Innovative Practices in Electronic Resources and Acquisition Management

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INNOVATIVE PRACTICES IN ELECTRONIC RESOURCES AND ACQUISITION MANAGEMENT

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Participants of this pre-session were given the opportunity to learn about some of the innovative practices of electronic resource professionals and their colleagues from around the country. Five electronic resource professionals on the front lines of budget cuts, staffing and workflow challenges, work-load increases, departmental merges, and the rising cost of services and content shared their experiences and home-grown best practices. Attendees had the opportunity to contribute during the session and to take home and implement the ideas that best suited their institutions.

INTRODUCTION

Ryan Weir is the Director of Technical Services and Electronic Resources for Murray State University, University Libraries. Murray State University is a mid-sized regional university located in western Kentucky.

Electronic Resources as a profession has been around long enough that you could argue it is no longer an emerging field in library science. However, due to the nature of continual change of technology, interfaces and innovative resources that electronic resource professionals deal with on a yearly, monthly and sometimes even sometimes daily basis, it is still necessary for electronic resource professionals to stay at the top of their game and continue to innovate in order to keep up with the ever changing landscape of electronic resources. This article details a pre-session presented at the 2010 Charleston Conference dealing with some of the innovative practices of five electronic resource professionals from a diverse set of universities across the country and seeks to offer both theoretical and practical insights into the profession, and hopefully time and money saving solutions for our readers.

WORKFLOW 2.0: APPLYING SOCIAL SOFTWARE TO TECHNICAL SERVICES

Since 2008 Denise Pan supports student, faculty, and staff success in the role of Associate Director of Technical Services in the Auraria Library. Pan originally concentrated on improving the access and discovery of online learning materials as the Electronic Resources & Serials Librarian. Since promotion to the Associate Director of Technical Services, Pan facilitates the workflow processes between acquisitions, cataloging, and electronic resources. Her research has focused on enhancing infrastructure and improving workflow processes through technology and organizational management theories.

This portion of the article is a case study on the experiences reorganizing the University of Colorado Denver Auraria Library, Technical Services department and adapting social

networking software to improve workflow. Located in downtown Denver, Colorado, Auraria Library is a unique tri-institutional academic library. It is administered by the University of Colorado Denver, and also serves Metropolitan State College of Denver and the Community College of Denver. As a result, the library is responsible for supporting curriculum ranging from vocational training to doctoral programs. For the academic year 2008-2009, the full time enrollment for undergraduates was 28,000 and graduates included 2,000.

Denise describes how blogs help with communication and wikis to facilitate collaboration. Presentation participants will learn how Auraria Library turns a bad economy into a good motivator for change, reorganizes staff, communicates within & between departments, builds efficiency and workflow tools, and does more with less. Auraria Library Technical Services has restructured to become better communicators, collaborators, and more efficient. There have been several important catalysts for change. Like most colleges and universities across the nation, enrollment has been growing, staffing is declining, and funding is flat. In addition, Technical Services department are challenged with new formats, changing processes, and evolving technology.

These changes can be quantified in terms of staffing and budgets. From June 2008 to June 2010, Auraria Library has lost nearly a quarter of employees overall (from 71 to 54 FTE) and the Technical Services Division has lost about a third (from 21 to 14 FTE). Although Auraria Library budgets have been slightly lower, library buying power declines every year because of annual publisher increases. According to the *Library Journal* 2010 Periodical Price Survey, "average overall price increases for periodical subscriptions dropped from 7.6 percent in 2009 to 4.4 percent in 2010" (37).

In response to these changes, Auraria Library Technical Services was transformed by reorganizing teams, cultivating new workplace culture, retraining staff, and leveraging technology. The staff restructuring process was facilitated by the recommendations of R2 Consulting. In the fall of 2008, the library was developing a 3-year strategic plan. To help with the planning process, the Library Director hired R2 Consulting to analyze the workflow and organizational structure of Auraria Library. They observed that, "Acquisitions and E-Resources and Serials units [were] organizationally separate[d] from Cataloging & Metadata Services." They recommended that if these departments were combined under unified management, the processes "associated with ordering, receiving, invoice processing, MARC cataloging, and other access management could be coordinated into a single workflow…enable[ing] more extensive cross-training and redirecting staff to where the work is, with less concern about departmental lines" (61).

The reorganization process began by reframing conversations in a new context. Instead, of presenting roles and responsibilities in terms of hierarchical organizational charts, the emphasis was on workflow and the life cycle of learning resources during appreciative inquiries. Appreciative Inquiry is an organizational management strategy that encourages individuals to become active participants in change by contributing their ideas. During individual Appreciative Interviews, conversations included the 4–D Cycle: Discovery: appreciating what is; Dream: imagine what might be; Design: determine what should be; Destiny: create what will be (Sullivan, 223-225). As a result of these conversations, the Technical Services division was reorganized into 4 teams – Acquisitions, eResources, Cataloging and Systems.

In addition to changing the organizational structure, a team-based environment was facilitated by practicing collaborative Evidence Based Information Practices. This organizational management practice shifts decision making from top down by employers to bottom up by

employees (Pan and Howard, 92). In particular, Auraria Library's eResource team has been practicing centralized administration and distributed decision making. Each team member leads their area of specialization, but the entire implementation process is managed centrally and collaboratively (Pan and Lugg, 28).

Only two individuals from the original Electronic Resources team persisted through the reorganization. Some retired, others transferred to Public Services, and several reassigned into Technical Services with no prior experience. The new members needed to learn quickly on the job. Formal and informal learning is encouraged and supported. Budget permitting, staff participate in local conference and online webinars. They are also encouraged to learn from each other. In an accommodating environment, everyone is expected to be helpful, but also patient and forgiving when mistakes occur or efforts fall short. Routine and ad hoc meetings are valued when meaningful conversations include all participants and different perspectives are heard and considered. To facilitate this dialogue, agendas and supplementary information are made available in advance, and minutes are promptly accessible after the meeting.

Enterprise 2.0 technologies are crucial for implementing a learning organization. Andrew McAffe was the first to coin the term "Enterprise 2.0". His book provides case studies and examples that illustrate how private companies are deploying social networking software as "the new tools of collaboration and interaction; changing established norms, practices, and processes; and reaping rewards" (15). He explains that, "People collaborate in order to get work done and solve problems, and these days there's no shortage of problems to solve" (16). Moreover, "With enough brains, many, if not most, business challenges can be met, and Enterprise 2.0 is all about using technology to bring brains together effectively" (16). The lessons learned in business apply to libraries. This presentation is an example on how social networking software has facilitated collaboration efforts at the Auraria Library Technical Services division.

Niall Cook's book categorizes social software tools into 4 actions or activities: communication, cooperation, collaboration, and connection. This presentation focuses on communication blogs and collaboration wikis. Cook defines "communication platforms as those that allow people to converse with others, either by text, image, voice or video, or a combination of these" and "collaboration tools encourage people to collaborate with each other on particular problems, directly and indirectly in both central and distributed ways" (37). Therefore, blogs are informal and less structured. They rely on pre-defined categories to channel discussion in specific areas (47). Versus wikis are formal and more structured. Collaborative social software "supports the engagement of participants in a coordinated effort to solve a problem, with shared commitment and goals" (63).

Cook has identified 3 roles that internal blogs can support. First, blogs enable knowledge management by openly recording individual's ideas and opinions and sharing with others who could contribute to or use of those ideas. Business intelligence can be facilitated by aggregating information in order to recognize patterns. Project management is possible by capturing unstructured and informal information and communication relating to a more structured or formal project (47). Similarly we have used blogs as a centralized management tool to track troubleshooting e-resources issues and to manage the acquisitions-to-assessment of new e-resources workflow.

Auraria Library develops blogs using free software from Blogger. This hosted solution is user-friendly and includes several built-in features that facilitate knowledge management. Most importantly, the blog can be setup to notify authors automatically with emails about new blog

posts and comments. The advantage is that these emails can be deleted since the keyword search and browse by author defined labels enables information to be retrieved when needed. Access to the blog can be limited to a small private group, or publically accessible by anyone.

To track e-resource access and discovery issues, a troubleshooting team needed and created a centralized management tool that prevented problems from being forgotten and left unresolved. Once reported and identified as a priority, issues were assigned to a troubleshooter. The blog helped document problem solving efforts and identify the most effective steps to resolution.

The team also uses blogs to help manage the workflow of new resources. Once collection development decides to accept an electronic resource proposal, the acquisitions team begins the ordering process. Licensing, invoicing, registration, and record creation require coordination and communication. To facilitate this process, they use a private workflow blog and post template that identifies required information and assigned responsibilities. Team members are notified by email when a new e-resource post is created, and comments are sent after each task is completed. This workflow blog was introduced to the team about a year ago. Although they were open to using the blog, initially it was not part of their daily routine and thus the sometimes forget to consult it on a regular basis. The other disadvantage is that the blog does not allow users to upload files. Instead, in the blog post, staff will email each other files or refer to documents on a shared network drive.

Wikis are simply collaboratively created websites. They are easy to use and create because they are developed within a web browser and use a simplified markup language called wikitext. Since the software was developed for multiple authors, it works best when participants have a reason to collaborate. Some might be uncomfortable with loss of control because others can edit their page. However, the history feature provides some assurances since it compares versions and can reverse incorrect contributions.

In April 2009, Auraria Library began to redevelop their intranet with Mediawiki's software. The collaborative author features gave all library employees permissions to contribute to the intranet. By doing so, the wiki has become widely used and the home page has over 14,000 views. The wiki intranet is essential for creating collaborative evidence based information practices. Reoccurring monthly meetings are scheduled in Outlook calendars, meeting agendas are posted on the wiki in advance, participants are invited to contribute additional topics, and supplemental information are linked and available to review before the meeting. Within a few days after the meeting, minutes and decision outcomes are also posted. In addition, ad-hoc planning meetings are scheduled to discuss project details that cannot be covered in monthly status meetings. The wiki intranet is the centralized knowledge management tool for process, procedures and data collection. This routine is applicable to all types of situations and groups.

For example, to facilitate the workflow of electronic resource we use a wiki project board. This wiki page helps me manage the workload of 6 team members. During monthly meetings we review projects and the status of new or cancelled e-resources. Since the wiki is open to all library staff, everyone is able to add or update their progress. This is also an opportunity to model dialogue and collaborative decision making by leading planning discussions and document decision outcomes on the wiki project board. In addition, the page links to the workflow blog post for each new electronic resource.

In this portion of the article, two different technologies, blogs and wikis, were adopted for four different purposes. In the first case, troubleshooters themselves created a blog to help them with knowledge management and business intelligence. In the remaining examples, the wiki

pages were implemented after the department had been reorganized into teams and began encouraging collaborative evidence based information practices. Initially the workflow blog was not successful until it had been reinforced with the wiki project board and routine meetings. By creating more formality and interaction, Enterprise 2.0 software helps us organize and share knowledge, recognize patterns, and manage projects more effectively.

However, the work is not complete and efforts to improve processes and procedures continue. An in-house cooperative social software "Workflow 2.0" tool is being developed. It includes the positive communication and collaboration function that are present in blogs and wikis, and overcomes the negatives by enabling staff to save files and send emails. This summer Auraria Library hired a temporary programmer to help rebuild the website using Drupal, an open-source content management system. In the last couple of months of his contract, the programmer built a workflow tool in Drupal and implementation is in progress. Since the social infrastructure is in place, tasks and responsibilities have been established. Only the right technology and expertise is needed to streamline the e-resources workflow and transition from communication and collaboration into cooperation.

SOLUTIONS TO TRACKING RESOURCES AND USAGE STATS WITHOUT AN ERM

Regina Koury is the Electronic Resources and Reference Librarian at Idaho State University, Eli Oboler library. She had previously worked at the University of Southern California with experience in electronic resources, acquisitions, interlibrary loan and public desk services. Regina received an MS in Library and Information Science from University of Pittsburgh, and is currently taking graduate coursework in Instructional Technology at the Idaho State University.

This portion of the article discusses zero cost alternatives to purchasing an ERM system for your institution and includes practical ideas for helping manage the information and workflow of an electronic resources department. Idaho State University (ISU) is a Carnegie-classified doctoral research University located in Pocatello, Idaho, with approximately 15,000 students as of spring 2010. ISU offers more than 280 programs in allied health professions, natural and physical sciences, humanities, performing and visual arts, education, engineering, business, and technology. In October 2009, Idaho State University migrated to a suite of new Google applications (Figure 1): email, sites, docs, chat and calendar. Our university IT team actively promoted its use for students, faculty and staff, by setting up training presentations and chat sessions. Most of our library staff had been using Gmail and Google Docs for personal accounts already, so migrating to it as a work related application wasn't a problem. Not only it wasn't a problem, it actually opened doors for more work collaboration.

Figure 1. Google apps at ISU

Why use Google Docs? Mainly, it's an idea of ubiquitous access: an ability to work with library related documents away from your office desk.   Most all of our library work related files are stored on a shared drive, which can be accessed from library computers only. Think about Google Docs as your plan "B", when your laptop or flash drive are forgotten at work and you need to access one of the documents ASAP or as alternative for those of us who do not have MS Office installed on home computer. Google Docs have a great help section to get you started and troubleshoot some of the common issues. This presentation will talk about our experiences, what worked and what did not. What you decide to share is up to you. At ISU Library some of the documents we share are usage stats for electronic resources, free trial listings, policies and procedures (e.g.: steps for e-book cataloging, steps for MARC records importing from OCLC, e-journal post cancellation rights, etc), instruction workshops calendar, library faculty policies and procedures.

Chances are, if you are a librarian in charge of collecting and maintaining e-resources usage statistics at your library you will be asked to provide those numbers at any time of the day or night, when you are in your office or away at the conference, whether it is a for a "journal/databases budget cut" project or for renewing a particular resource. Importing usage stats into Google Docs allows library staff to look at the numbers at any time. If you decide to share usage statistics, create a folder first. For instance, you may want to use a separate folder for database's usage, for e-book's usage and e-journal's usage (Figure 2). This way, you can share entire folders, which simplifies viewing hundreds of usage reports from various vendors. In turn, library liaison's can just click on the "Shared with me" view, choose what they need and share that with their department liaison.
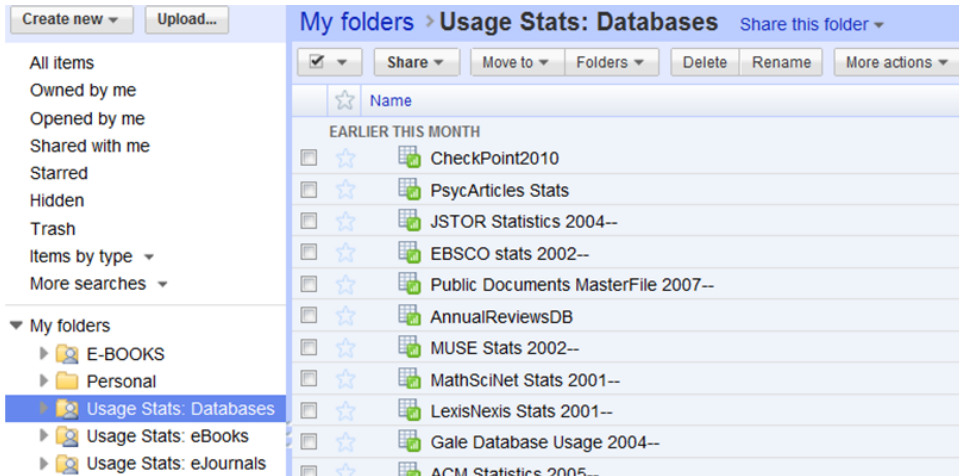
Figure 2. Google Docs Folders

In Google Docs it is easy to create a list of people you share documents with: start typing letters of the first name and the email of that person will automatically show up on the screen. A challenge for us in sharing a document were privacy settings and remembering to set them up to either "public on the web", "people at ISU with a link" or "everyone at ISU". Also, there is no "print preview" in Google docs. To work around it, go to "print" tab, which will then transform the file you want into the pdf file and only then you can view the print job.

At ISU library Google Docs in document sharing is like an EzProxy for electronic resources: access anytime from anywhere. Your mileage may vary, however: depending on the organizational culture and staff's desire to learn, you may not find Google Docs that useful at all. Some may prefer Google Sites better. We found that there are pros and cons in using Google Docs:

The pros are:

- One access point and same log in for email, chat, docs, calendar, and sites. No need to remember various log ins for shared drive or online chat service (Figure 3).
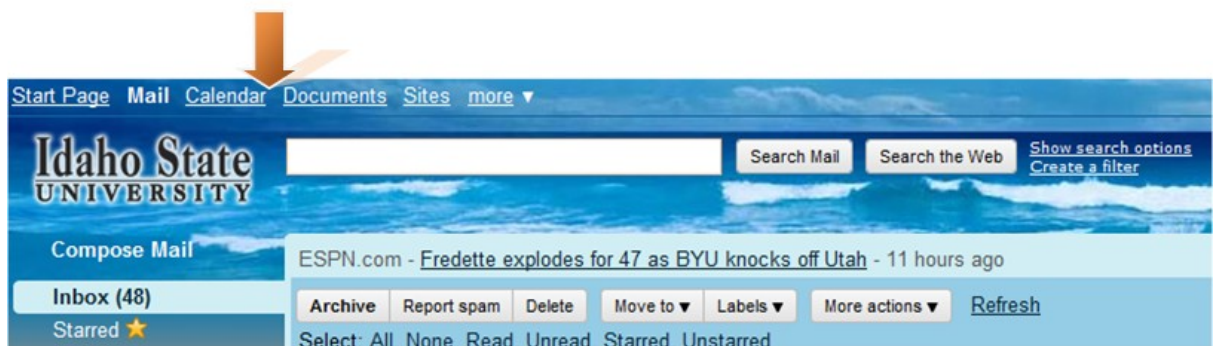

Figure 3. One log in point for Google apps

- Access from anywhere. Whether you are at the conference or at home, Google docs can be opened from any computer.

- Automatically saves documents. This is probably one of the best features of Google Docs. Once you stop

Typing the document is automatically saved and there is no threat of losing valuable information.

- Download options. Pretty much every MS Office document can be downloaded in Google Docs and vice versa.

- Track changes option. If you are collaborating on a project, Google Docs automatically tracks every change made to the document.

The cons are:

- Time to learn formatting, especially MS Excel functions in the Google spreadsheets.

- Some of the formatting might get lost when downloading.

- Remembering to set up sharing settings. Very important to remember when setting up settings and allowing group of people to either edit or just view a document. Any document can be made public, again remembering to do it, is important.

While Google Docs are a good way to share documents and access them from anywhere, library blog is a good way to share announcements from vendors and publishers, scheduled downtime and troubleshooting issues. Blog format allows for better visibility and archiving. Our library uses Word Press software to keep a "Library Relief" blog. We also have a library email list for those who work on the reference desk, so once you send an email to that list, our reference department student assistant puts it in the blog.

The pros of having a blog are:
- Archive of Institutional knowledge (entries go back to 2001)

- Browse by categories/tags

Both of these strategies: Google Docs and blog are zero cost methods to help organize and disseminate the immense amounts of information acquired and created by an electronic resources department.

FLAT LINE BUDGET STRATEGIES

A native Englishman, Geoff Timms joined Mercer University's Jack Tarver Library faculty for his first professional library position in 2007. He serves as Electronic Resources/Web/Systems Support Librarian while supporting the Biology, Chemistry, and Physics faculties as their Subject Librarian. Formerly a missionary to the Republic of Albania engaged in rural development, Geoff enjoys his diverse public service and technical services/systems responsibilities. This section of the article describes the initiatives taken during a flat-line budget year to cut serial resources while maintaining a positive relationship with teaching faculty. In addition, some reflection is provided on non-traditional access models in which Tarver Library participated during this experience.

In terms of serial management, a flat line budget is essentially a budget cut. This is because serials typically exhibit inflation much higher than that of retail inflation. Whether this is demand or supply driven, or a result of other influences, the net result is the same: Libraries must often cut current serial subscriptions. In the current economic climate, some serial vendors have

either eliminated or curbed price increases in recognition of this fact. Ultimately, however, when it comes to balancing the flat line budget, the axe must be sharpened.

It could be considered fortuitous that the context of a budget cut can cause us to engage in activities which we should be, but are perhaps not, doing all along. In many libraries, serial acquisitions reflect, to some extent, the interests and emphases of the teaching faculty. As faculty come and go and as curricula change, these interests and emphases change. Thus, the serial collection may decrease a little in relevance over time if attention is not paid to its ongoing utility on a regular basis. Being forced by a budget cut to assess a serial collection, then, can help us to weed out items which should, perhaps, have been discontinued a while ago and eliminate other inefficiencies which have been overlooked. Such was the case in the most recent fiscal year at Mercer University's Jack Tarver Library. The result was a review of print serial subscriptions and a reclassification of some individual resources' budget categories.

With a University-wide FTE of around 7315 and a Macon traditional campus FTE of 2398, the Jack Tarver Library, primarily serving the Macon traditional campus, has modest serial and e-resource budgets. When faced with a flat-line budget, it became necessary to implement a serial review. Individual serial subscriptions at Tarver Library are still typically in print with online access added where possible, although when new titles are added they are now licensed for online access only. In the spring of 2009 the Associate Director for Public Services and Collections (ADPSC) implemented a print journal review.

In order to complete the print journal review successfully, lessons learned from the past dictated that diplomacy would be of paramount importance. The library's Subject Librarians played, therefore, a key role in representing the process diplomatically to their respective teaching faculties. Initial communiqués to subject-specific teaching faculties were prepared by the ADPSC and shared with Subject Librarians along with at least one in-depth group meeting to discuss and refine the strategy. Lists of print serial titles by discipline were provided along with usage data and currently available alternative (online) access points, including dates covered and embargo information. Armed with this information, Subject Librarians arranged meetings with their teaching faculty counterparts to review current print serials.

Part of the diplomatic process, with no promises made at all, was to learn about additional serial needs from the teaching faculties. This was essential to demonstrate the balance that the library strives to maintain in meeting information needs, keeping the collection relevant, and abiding by ever-tightening budgets. Following several meetings and numerous phone calls, emails, and clarifications with their teaching faculties, Subject Librarians returned spreadsheets of titles to the ADPSC, identifying which titles were considered essential, which titles could be dropped while maintaining embargoed content in a full text database, and which titles were not deemed necessary at all. Much of the elimination of titles was achieved by demonstrating that substantial online access was available in databases (albeit often embargoed). This was not the case with science faculty, where access to current research is perhaps the most essential and embargoes were not deemed acceptable. Additionally, lists of desired subscriptions were obtained, including the "we can drop this and this if we license this" type of evaluations. Print titles which were duplicated totally electronically were dropped by default.

The ADPSC prepared summaries of proposed cancellations, retentions, and desired additions for Subject Librarians to return to their teaching faculties. This served as a safety net to ensure that all had been communicated accurately, and to demonstrate the balanced intentions of the library. It was gratifying to experience, on the whole, positive cooperation from teaching faculty,

a sense of collaboration in the face of adversity, and even improved Subject Librarian-teaching faculty relationships as a result of this process.

As the calendar year ended and cancellations were made, the ADPSC returned concise, but data-rich, summaries of the process-to-date for Subject Librarians to share with their teaching faculties. These outlined the overall results showing how many duplicated titles were eliminated and at what cost saving, as well as how many titles had been recommended for cancellation by teaching faculty and at what cost saving. Data was also provided to demonstrate how at least 50% of saved money had to be reinvested simply to maintain current subscriptions with their annual price increases. In addition, the remainder of the savings (and then some funds injected from elsewhere) was demonstrated to be deployed to cover the ongoing costs of a very popular, and initially a gift, subscription to a suite of e-journals. Subsequent opportunities described under the Alternate Access Models section of this article enabled the university libraries to work together to provide additional requested serial titles.

Lastly, summaries were provided about journals in each specific subject discipline demonstrating the value of what was canceled, the access already existing to requested new titles (there were several titles to which faculty unknowingly already had ongoing, sometimes embargoed, access, particularly as a result of some of the activities described in the Alternative Access Models section of this article), and the items which were added to the 'wish list'.

Another achievement during the budget challenge was to reclassify some individual resources within the budget, thus enabling a redistribution of funds among budget lines. Thanks to the library's recent first endowment, the library book budget is reasonably healthy. With the initiative of the Electronic Resources Librarian, several electronic resources which were alternatives to former print monographs (e.g. Oxford English Dictionary Online, Grove Music Online, Oxford African American Studies Center, and ebrary) were reclassified as books instead of e-resources. This enabled a budget category adjustment, releasing funds to help meet the cost of online serials.

While these actions helped Tarver Library significantly in the fiscal year in which they were undertaken, they were one-time savings or at least, in part, savings which can only be realized every few years. Tarver Library faces another flat line budget with continuing, albeit slightly less, inflation of e-resource prices and, once again, the axe must be sharpened and a new review must be undertaken. As a point of interest, Timms is currently working on the development of an online utility to assist with the decision-making process for making serial cuts. This joint project was presented during an Innovation Session at the 2010 Charleston Conference, entitled "OARS: Toward Automating the Ongoing Subscription Review," and a separate article was submitted for this volume of the Proceedings of the Charleston Conference.

ALTERNATIVE ACCESS MODELS

In the context of a flat line budget and the need to cancel titles, it is with trepidation that teaching faculty are still asked to share their serial requests. It is appropriate, but unnerving knowing that in all likelihood there is little or nothing that can be done to address those needs. In FY 2009 at Tarver Library, however, several opportunities arose for adding access to quality serials for a modest investment through consortia agreements.

Consortia can benefit everyone. Vendors can potentially reduce or redirect some of their sales efforts and administration, while libraries can enjoy savings through economies of scale. Consortia can be diverse and geographically extensive like LYRASIS, whereas others can be

localized. Tarver Library, as a part of Mercer University and by virtue of her status as a sister library to the Mercer School of Medicine Library, was able to enjoy the benefit of participation in a regional consortium of Georgia's leading research libraries, GETSM.

As participants in GETSM, Tarver Library enjoys, thanks to the leadership of the Electronic Resources Librarian at the School of Medicine, access to consortium serial collections with two leading scholarly publishers, totaling approximately 2,400 titles. In each case, a common requirement existed: Maintain the current level of expenditure and convert all print subscriptions to online. Varying by vendor, costs ranged from a small percentage addition to convert to online-only, to a percentage fee for continuing duplication in print. Each consortium member enjoys access to all of the current online titles of other consortium members. The caveats of this access model, naturally, are that perpetual access is only earned for titles to which an individual library subscribes and the overall collection changes beyond the control of the individual library as member libraries add and discontinue specific titles. In a time of harsh budgetary challenges, however, this is of little concern because the access achieved for the investment is significant.

The transition to online versions of these two publishers' journals enables Tarver Library to serve her constituents more effectively. Serving several regional academic centers in counties north and south of Macon, GA, articles in print journals were only available to regional academic center patrons through an internal Inter-Library Loan arrangement. Now, however, timely remote access is available to these resources to all regional academic centers patrons, many of whom are non-traditional students and whose physical presence on a campus property may be infrequent.

Tarver Library, licensing only a small number of the serials offered by these publishers, had to reinvest a modest, but significant budget-wise, amount of the money saved from cutting unwanted serials to move to the online-only model of access. The lion's share of business with these publishers is by the highly research intensive and technical School of Medicine. As a colleague there told Timms, "You're coming to the potluck and you're bringing a spoon!" Additionally, one of the most popular investments with teaching faculty was Elsevier's Science Direct Freedom Collection, and while still a significant investment for Tarver Library's constrained budget, the cost was substantially less than it could have been, due to the School of Medicine's significant investment in Elsevier titles. All Mercer University libraries share access to each others' Elsevier titles.

As Tarver Library's Electronic Resources Librarian, Timms considers himself fortunate to have these opportunities presented to him, rather than having to seek out possibilities. Tarver Library was able to provide access to several titles listed on faculty, particularly science faculty, wish lists and for the funds invested compared to the access gained, the efficiency was high.

USING PROCESS MAPPING TO ASSESS AND IMPROVE ERESOURCES WORKFLOW

Kelly Smith has worked with serials and electronic resources at Eastern Kentucky University (EKU) Libraries since 2005 and has focused most recently on process mapping as a way to improve eResource management and workflows.

The two basic components to successful eResource management are effective workflow processes and effective management tools. The continuing resources team at EKU Libraries often uses process mapping in the form of deployment flowcharts (Laughlin) to assess and improve their workflows and processes and to evaluate existing tools. They have used this approach for analyzing processes involving databases, eBooks, and eJournals. Deployment

flow charts are used to visualize the responsibilities of each participant in a particular workflow, regardless of where that person fits in an organizational hierarchy. Using this method, one can quickly discover problem areas such as redundancies, communication gaps, unnecessary steps, or lack of appropriate tools.
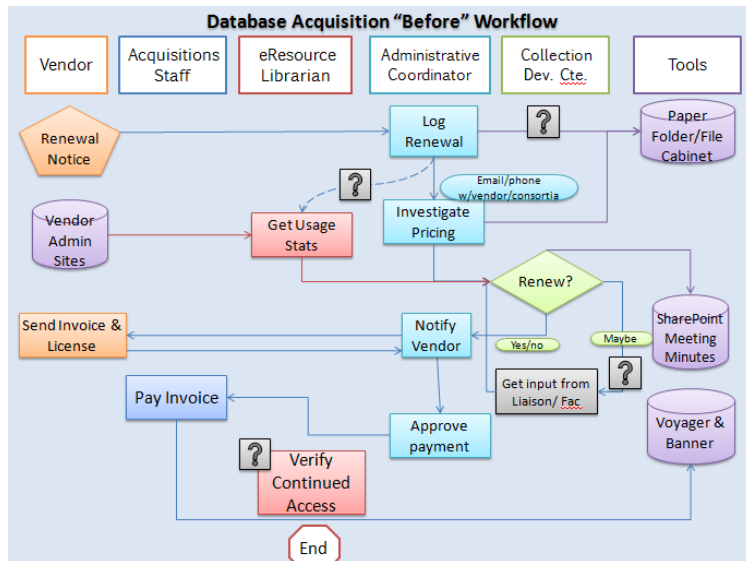
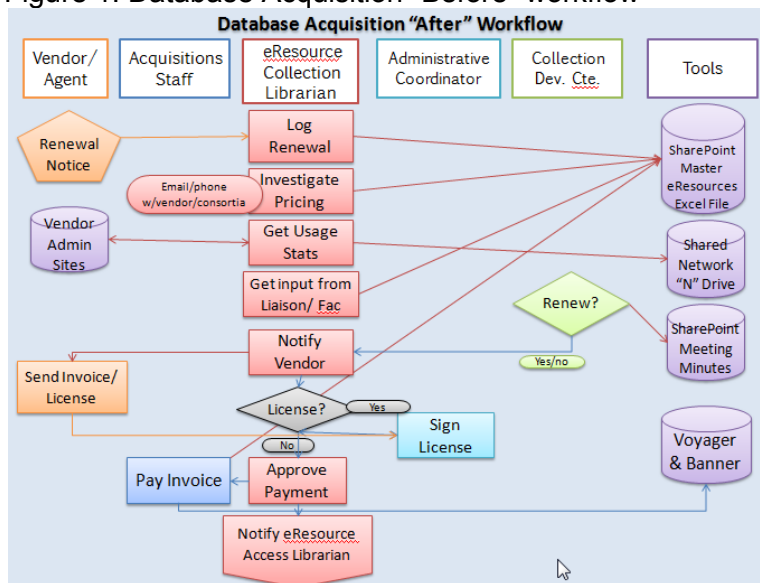

Figure 1: Database Acquisition "Before" workflow

Figure 2: Database Acquisition "After" Workflow

The preceding figures illustrate how they changed their database acquisition and renewal workflows to make them more efficient. Areas marked with question marks were identified as particular problem areas, and were in most cases attributed to poor communication in task hand-off and to the lack of shared tools.

As a result of this analysis, the process was re-worked to increase efficiency and clarify the need for effective communication and information sharing. Additionally, by agreeing on a set of shared tools, we were better able to share data and track tasks. As of October 2010, we

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primarily relied on two tools for tracking data: Microsoft Office's SharePoint software and a shared institutional network computer drive, referred to as the "N" drive.

SharePoint (Microsoft's web-based collaboration tool) is effective for creating single tracking documents that are updated by multiple people (master lists with assigned tasks, etc.). Figure 3 illustrates the type of information tracking that the EKU Library acquisitions and continuing resources teams maintains in SharePoint. This eResource tracking tool pulls together subscription data about all of their databases and packages, allows for tracking of renewals and trials, and provides vendor administrative information. It is accessible via the web, it has built-in features that assist with shared editing (two people can't edit a document at the same time, one can be alerted when a file is edited, etc.) and it is secure and allows for specific people to have permission to edit or view. Unfortunately, SharePoint's file structure is fixed - one cannot easily move a file from one folder to another. One must delete the file from one place and then re-upload it. Also, one EKU Library department lost all of the files in one of their SharePoint folders during a system upgrade - there had apparently been no back-up.

	A Title	B Resource Type	C FT?	D Hegis	J 2010-2011	K Renewal due date	L Source/Platform	M Consortium?
80	PsycINFO	DB - Serial	NO	PSY-D		KYVL - n/a	EBSCOhost	KYVL
84	SIRS Researcher	DB - Serial	NO	MUL-D		n/a	OCLC	no
85	Social Sciences Citation Index	DB - Serial	NO	MUL-D	####	July	Web of Science	no
86	Social Services Abstracts	DB - Serial		SWK-D		n/a	CSA Illumina	no
87	Social Work Abstracts	DB - Serial DB - Media DB - Other eJournal collection eJournal		SWK-D	####	July	EBSCOhost	no
88	Sociological Abstracts	eBook collection eBook staff software		SOC-D	####	September	CSA	SAALCK/Lyrasis
89	SPORTdiscus			EXE-D	####	July	EBSCOhost	no
90	Zoological Record			BIO-D	####	July	Web of Science	no
91	Counseling and Therapy in Video			MUL-D		n/a	Alexander Street Press	no
92	Scola	DB - Media	n/a	FLS-D		October	Scola	no
93	African American Experience	DB - Other	n/a	?	####	July	Greenwood	no
94	Ancestry Library Edition	DB - Other	n/a	HIS-D		January	Proquest	no
132	JSTOR (Backfiles)	eJournal collecti	FT	MUL-SE		*	JSTOR	no
133	JSTOR A&S I (Hosting fee)	eJournal collecti	FT	MUL-SE		February	JSTOR	no
134	JSTOR A&S III (Hosting fee)	eJournal collecti	FT	MUL-SE		February	JSTOR	no
150	eBrary education collection	eBook collection	FT	EDD-ME		n/a	eBrary	no

Figure 3: SharePoint eResource tracking tool

The N drive (their shared institutional network drive) works well for storing and organizing sets of files (usage statistics, logs of MARC record files, invoices, contracts, etc.). It is, in essence, a virtual file cabinet. It is more useful for storing lots of documents because its file structure is more organic and customizable than SharePoint's. Unfortunately, there's not a way to tell if someone else is currently editing, so when multiple people edit N drive documents, there's a potential for version conflicts. Also, it cannot be accessed from off campus, unlike SharePoint. Finally, in terms of usage statistics, this has only been a stop-gap measure. They are now transitioning all statistics storage to Ustat, the statistics gathering tool offered as part of SFX, their OpenURL link resolver. Sushi -compliant reports are automatically harvested by Ustat, and they are also gradually uploading all non -sushi compliant reports there. This vendor-hosted service provides data gathering and reporting capabilities that the N drive can obviously not provide.
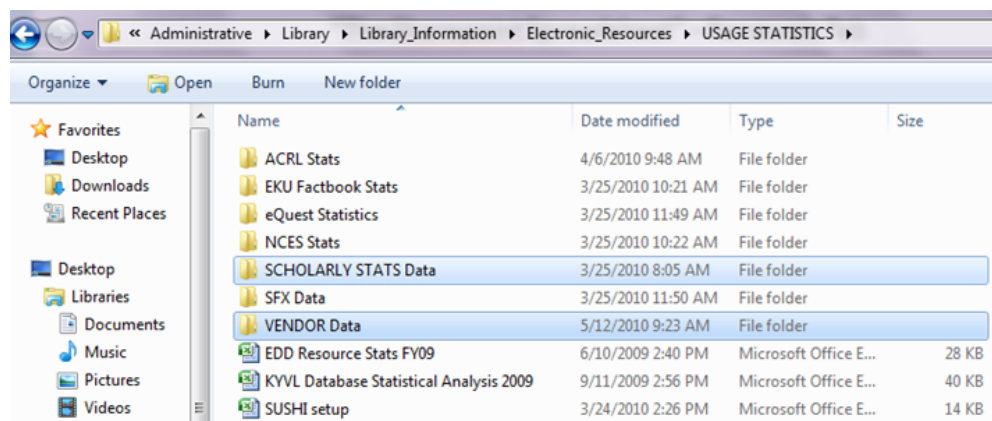
Figure 4: Data tracked in the "N Drive"

SharePoint and the N drive provide very useful containers for documents and offer the capability to share editing responsibilities, but they are back end tracking tools that do not generate any kind of publicly accessible information. EKU Libraries also maintain a database of databases that generates a public view. This is an additional tool that must be edited manually, in addition to the ILS and the SharePoint tracking documents. Finding a single tool that will address all of these complex purposes has been a challenge, to say the least.

Commercial ERMs that were explored seemed to mainly serve the container function. "Ticklers" and "Reminders" were not deemed adequate substitutes for actual workflow management. So EKU Libraries decided to build their own Drupal-based eResource management system with integrative architecture that will serve as a back-end management tool which will populate a searchable eResource list for patrons. The desired fields and functionality are outlined at **http://tinyurl.com/drupaldb** with implementation targeted for spring 2011.

CONCLUSION

Electronic resources as a profession continues to change on a monthly, if not weekly basis. In many cases there are proprietary tools that can assist an electronic resource professional in accomplishing the daily tasks that must be accomplished in order to successfully maintain the electronic resource collection. However, many times the resources needed to acquire these proprietary resources are not available and electronic resource professionals must find low cost or no cost solutions to the issues they are facing.

Another shift academic libraries are facing is the need for more people to work with electronic resources and their maintanance. There are many ways of accomplishing the creation or restructuring of units to better meet the needs of the institution. In this situation as well many electronic resource professionals find themselves with no additional funding to restructure or hire new staff, and therefore have to find creative solutions to these issues. Hopefully this article provided some ideas and solutions in this area as well.

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