

**Chapter Council Presents Roundtable #3:
Changes in Technical Services in a Digital Environment**

Helpful Resources

**1. Dollar D, Gallagher J, Glover J, Marone K, Crooker C. Realizing what's essential: A case study on integrating electronic journal management into a print-centric technical services department. Journal of the Medical Library Association 2007; 95 (2): 147 –155.
<http://www.pubmedcentral.nih.gov/articlerender.fcgi?artid=1852630/>**

Abstract

Objective: To support migration from print to electronic resources, the Cushing/Whitney Medical Library at Yale University reorganized its Technical Services Department to focus on managing electronic resources.

Methods: The library hired consultants to help plan the changes and to present recommendations for integrating electronic resource management into every position. The library task force decided to focus initial efforts on the periodical collection. To free staff time to devote to electronic journals, most of the print subscriptions were switched to online only and new workflows were developed for e-journals.

Results: Staff learned new responsibilities such as activating e-journals, maintaining accurate holdings information in the online public access catalog and e-journals database (“electronic shelf reading”), updating the link resolver knowledgebase, and troubleshooting. All of the serials team members now spend significant amounts of time managing e-journals.

Conclusions: The serials staff now spends its time managing the materials most important to the library's clientele (e-journals and databases). The team's proactive approach to maintenance work and rapid response to reported problems should improve patrons' experiences using e-journals. The library is taking advantage of new technologies such as an electronic resource management system, and library workflows and procedures will continue to evolve as technology changes.

Highlights

- Approximately 700 print subscriptions were shifted to electronic only. A core collection of key biomedical journals is maintained in print, along with a steadily

decreasing number of titles that do not yet have acceptable online access. The latter titles receive minimum processing and are not checked-in, claimed, or bound.

- Communication was key to the reorganization effort. The serials staff has weekly group meetings, and each team member has a weekly check-in meeting with the supervisor.

Implications

- A reorganization process is never easy, but staff reacted well to learning new skills. Training staff to manage electronic resources requires substantial one-on-one time with the supervisor and may take many months.
- The main library's Electronic Collections Department was a key resource in the reorganization, and the library is planning future collaborations to manage electronic resources more effectively for the Yale University Library System.
- Migrating to electronic-only journal subscriptions is based on the premise that libraries and publishers will succeed in coming up with robust e-journal archiving solution

Valuable Yale serial job descriptions and workflow documents referenced in this article:

- Collection Development and Management Department. Job description: acquisitions assistant III. [Web document]. New Haven, CT: Yale University Library, 2005. [cited 17 Nov 2006].
<http://www.med.yale.edu/library/job/AcqAsstD.pdf>
- Collection Development and Management Department. Job description: acquisitions assistant II. [Web document]. New Haven, CT: Yale University Library, 2005. [cited 17 Nov 2006].
<http://www.med.yale.edu/library/job/AcqAsstC.pdf>
- Collection Development and Management Department. Medical Library. Electronic resources workflow document. [Web document]. New Haven, CT: Yale University Library, 2006. [cited 17 Nov 2006].
<http://www.med.yale.edu/library/job/EResWorkflowMed.pdf>

2. MIT Libraries. Access Problem Solving (digprob). Problem Solving Primer: Common Problems. **http://libstaff.mit.edu/colserv/digital/digprob/problem_primer.html**

An interesting troubleshooting guide from MIT for electronic resources using Serials Solutions is also referenced in the Dollar article. It includes:

- server problems,
- authentication (both IP and password),
- subscription issues,
- proxy server problems,
- URL changes,
- interface requirements,
- network problems.

4. Going online: academic libraries and the move from print to electronic journals
Toni Fortini. Library Student Journal, October 2007.
<http://www.librarystudentjournal.org/index.php/lj/article/viewArticle/53/102>

Abstract

Academic libraries are increasing the number of electronic journals (e-journals) in their collections. While patrons enjoy access to articles with the click of a button, librarians face the complex process of implementing and maintaining e-journal subscriptions. This study discusses the results of a survey of academic librarians and details the problems and concerns that arise during an e-journal project, the issues that persist throughout e-journal acquisition and management, and the phases in which these problems arise. The study found that librarians considering a switch to electronic access must be prepared to face continuing problems with access, archiving, cost, staffing/workflow, and technology. The study also indicates a lack of consensus between the different levels of administration regarding problems and concerns with e-journal management, suggesting a need for better administrative communication.

5. The E-only Tipping Point for Journals: What's Ahead in the Print-to-Electronic Transition Zone. Richard K. Johnson and Judy Luther. Washington, DC: Association of Research Libraries, © 2007.
http://www.arl.org/bm~doc/Electronic_Transition.pdf

This study seeks to discern how far the process of migrating to electronic-only journal publishing has come and to examine library and publisher perspectives on the dynamics that will govern the process of replacement of print editions with entirely electronic journals. Our goals are to:

- Identify the forces that have brought us to this point and are propelling or inhibiting further moves toward electronic-only journals.
- Understand key issues affecting the emergence of e-only journals and e-only journal subscriptions.
- Facilitate further communication about these issues among and between publishers and librarians so that barriers to more effective and efficient scholarly communication can be reduced.

6. Against the grain. Nov. 2007; 19 (5).

This issue contains “eight articles that discuss the complications, solutions, and new workflows for technical services that develop as a result of the increase in technological solutions and electronic resources.”

1. *Use of Technology in Managing Electronic Resource Workflow.* Nathan Rupp and Liisa Mobley

— Requests for electronic resources are not as straightforward as those for print resources. This means additional steps and new workflows. p. 18

2. *The Future of the Academic Library Serials Collection.* Barbara M. Pope

— Predicting the future of serials collection development is difficult. Doubtless we will have both electronic and print titles for years to come. p. 22

3. *Moving beyond MARC: Initiating and Embracing Change in a Traditional Technical Services Department.* Melanie Feltner-Reichert and Marielle Veve.

— This article discusses integrating non-MARC metadata into technical services. p. 28

4. *Technical Services Workflows: A Comparison of Two Academic Libraries.* Susan Mueller.

— How do Library A and Library B approach processing of monographs and serials and is one better than the other? p. 36

5. *Catalog Information and User Expectations in an Amazoogole World: Too Much? Too Little?* Martin L. Knott, Doreen R. Bradley, Deborah S. DeGeorge, and Jim Ottaviani.

— A comprehensive, multi-phase assessment of a library's selection, acquisition, and cataloging workflow with the objective of making operations in these areas more cohesive and efficient. p. 40

6. *It Never Ends: Technical Services and Planning in a Changing Environment.* Barton, Michael Wright, and Randy Roeder.

— This represents one library's approach to reviewing and assessing traditional functions in light of changing user needs. p. 46

7. *Old Wine in New Bottles; RePurposing MARC Records for Electronic Databases.* Carol Ou and Gwen Gregory.

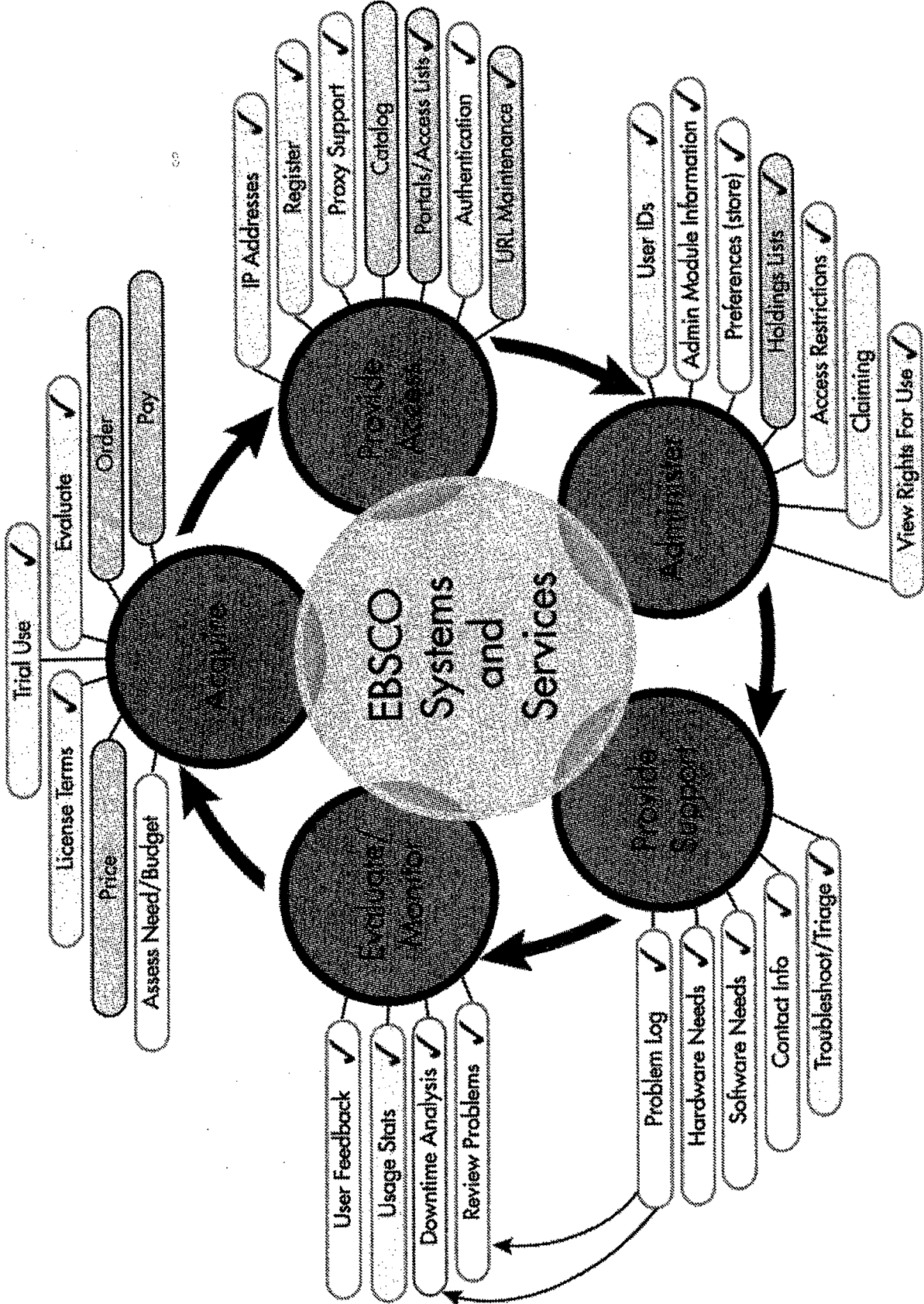
— Tutt Library at Colorado College has not been the only library to consider the problem of efficiently and effectively maintaining database links on the Web. p. 52

8. *Technical Services Departments in the Digital Age: The Four R's of Adapting to New Technology.* Leslie Burke and Stephanie McConnell.

— What is a library manager to do with an employee who no longer fits the job function? p. 58

7. Information Organization Futures for Libraries. Brad Eden. Library technology reports, Nov/Dec. 2007; 43 (6).

In this issue, Eden focuses "not only on current initiatives around 'reinventing' the OPAC and all of its attendant possibilities (provided in the context of economic realities)," but, in the report, Eden also looks at "opportunities to get away from the OPAC and focus resources on new areas, such as 3D information visualization, mass digitization, Library 2.0, and metadata related to digital resources."



In the last issue of *ATG* we printed **EBSCO's e-resource lifecycle graphic** within the **Dixon Brooke, Jr.** interview (p.74). There were technical problems, in terms of transferring data, which caused a portion of the graphic not to appear. We are rerunning the graphic above, in its entirety, and apologize for not realizing the error.

Against the Grain, April 2006, pg. 16. (v18, no. 2).

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Steps in making e-resources available

1. Determine best source from which to purchase resource.
2. Determine if it should be purchased individually, jointly with UNT, or as a consortial purchase.
3. If electronic journal aggregation purchase, reconcile title lists with library's current print subscriptions, determine if library needs additional e-titles from collection offered, and with some full-text providers, determine overlap, if any, with existing resources.
4. Decide on type of access needed for library site license, number of seats, etc.
5. Where necessary, negotiate terms of site license with publisher's agent. Execute site license with Legal Affairs' approval. Maintain files of site licenses.
6. Approve invoices for payment.
7. Register library's IP addresses for online access, communicating with subscription vendor to get correct customer numbers. Register and record administrative passwords. Check access to see if it's functional.
8. Notify original requestor that the e-resource is available.
9. Add databases to library's web page and plan and develop training for users. Publicize new databases. Hold training sessions.
10. Add electronic titles or databases to library's electronic resource management system.
11. Add electronic titles to library's web page, set up links for PubMed, OVID, and 360 Linker. As appropriate, report titles to DOCLINE.
12. Renew subscriptions annually, or as agreed in the site license.
13. Trouble-shoot online access problems and notify users of planned outages. Monitor changes in content (dropped or added titles, etc.) and change affected links.
14. For databases, participate in ongoing training for planned upgrades.
15. Periodically, go over subscription lists to see if some publishers have added complimentary online access to their print journal subscriptions.
16. Collect usage statistics annually. Re-evaluate usefulness of database or e-journal collections, as needed.
17. Monitor listservs and maintain continuing contact with other libraries in the consortium about important updates to e-resources.

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