



Universitätsbibliothek

E-Media in the FU with SFX/VERDE – an integrated work
or the user is the focus

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- Goals and strategy
- How do the users find our material?
- Which piece in which program?
- The workflow
- Usage counting
- Summary

How to deal with e-media

Our electronic resources:

25.000 licensed e-journals, 1.250 Databases, 35.000 e-books (incl. national licenses, ca. 500.000), 15.000 free journals

We must

- administrate, proof, proceed and claim the material
- and present it to the users

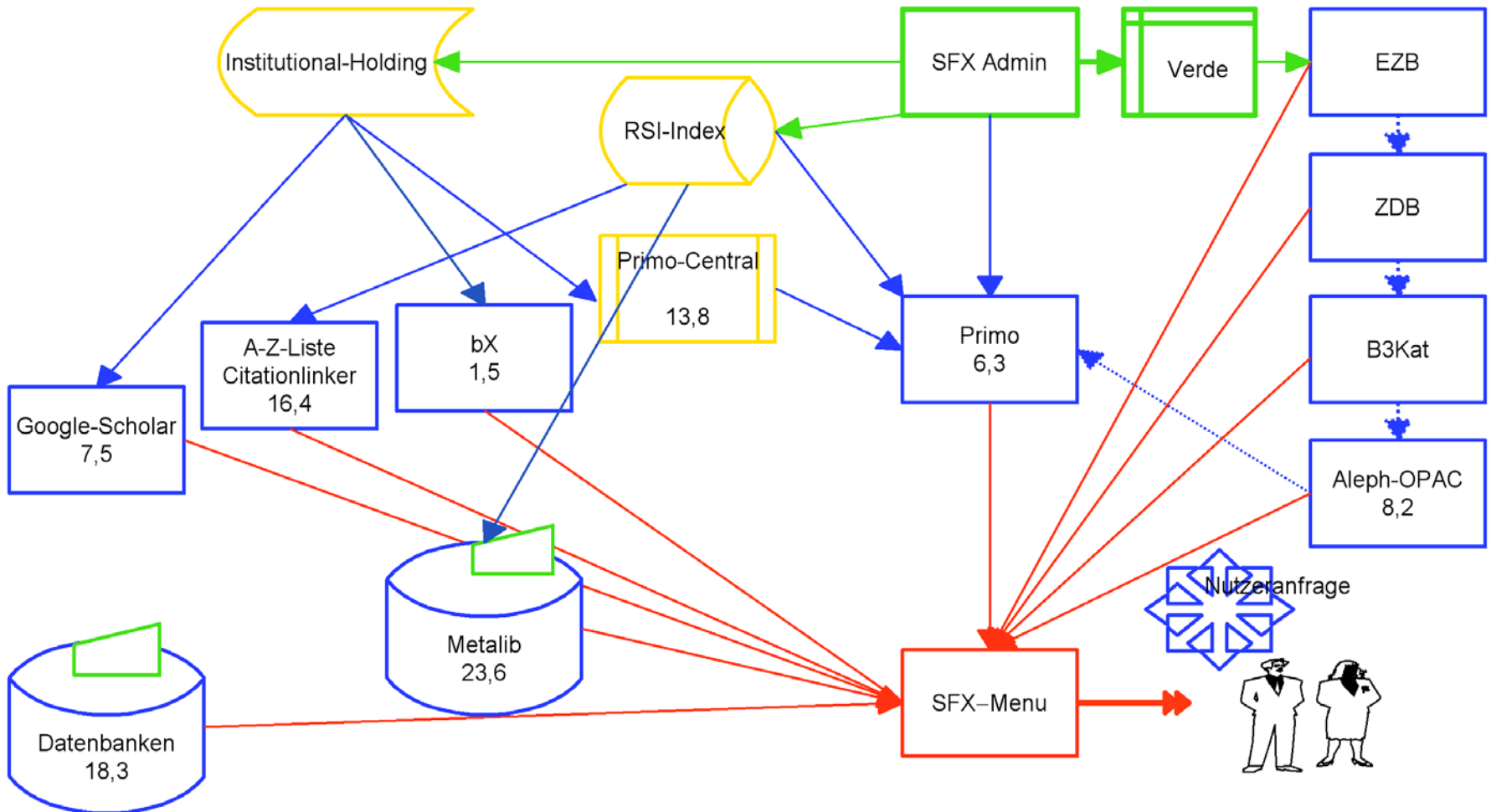
Why VERDE?

- 'Present' the material with SFX. The OpenURL resolver needs the same data structure like the ERM. Otherwise there is a lot of additional work
- VERDE is the only product with (a limited) consortial usability
- Verde is able to work with Aleph

- **Goal:** 'How to present our e-media to our users?'
(**not:** 'How to administrate' our e-resources)
- **Strategy**
 1. Use of SFX in all User Interfaces
 2. Well regulated workflow; the goal is to present all e-resources immediately in SFX/MetaLib
 3. Workflow organised
 - proper use of the backend programmes
 - avoiding additional work and expenses
 4. Training of users and staff; all staff members must know the new tools and use it properly.
- **Control:** (purpose) analyses of statistical data (logfiles) from all used programs



Bestandsinformationen: Von Verde/SFX über Endnutzersysteme zum SFX-Menu



- Other services (Citation linker, A-Z List)
 - A-Z is used twice as frequently (16,4 %) for access to e-journals than catalogue data (OPAC, union catalogue, german national journal data base ZDB)
 - Citation linker usage is relatively low
- bX: not enough experiences (too new)
- Google scholar
 - Get back users to the university
 - Usage round 7,5 %
 - One time configuration
- MetaLib
 - Presentation of the data bases
 - Federated search
 - Till now main tool for the search and access to e-journal articles via SFX (23%)
- Data bases
 - Consequent implementation of our SFX in all data bases
 - Important tool for access to e-journal articles from the data bases (18%)

- SFX/Verde (Central system):
administration of all holding information (what, where, period)
 - Data bases:
administered in MetaLib, as far as possible SFX in all data bases presented
 - Direct import to Primo: (75.000 objects)
 - Partly duplicating the information from Aleph
 - But coming directly from SFX more up to date, precise and comprehensive information
 - Also books, newspapers etc.
 - Usage of local holdings in Primo still low (5%)
 - And possible in many different ways
 - High additional usage of e-journal articles via Primo Central (ca. 14 %)
 - Export in ->EZB* ->ZDB** ->B3Kat*** ->Aleph->Primo
 - Only ca. 6.000 journals exported, further licenses via national licenses and aggregators
Aggregatordatenbanken automatically accepted
 - Asynchrony in transfer costs time
 - Errors (see next slide)
 - Low usage of e-resources via catalogue (<10%) - maintenance effort to be kept low
 - Low relevance of the catalogue for e-ressources
 - 60% of our SFX usage concerns journal articles, only 25% concerns search for journal titles,
out of this two thirds via A-Z list.
- * EZB = German central data base for e-journals, ** ZDB = German central data base for journals
*** B3Kat = Central union catalogue

Problems with export/import of data

- Different data models in SFX/Verde und EZB → filtering before export
 - Aggregator packages will be activated manually in EZB (now 10 packages)
 - National licenses, activate through EZB
 - Free journals can not be activated in EZB
 - Objects not covered by EZB (books, newspapers)
 - Journals without ISSN
- Different data models in SFX/Verde und EZB → Error files
 - Parent/Child/splits
 - Complex Thresholds
 - Threshold changes (Error in API in VERDE)
- Export to ZDB: not in use at the moment
- Export in den B3Kat: without most e-journals
- Import to Aleph: no problem
- Export to Primo: some problems with details in the normalisation rules
- Export von SFX to Primo: no problems, but duplication of data from Aleph

What is usefull for the user?

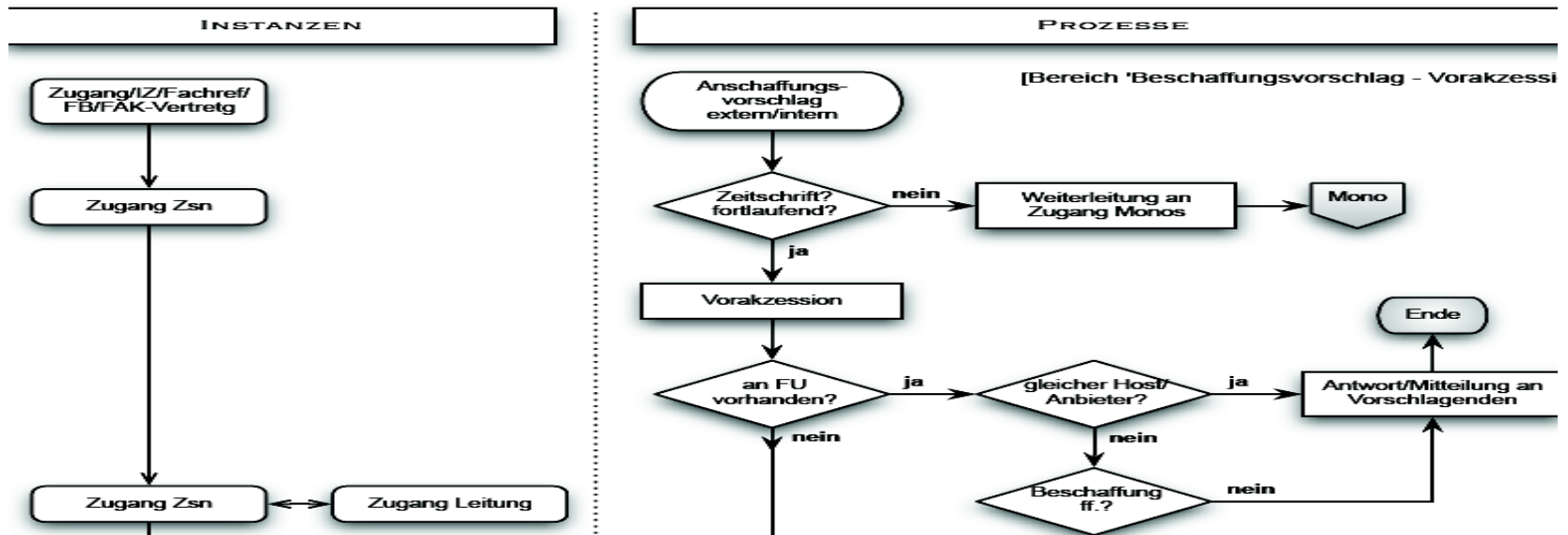
- Using OpenURL in all of the user interfaces → and keeping up-to-date data information in SFX
- One exception: In the cataloguing systems EZB and ZDB (and sometimes in Aleph) is a direct URL to the provider for the so called National licenses and aggregators from imports
- With the SFX menu, the user recognizes any time the FU Berlin as its service provider, important for
 - Marketing
 - Feedback-Service for error handling and improvement (ca. 30 feedbacks/month)
- With SFX statistics we can analyse strengths and weaknesses → Service improvements
- SFX is easy to teach
- Additional services possible (i.e. search for print version in the catalog)

Who administers what and where?

- **Our “All-rounder” with “Do-What-I-Mean button” ;-)**
- **Aleph OPAC:** Acquisition process incl. bill payment; 'Ask Verde' button to check contract information and holdings; API to SAP
- **ERM Verde:** Administration of contract information: contract period (alert before end!), admin-accounts to provider, special usage terms and conditions, 'Ask Aleph'
- **Link Resolver SFX4:** administration of inventory (which journal, book, thresholds)
- **Databases in MetaLib :** Administration **and** presentation of our data bases; federated search
- **Ticket system OTRS:** Transparent processing of all incidents (contracts, errors feedback from staff & users etc.)
- **Other databases (incl. Google):** Administrate our base URL of the link resolver
- **Ustat:** Counter Format (if required: manual correction); Sushi

The workflow

GESCHÄFTSGANG E-MEDIEN: NEU-LIZENZIERUNG EZSN/DBS (van Capelleveen, Stand:5.7.2006)



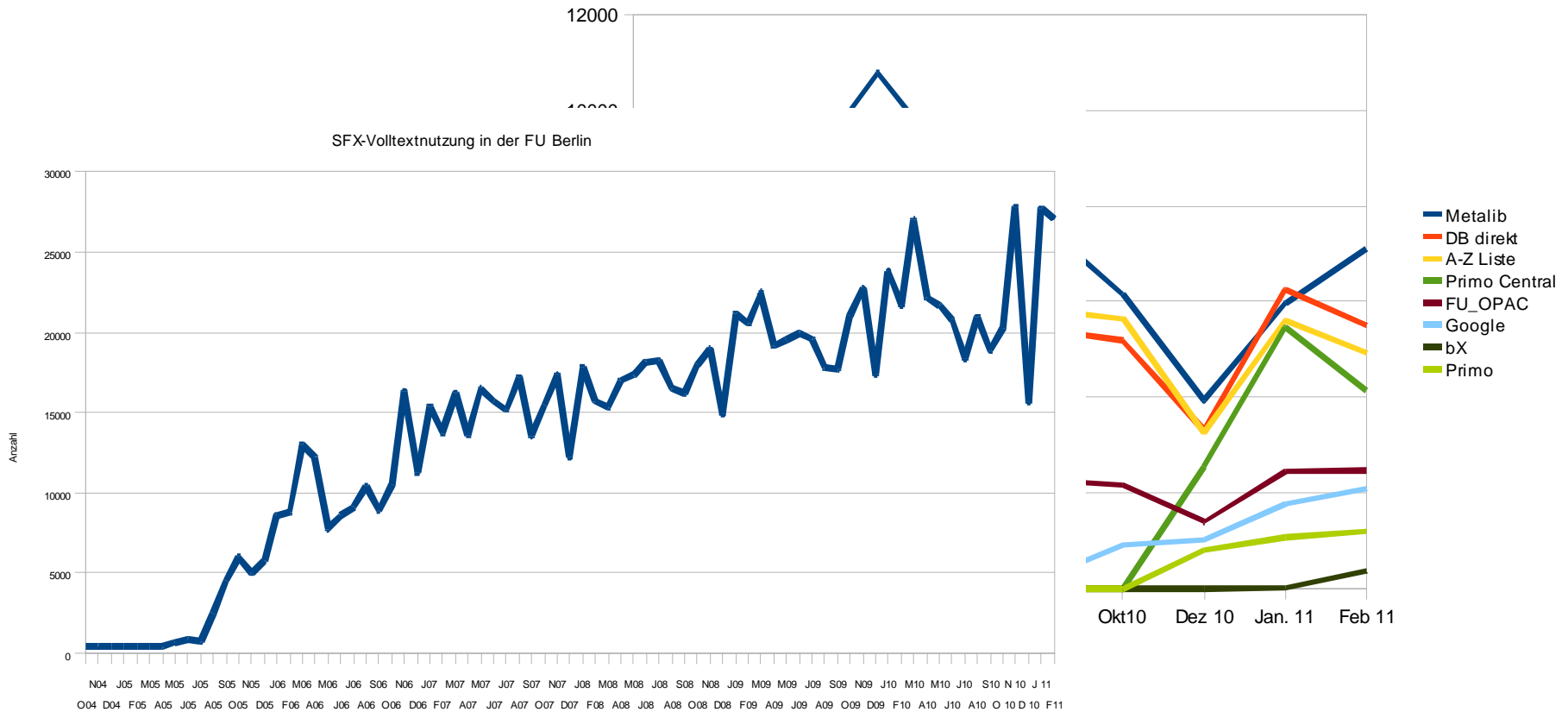
- The workflow determines, which instance must do which task
- Our workflow is described on 5 pages flow diagram and in divers working papers
- This determines the proper use of all programs
- (All) incidents as a ticket
- Some revision
 - Revision about B3Kat
 - Revision about SFX4
 - No workflow for systematic acquisition for e-media at the moment
 - No systematic analyse of usage statistics, just event driven

The integrated approach in our library system

- Administration of e-resources is an integral work of our (journal) acquisition
- The staff is high qualified, knows the tools and can perform all steps of the workflow including the normal error analysis and solution
- The staff in the reference department knows SFX and MetaLib, performs user training and informs about errors
- The Digital services team (Reference department , Acquisition, IT) administrates data bases/MetaLib
- Help in SFX from IT is necessary only in rare cases (complex errors, changing parsers, new services, migration)
- Focus to the link resolver with
 - Teaching the users
 - Administrating the link resolver base URL in all data bases
 - Quick response to errors (normal feedback messages should be answered in less than one working day)



SFX Sourcestatistik der FU Berlin



Platform	Number of Journals	Total Journal Requests
1 ACS Publications	48	66,686
2 Annual Reviews	41	12,112
3 ACM Digital Library	92	2,059

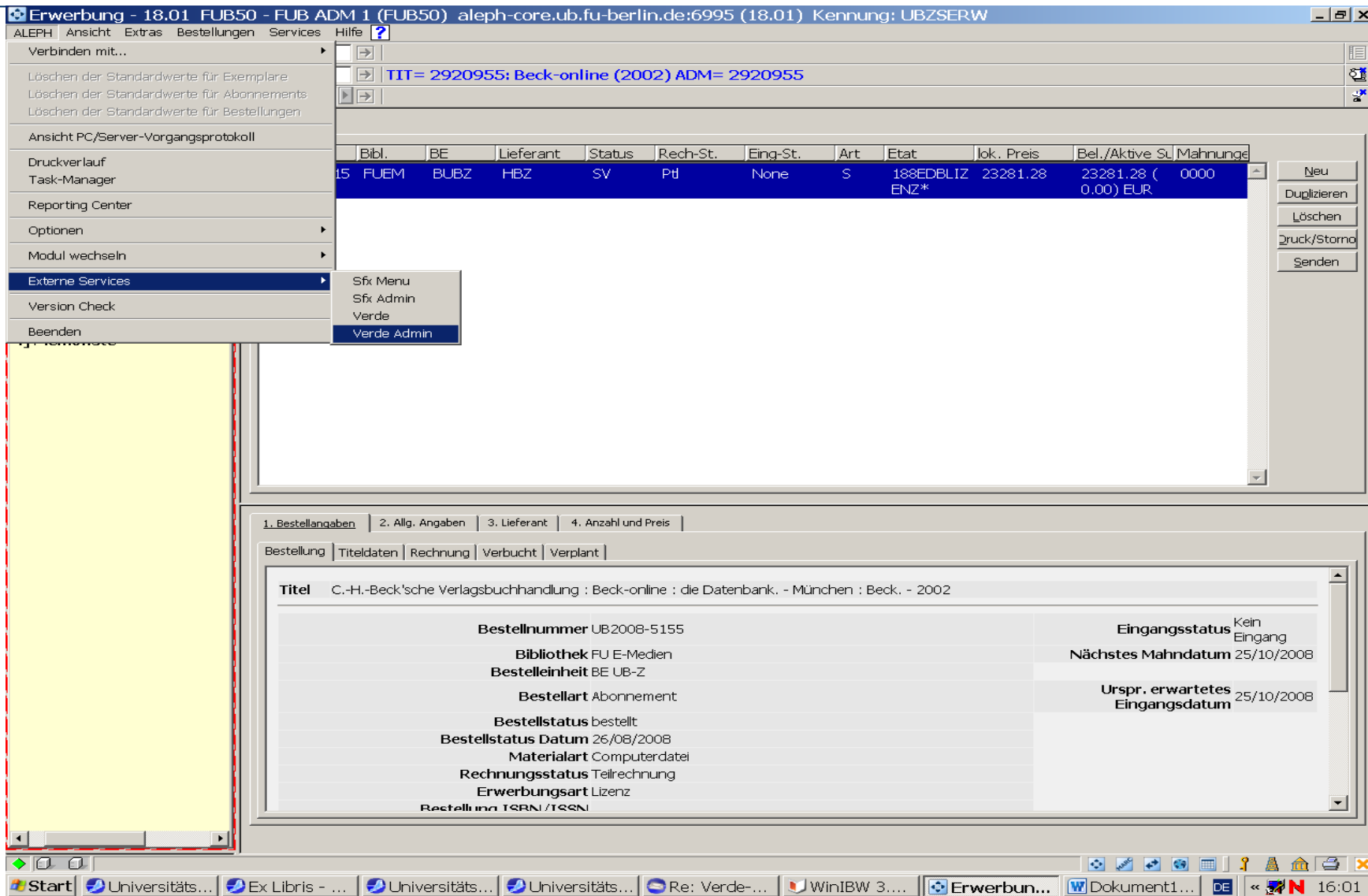
What can we learn from statistics

- Usage-statistics from SFX
 - How many users use SFX from where and what do they use?
That does not mean: which electronic material is used!
- Usage source-statistics
 - Where did the user come from or: did the user use our environment as we expect?
- Usage Ustat
 - Real stuff: what did the user download, but: not all providers count at the same way, not all data available etc.: we do only roughly know, what the user do, but: real download is 5 to 10 times more than SFX show
- Apache logs from Primo
 - The primo statistics do not say anything about the usage of the e-resources
 - We start to analyse the apache log file – no data available yet
- Usage logs from MetaLib
 - Not perfect and not easy to handle, but: we get a lot if important information missing in primo (i.e. sessions, direct connects to databases and to which, search terms etc.)

Problems/What did we miss

- National Licences/e-book targets in CKB
 - Not many e-books in SFX, mainly the National Licenses stuff
 - We don't know: are the National Licenses targets the best way to deal with this in future
 - We can create local targets, but is this a way for the future?
- Workflow Alma/Pivotal and OTRS ticket systems
 - Alma has a workflow driven way to communicate inside of the system– as far as I understand
 - Ex Libris uses Pivotal as a ticket system for customer communication
 - We use a ticket system for our internal communication too
 - How can these systems work together? (i.e. We send emails from SFX to Pivotal direct (this is an Ex Libris functionality!), but the replay is an mail address in our ticket system. Each replay from Pivotal creates a new ticket, because Pivotal deals only with their ticket ID). A smooth communication between the ticket system would lower the TCO on both sides.
- User view to print and e-media
 - At the moment, there is no direct connection between print and e-media, but
 - In case we can't offer e e-media, but a print copy, the user should see it immediately
 - Solution: additional checks (fetch, service - time consumption, disruption), not in use yet
- other?

An invoice in Aleph with VERDE link



Erwerbung - 18.01 FUB50 - FUB ADM 1 (FUB50) aleph-core.ub.fu-berlin.de:6995 (18.01) Kennung: UBZSERW

ALEPH Ansicht Extras Bestellungen Services Hilfe

Verbinden mit...
 Löschen der Standardwerte für Exemplare
 Löschen der Standardwerte für Abonnements
 Löschen der Standardwerte für Bestellungen

Ansicht PC/Server-Vorgangsprotokoll

Druckverlauf
 Task-Manager
 Reporting Center
 Optionen
 Modul wechseln
 Externe Services
 Version Check
 Beenden

Sfx Menu
 Sfx Admin
 Verde
 Verde Admin

Bibl.	BE	Lieferant	Status	Rech-St.	Eing-St.	Art	Etat	lok. Preis	Bel./Aktive St.	Mahnunge
15	FUEM	BUBZ	HBZ	SV	Ptl	None	S	188EDBLIZ ENZ*	23281.28	23281.28 (0000 0.00) EUR

Neu
 Duplizieren
 Löschen
 Druck/Storno
 Senden

1. Bestellangaben | 2. Allg. Angaben | 3. Lieferant | 4. Anzahl und Preis

Bestellung | Titeldaten | Rechnung | Verbucht | Verplant

Titel C.-H.-Beck'sche Verlagsbuchhandlung : Beck-online : die Datenbank. - München : Beck. - 2002

Bestellnummer UB2008-5155	Eingangsstatus Kein Eingang
Bibliothek FU E-Medien	Nächstes Mahndatum 25/10/2008
Bestelleinheit BE UB-Z	Urspr. erwartetes Eingangsdatum 25/10/2008
Bestellart Abonnement	
Bestellstatus bestellt	
Bestellstatus Datum 26/08/2008	
Materialart Computerdatei	
Rechnungsstatus Teilrechnung	
Erwerbungsart Lizenz	
Bestellung ISBN/ISSN	

Start | Universitäts... | Ex Libris - ... | Universitäts... | Universitäts... | Re: Verde-... | WinIBW 3... | Erwerbun... | Dokument1... | DE | 16:01

e-product record: general object information

Bread crumb tail for orientation

Short information

Option menu

Breakdown of information with tabs and subsections

Annotations:

- Bread crumb tail for orientation:** Points to the breadcrumb trail: Ebsco! > EBSCOhost American... > EBSCOhost Academic... > Academic leader
- Short information:** Points to the status bar: Status: Production License: Approved Last Sync: Done - SFX setup required (23/05/2008 15:01:11)
- Option menu:** Points to the left-hand menu with options like Summary, Acquisitions, License, Access, Admin, Trial, Cost, Usage, Workflow, Sync History
- Breakdown of information with tabs and subsections:** Points to the 'General Information' tab and its subsections
- e-Package type:** Points to the 'e-Package type' field (Selective/Aggregator)
- Status and period of validation:** Points to the 'e-Product status' and 'Activation from date' fields
- Coverage (global) and holding(local):** Points to the 'Global coverage' and 'Local Holdings' tables
- SFX synchronisation button:** Points to the refresh icon in the top right corner

Acquisition record with link to an invoice in Aleph

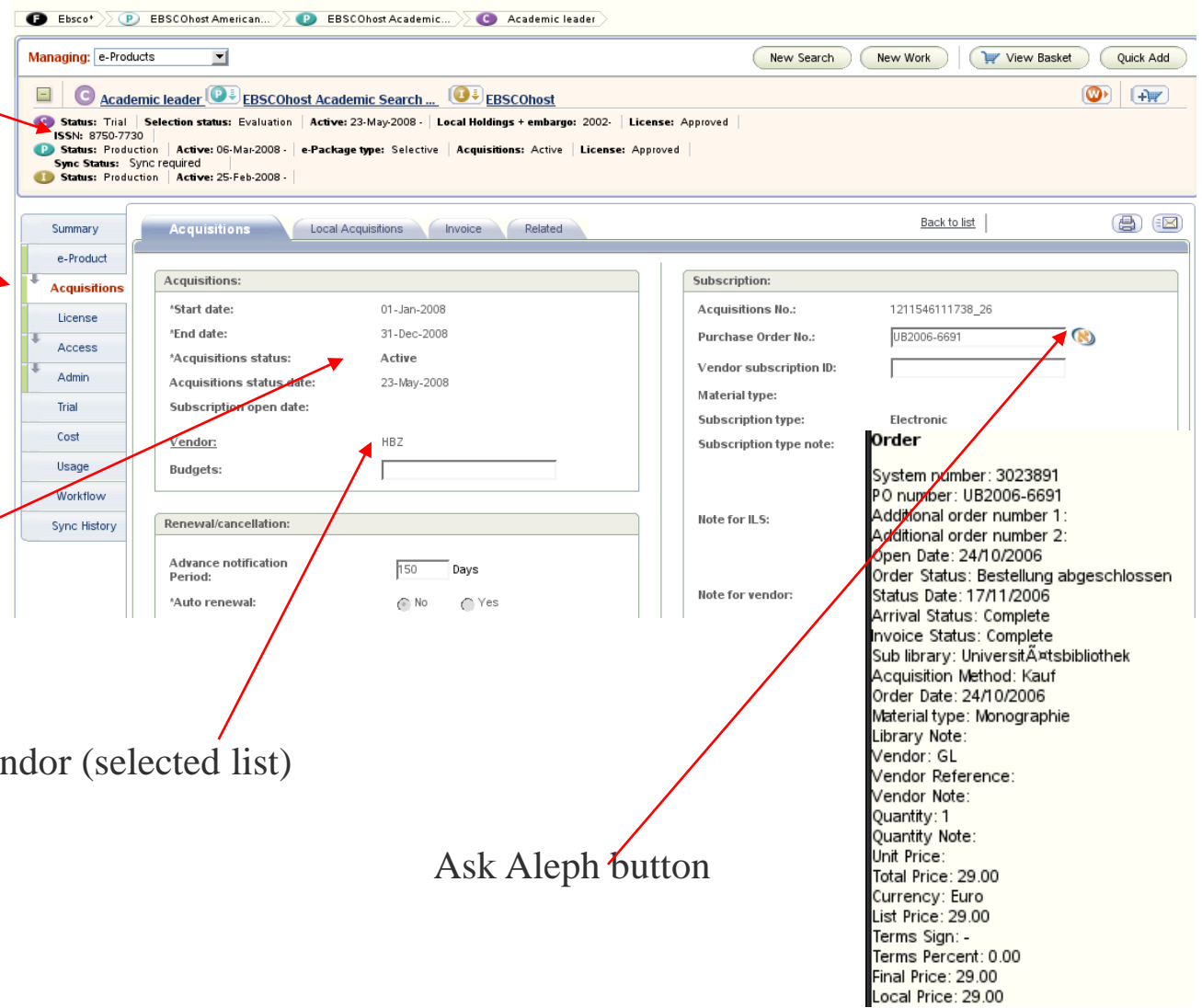
Overview

Inherent information or overwriting

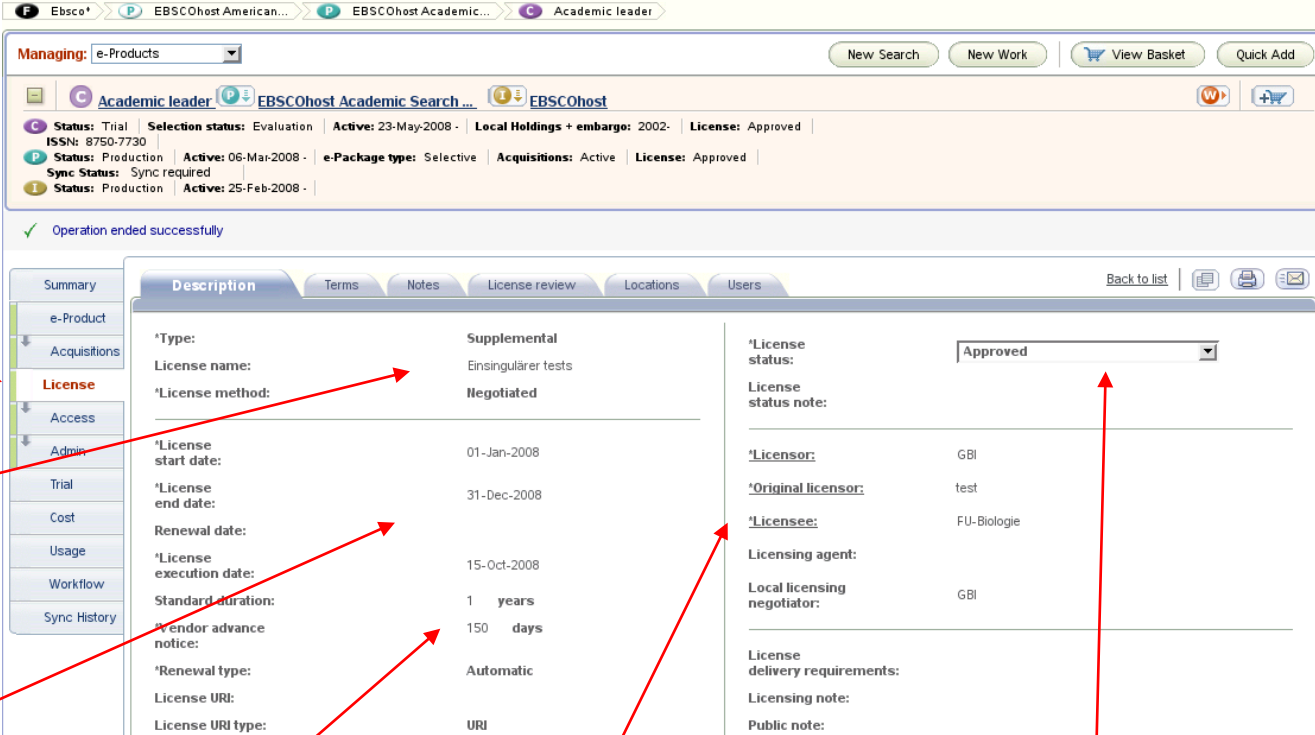
Licence status: 'active' status prevents information being changed

Vendor (selected list)

Ask Aleph button



The screenshot shows the Aleph acquisition record interface. At the top, there are navigation tabs for 'Academic leader', 'EBSCOhost Academic Search...', and 'EBSCOhost'. Below this, a summary of the record is displayed, including status (Trial, Production), selection status (Evaluation), active dates (23-May-2008, 06-Mar-2008, 25-Feb-2008), local holdings, embargo (2002), and license (Approved). The main content area is divided into several sections: 'Acquisitions' (with sub-tabs for Local Acquisitions, Invoice, and Related), 'Subscription', and 'Order'. The 'Acquisitions' section shows fields for start/end dates, status (Active), acquisition status date, subscription open date, vendor (HBZ), and budgets. The 'Subscription' section shows acquisition and purchase order numbers, vendor subscription ID, material type (Electronic), and subscription type. The 'Order' section is highlighted in yellow and contains detailed order information: System number: 3023891, PO number: UB2006-6691, additional order numbers, open date (24/10/2006), order status (Bestellung abgeschlossen), status date (17/11/2006), arrival status (Complete), invoice status (Complete), sub library (Universitätsbibliothek), acquisition method (Kauf), order date (24/10/2006), material type (Monographie), library note, vendor (GL), vendor reference, vendor note, quantity (1), unit price, total price (29.00), currency (Euro), list price (29.00), terms sign (-), terms percent (0.00), final price (29.00), and local price (29.00). A red arrow points to a button next to the purchase order number, labeled 'Ask Aleph button'.



The screenshot shows the EBSCOhost Academic Search interface. The top navigation bar includes 'Managing: e-Products', 'New Search', 'New Work', 'View Basket', and 'Quick Add'. The main content area displays the license record for 'Einsingularer tests'. The record includes the following details:

Field	Value
*Type:	Supplemental
License name:	Einsingularer tests
*License method:	Negotiated
*License start date:	01-Jan-2008
*License end date:	31-Dec-2008
Renewal date:	15-Oct-2008
*License execution date:	15-Oct-2008
Standard duration:	1 years
Vendor advance notice:	150 days
*Renewal type:	Automatic
License URI:	
License URI type:	URI

On the right side of the record, there is a 'License status' dropdown menu set to 'Approved'. Below this, the following information is displayed:

Field	Value
*Licensor:	GBI
*Original licensor:	test
*Licensee:	FU-Biologie
Licensing agent:	
Local licensing negotiator:	GBI

The interface also shows a 'Summary' sidebar on the left with options like 'e-Product', 'Acquisitions', 'License', 'Access', 'Admin', 'Trial', 'Cost', 'Usage', 'Workflow', and 'Sync History'. A 'Description' tab is active, and other tabs include 'Terms', 'Notes', 'License review', 'Locations', and 'Users'. A 'Back to list' link and icons for print and email are also visible.

Overwrite inherent information

License status

License period

Notification of renewal

License vendor

Status generate notification, no action possible

Screenshot SFX

Available: 2 targets
 Database: sfxub3
 Filter Target List:

• GERMAN NATIONAL LICENSES to SPRINGER LINK

#	Target	Threshold	Modified	Active	Action
1	GERMAN_NATIONAL_LICENSES (11/13)				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_APS_DIGITAL_BACKFILE_ARCHIVE_GETINFO	S P	2009/12/01	N *	<input type="button" value="C"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_BRILL_MARTINUS_NIJHOFF_EBOOKS_COLLECTION	S P	2010/10/06	N *	<input type="button" value="C"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_CAMBRIDGE_UNIVERSITY_PRESS_JOURNALS_ARCHIVE	S P	2010/03/31	N *	<input type="button" value="C"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_CENTRAL_EASTE				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_HIGHWIRE_PRES				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_KLUWER_LAW_IN				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_NATURE_ARCHIV				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_PROQUEST_HIST				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_SPRINGER_LINK				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_SPRINGER_LINK				
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> GNL_THIEME_CONNEC				

Available: 466 portfolios
 Database: sfxub3
 [\[Back to Target\]](#)
[\[Back to List of Services\]](#)

#	Target	Service Object	Title	Threshold	Mod.	Act.	Actions
1	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026082	Estétikai Szemle	\$obj->parsedDate()>=1,1935,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
2	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026083	Изкуство и критика...	\$obj->parsedDate()>=1,1939,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
3	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026115	Правозащитник	\$obj->parsedDate()>=1,2000,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
4	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026123	Early Warning Rep...	\$obj->parsedDate()>=1,2001,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
5	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026139	Kolaps	\$obj->parsedDate()>=1,2002,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
6	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026142	Derekh Judaica Ur...	\$obj->parsedDate()>=1,2002,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
7	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026148	ARThoc	\$obj->parsedDate()>=1,2002,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>
8	GNL_CENTRAL_EASTERN_EUROPEAN_ONLINE_LIBRARY	getFullTxt	1000000000026155	Balkan Reconstruc...	\$obj->parsedDate()>=1,2003,undef,unde...	2010/10/14	N * C <input type="button" value="🔄"/>

Summary:

E-media as an integral part of the information service

- **Clear goal:**
How to catch our user for our e-media?
- **Our strategy:**
 - Proper workflow
 - Training and teaching of all staff in tools (programs) and workflows
 - SFX(+MetaLib for data bases) as the central e-resource instance at the FU
 - Systems for administration are Aleph (bill and payment), VERDE(contract), SFX/MetaLib (holdings), Ustat (statistic) and OTRS(incidents)
 - E-media offered via User Interfaces: Primo, OPAC, data bases, MetaLib, bX, other systems (EZB, ZDB, B3Kat, Google) – mainly the OpenURL to SFX
- **Controlling with analysis of statistics**



Thanks to all colleagues in the Acquisition department of the Free University Berlin:

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R. Unger

Ch. Linke

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Questions?