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

Dr. Andreas Sabisch
FU Berlin Universitätsbibliothek

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Outline

• 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
Goals and strategy

- **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
User Interfaces

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

Diagramm zeigt die Verbindungen zwischen verschiedenen Systemen und Diensten, wie:
- Institutional-Holding
- SFX Admin
- Verde
- EZB
- ZDB
- B3Kat
- Aleph-OPAC

Zwischen diesen Systemen finden Verknüpfungen statt, beispielsweise:
- Google-Scholar
- A-Z-Liste Citationlinker
- bX
- Primo-Central
- Primo
- Metalib
- Datenbanken

Die Abbildung zeigt auch den Fluss der Nutzungsanfragen (Nutzeranfrage) durch die Systeme.
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 useful 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 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)
Quality control: usage analyses

SFX Sourcestatistik der FU Berlin

SFX-Volltextnutzung in der FU Berlin

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<thead>
<tr>
<th>Platform</th>
<th>Number of Journals</th>
<th>Total Journal Requests</th>
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<tbody>
<tr>
<td>ACS Publications</td>
<td>48</td>
<td>66,686</td>
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<tr>
<td>Annual Reviews</td>
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<td>12,112</td>
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<td>ACM Digital Library</td>
<td>92</td>
<td>2,059</td>
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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-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
e-product record: general object information

Bread crumb tail for orientation

Short information

Option menu

Breakdown of information with tabs and subsections

e-Package type

Status and period of validation

Coverage (global) and holding (local)

SFX synchronisation button
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
License record

Overwrite inherent information

License status

License period

Notification of renewal

License vendor

Status generate notification, no action possible
### Screenshot SFX

**Available:** 2 targets  
**Database:** sfxfuo3  
**Filter Target List:** German

#### GERMAN NATIONAL LICENSES to SPRINGER_LINK

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</table>

**Available:** 466 portfolios  
**Database:** sfxfuo3  
[Back to Target]  
[Back to List of Services]
Nutzernamen sind imScreenshot ausgeradet

Sehr geehrte Frau.

Ja, die Zeitschrift gibt es nur in gedruckter Form, nicht online. Infos zurFernleihe unter
http://www.ub.fu-berlin.de/bibliothek/benutzung/fernleihe/

> @fu-berlin.de schrieb:

> >
> > ** User Comments **
> > Guten Tag,
> >
> > Kann ich diesen Artikel per Fernleihe bestellen?
> > Vielen Dank.
> >
> > Herzliche Gruße,
> >
> > ** Metadata **
> > Author: Korczak, D, Dieter
> > Article Title: Erfolgreiche Strategien der Uberschuldungspravention
> > Journal: Pro Jugend
> > Issue: Tab.
> > Year: 2010
> > Pages: 4-9
> > ISSN: 0949-0647
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

And to you for listening ;-)