Dressing your library for success: The importance of electronic resource alignment

Matthew Ragucci, MLIS
Library Solutions Architect
Introductions

Personal background and session structure
Personal Background

Education
• Bachelor of Arts History, Spanish (Marist College, 2007)
• Master of Library and Information Science (Rutgers University, 2010)

Internships
• Fair Haven Public Library
• Franklin D. Roosevelt Presidential Museum & Archives

Professional roles
• Various roles at public libraries in Circulation, Reference and Management departments
• Reference & Instruction Librarian / Technical Services Manager at Brookdale Community College
• Technical Services Manager > Library Solutions Architect at Wiley

Publications
• MARC Metamorphosis: Transforming the Way You Look at E-Book Records (2019)
• Evidence-Based Acquisition: A Real Life Account of Managing the Program (2017)
# Session Structure

## Defining the work
- Why we fight
- Technical services definitions
- Referral traffic

## Content provider roles
- Metadata Provisions
- Discovery Feeds
- Working with vendors

## How Librarians work to...
- Promote Discovery
- Improve Access
- Troubleshoot Issues

## Closing
- Activity
- Reemphasizing implications
- Resources
- Questions
Disclaimers

Different workflows

American perspective

Informative yet informal
Defining the work

Definitions, rationale and data points
Why we fight

**Discovery** and **Access** contribute to content **Usage**.

**Usage** is a key metric in determining content **Value**.

**Value** is realized by **Libraries** and **Content Providers**.

Image from *Braveheart* (1995)
E-resource lifecycle

- **Acquire**
  - Assess need/budget
  - Trial use
  - License Terms
  - Price
  - Evaluate
  - Order/Pay

- **Provide Access**
  - IP addresses
  - Proxy Servers
  - Catalogue
  - Discovery Layers
  - A-Z Lists
  - Holdings

- **Evaluate & Monitor**
  - User feedback
  - Usage statistics
  - Downtime analysis
  - Review problems

- **Provide Support**
  - Problem log
  - Hardware needs
  - Software needs
  - Contact info
  - Troubleshoot/triage

- **Administer**
  - User IDs
  - Admin module info
  - URL maintenance
  - Claiming
  - Access Restrictions

Information retrieved from “NASIG Core Competencies for E-Resources Librarians”
Technical services definitions

Content Provider

Vendor

Journal A-Z Lists

MARC Records

Institutional Repositories

Discovery Layers

Knowledgebases

KBART files

Link Resolvers

Proxy Servers

LibGuides

COUNTER/SUSHI
Referrer data caveat

Wiley Online Library Referral Traffic – June 2019

- Search Engines: 58%
- Typed/Bookmarked: 18%
- NIH: 16%
- Library Channels: 6%
- Social Networks: 2%
How librarians work

Promoting discovery, access, and troubleshooting
“Libraries currently support **preparation** and **dissemination** phases of the research cycle most heavily.”

Retrieved from “Beyond the index: research and discovery services in a health sciences library.”
SANLiC Preconference Workshop

Discovery pathways

- **Agent gateways**: EJS, J-Gate
- **Web-scale search**: Google, Google Scholar, Bing, Baidu
- **Publisher platforms**
- **Aggregator platforms**
- **Document delivery**
- **Institutional repositories**

**Full text access**

**Students**
- Library Systems
  - OPACS, A-Z lists, link resolvers etc
- Library services
  - Pubget, BrowZine, Boopsie
- Subject specific A&Is
  - CABI, ERIC, PsycInfo, Inspec
- TDM services
  - RightFind XML, Linguamatics

**Researchers**
- Article management tools
  - ReadCube, Colwiz, Zotero
- Major evaluative A&Is
  - CAS, Web of Science, Scopus, PubMed
- Current awareness
  - Meta, Sparrho

**Librarians**
- Discovery Services
  - Primo, Summon, EDS, WorldCat
- Professional networks
  - Medscape, Sermo, doctors.net
- Social Networks
  - Facebook, LinkedIn, Twitter
- Subject portals
  - RePEc, SSRN, PhilPapers

**Faculty**
- Corporate info tools
  - Quosa, DirectPath
- SCNs
  - Mendeley, ResearchGate, academia.edu

**Discovery pathways**

Information retrieved from “Blazing new paths: Charting advanced researcher patterns.”
Discovery Workflows

MARC Records → Catalog (OPAC) → Library Discovery Layer → Students, Researchers, Librarians, Faculty

Non-sanctioned discovery

A&I Databases, Institutional Repository, Digital Collections

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### Fast Facts:

- Discovery through Description
- Serials and monographs
- Preferred data elements
- Not all records are equal
- AACR2 > RDA
- Use MARCEdit, it’s free!

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**MARC Records**

**Table of contents**: Book summary
A companion to business ethics / edited by Robert E. Frederick.

The book can be used as a comprehensive text for introductory or advanced courses in business ethics, as a reference for teachers and writers in the field, or as a guide for other academic or business persons who wish to become familiar with the central issues in the field.

To enhance its usefulness as a reference work, the volume includes bibliographies of the relevant literature, a list of internet sources for material on business ethics, and an extensive index.
Discovery Layers

Fast Facts

- Allows user to discover library content sources through a single search
- Chapter/article metadata comes from vendor index
- Requires institutional-level configuration (content providers and branding)
- Ranking algorithm for relevant and subscribed content
- Symbiotic relationship with KBART and link resolvers

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Access: A bridge too far

Knowledgebases, link resolvers, A-Z lists, proxy servers, federated access, LibGuides and consortia resources
Building bridges for our users

Create as **many sanctioned portals** as possible...

...by **using all the tools** at our disposal...

...that drive to **licensed, trackable content**
Utilizing Library Access Tools

**Journal A-Z Lists**
Directory of journal titles available to library users, outbound links to source content.

**LibGuides**
Online reference and instruction guides, designed for supporting research and library resource use.

**Knowledgebases**
Databases vendors use to align content provider products through collections.

**Link Resolvers**
Source to target connection designed to connects readers to licensed full-text without extra authentication.

**Proxy servers**
Used by libraries to give access from outside the library’s computer network to restricted-access websites that authenticate users by IP address.

**KBART**
Data standard designed to cleanly indicate title/collection relationships and target links to content.
Journal A-Z Lists

**Fast Facts:**

- Sometimes called journal portals
- Can also be utilized for databases
- Alphabetical index of available titles
- Include date range coverage
- Different dates, different DBs
- Require configuration through knowledgebases
- Should be audited to ensure continuous access or to remove titles
LibGuides

Fast Facts:

- Links to resources but with explanations or instructions
- Springshare is the sole vendor
- Require web editing skills and constant maintenance
- Work with faculty for content and promotion
- Track traffic and statistics
Proxy Servers

Fast Facts:

• Maintain institutional configuration stanza; a whitelist of appropriate targets

• Major products: EZproxy (OCLC), WAM (III) and TDproxy ((TDNet)

• Vendor-neutral solution that connects to many content providers

• Require maintenance and testing

• Append to all resources links (MARC records, discovery layers or A-Z lists)

• Clear IPs with content providers

African Journals (former)

2018-10-10

In order to provide access to resources that use https, your EZproxy

Title African Journals (Sabinet ePublications)

URL http://www.journals.co.za/

H https://journals.co.za
H https://www.journals.co.za
H journals.co.za
H www.journals.co.za
D journals.co.za
Link Resolvers

**Fast Facts:**

- Source to target connection
- Providers citation chasers with easy access
- Unavailable content gets channeled to ILL requests
- Work with publishers for base URLs and rebranding
- Require configuration through the vendor knowledgebase

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Knowledgebases

Fast Facts:

• Required for many products:
  ✓ Link resolvers
  ✓ A-Z Lists
  ✓ Discovery Layers
  ✓ MARC records

• Vendor feed from content providers

• Collections map to content packages (not specific subscriptions)

• Collections can be created to reflect institution-specific holdings

• Must be constantly monitored
KBART

Fast Facts:

- **Knowledge Base And Related Tools**
- Recommended practice created in 2007 to ensure the timely transfer of accurate data to knowledgebases vendors and link resolver providers

- Data sources for knowledgebases
- Created by content providers & libraries
- Has evolved over time to meet emerging needs of libraries (books, OA, consortia)

- Files subject to updates (data corrections, link updates, new publications, transfer/withdrawn titles)
- Require frequent updates

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KBART: A Brief History

- 2007 UKSG/NISO Working group starts
- 2010 Phase I RP released
- 2011 KBART provider endorsements
- 2014 Phase II released / NISO Standing Committee
- 2017 KBART Automation Working Group
- 2019 Phase III / Automation RPs released
### KBART file for serials content

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Troubleshooting E-Resource Issues

- Determine as much as you can prior to contact an external party
- Try to be as descriptive as possible (include screengrabs or videos)
- Be persistent and make sure the issue is fully resolved
- Don’t not be afraid to escalate (sales reps or supervisors)
- Track issues in system (instead of just answer emails and calls)
- Learn from problems - work into purchasing decision and ask prospective vendors

Essential Skills and Knowledge for Troubleshooting Access Problems

1. Overview of discovery and access environment
2. Common points of failure
3. Authentication and authorization
4. OpenURL and link resolvers
5. Differences and similarities between access for OA/free resource and license/paid resources
6. Discovery index content, activations and linking mechanisms
7. Metadata resources, quality, and impact on access
8. Detailed interaction between link resolver, discovery index, discovery layer, and LMS
9. Distinguishing isolated issues from widespread problems
10. Effective communication with system vendors and content providers

Retrieved from: “Essential skills and knowledge for troubleshooting e-resources access issues in a web-scale discovery environment.” (2017)
Content provider roles

How publishers help drive content discovery and access
Content provider responsibility for metadata

- MARC Records
- KBART files
- COUNTER Data/SUSHI info
- Link Resolver setup
- Information on Proxy Stanzas
- Data to Discovery Layers
Discovery Dataflows

Publisher
- Create and delivery FT feeds

Vendor
- Repository
- Central Index
- Ranking

Library
- Linking Options
  - DOI Direct
  - OpenURL
- Link Resolver
- Knowledgebase
  - Select Collections
  - Prioritize Collections
  - Configure DOI Linking
  - Configure Direct Linking
  - Configure OpenURL
  - Select Targets

User
- Select Limit Search Databases
- Set Ranking Preferences

CrossRef
- DOI Resolution

Platform
- CrossRef Database

Abstract
Content provider roles for troubleshooting

- Determining the real problem is half the battle (broken access has many causes)
- Blame game or apathy from content providers or vendors
- Support teams do have service level agreements to resolve cases
- Escalation tracks exist, where more experienced staff or product specialists get involved
- Opportunity to improve products and services
- Threats to revenue usually led to faster resolution

Image from *Spiderman* (2002)
Closing

Activity, implications, resources and Q&A
Activity
Activity: Dressing a specific resource

**Scenario:** Your library has just purchased an evidence-based eBook package. Trackable use of this content is critical for making perpetual access title selections and justifying your collection budget for next year. Your job is to dress this resource for success!

**Instructions:** Work independently or in pairs. Write down all of the tools you would use to set up this resource. Are any tools you would omit or add for this scenario? Why not? Nominate a spokesperson to discuss your choices and compare with the rest of the room.
Better Metadata Could Help Save The World!

By ALICE MEADOWS | JUN 13, 2019 | 5 COMMENTS

The title of this post may seem like a farfetched claim, however, no one can deny that we are currently faced with increasingly critical challenges — climate crisis, shrinking biodiversity, hunger, poverty, disease, and more. I think most of us would agree this means it’s essential for the research findings that could help address these challenges to be shared as quickly and widely as possible — and for the data behind those findings to be FAIR (findable, accessible, interoperable, and reusable). And that means…metadata!
## Vendor product alignment table

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* Funded by EBSCO

SANLiC Preconference Workshop
References


Recommended Reading


Thanks for your participation!

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