is more valuable?**
Degree of Uniqueness
The Problem of Duplication

The same title may be aggregated by several vendors and available to us from multiple sources.
Overlap Analysis

<table>
<thead>
<tr>
<th>Database</th>
<th>Total ISSNs</th>
<th>Common ISSN count</th>
<th>Unique ISSN count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web of Science</td>
<td>15892</td>
<td>13074</td>
<td>2818</td>
</tr>
<tr>
<td>SCOPUS</td>
<td>27143</td>
<td>13074</td>
<td>14069</td>
</tr>
</tbody>
</table>

- Web of Science
- Scopus
Limitations of Overlap Analysis

• Overlap is calculated based on ISSN matching. Changes, omissions, typos and discrepancies in ISSNs reduce accuracy.

• INTOTA can only calculate overlap for full-text journal packages. Overlap in abstracting databases and aggregated eBook must be done ‘by hand’.

• Overlap does not usually detect varying coverage periods.

• Overlap is a “point-in-time” indicator. Packages are dynamic and titles can move in and out.
Assessment of bundled content is challenging...
Assessment of bundled content is challenging...

- Bundled content is sold as one package, but the usefulness and value of individual titles will vary.
- Multiple access-points complicate the data gathering process.
- Holdings, title lists and metadata not always accurate or normalized.
- Current metrics are limited. They capture views or downloads but not true engagement.
- Data normalization and analysis are resource intensive.
- Formats and platforms are evolving more quickly than measurement standards.
Step 2: Examine the Options
Examine the Options

• If it’s a package, can we cherry pick? Or is it all or nothing?
• What is the break-even point when the price of individual titles exceeds the package price?
• What are the alternatives (another vendor, aggregator, print sub.)?
• What is the impact of each outcome on workflows and staff resources?
Step 3: Assess
Quantitative Evidence

- Review usage over 3 years (within context and with a critical eye) for:
  - Breadth and depth of use
  - Standout titles or periods
  - Growth over time
  - Size of the interested population

- Measure degree of uniqueness (overlap analysis)
- Calculate cost-per-use
- Look into use by faculty (citations in articles or in syllabi)
But remember...

Stuff that counts

Stuff that can be counted
Qualitative Inputs

Expert gut-check – does the quantitative data make sense?

• What do colleagues (within and outside UTL) think of the resource?
• Has another library cancelled?
• Have there been complaints or technical issues?
• Are there any special features or search tools within the product?
• How good is the user experience and the platform’s usability, accessibility and reliability?
Case Study: Elsevier ScienceDirect Package

• Our most expensive package.
• Usage for 2014-2015 = 2,511,226 article downloads (COUNTER JR1)
• Usage for 2015-2016= 3,554,747 article downloads (COUNTER JR1)

+ 41.55% year over year.

Big Deal success story?
Case Study: Elsevier ScienceDirect Package

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- Usage for 2014-2015 = 2,511,226 article downloads (COUNTER JR1)
- Usage for 2015-2016 = 3,554,747 article downloads (COUNTER JR1)

+ 41.55% year over year.

Big Deal success story? NOT SO FAST!
Step 4: Decide
Decide

**Keep** the current deal because it is delivering good value or because there are no compelling alternatives

OR

**Modify** the terms of the deal

OR

**Cancel**
If cancelling, consider arranging alternative access to all/some of the content.
Step 5: Inform and Document
Inform and Document

- Document findings and recommendations in writing.
- Communicate with the licensing office, metadata and discovery team and administration.
- Inform users and colleagues.
Electronic Resource Lifecycle

1. IDENTIFICATION AND REVIEW OF RESOURCES
2. ACQUISITION, LICENSING, RENEWAL
3. PROVIDING ACCESS
4. TRAINING, MARKETING AND BRANDING
5. MAINTENANCE, TROUBLESHOOTING ADMINISTRATION
6. ASSESSMENT, EVALUATION
E-resource management is like...

tending to a large garden.
Together, we can achieve this:
Questions / Comments / Suggestions

Weijing Yuan
Marlene van Ballegooie
Klara Maidenberg