



From Spreadsheets to Systems:

Acquiring New E-resources at MTSU

James E. Walker Library

- Departments
 - Collection Development Management (CDM)
 - User Services
- Information Resources Group (IRG)
 - Members from both Departments
 - Collection Development Decisions
 - Focus on E-Resources
- Liaison Librarians
 - Collection Development Decisions
 - Print Approval Plans, Firms & E-Resources

Collection Development & Management

- Acquisitions Unit
 - Firm Orders
 - Approval Plan
 - Books & Media
- Continuing Resources Unit
 - Continuing Costs
 - Serials, Standing Orders, Databases
 - Licensing
 - ERMS
- Administrative Accountant
 - University AP & Procurement

Early stages of e-resource lifecycle

- Request
- Decision
- Order
- Discovery & Access

Early stages of e-resource lifecycle

Request

- Pricing
- Trial Access

Decision

- Record Decision

Order

- Initiated with vendor, paperwork obtained
- Order submitted with procurement & contracts
- Paperwork approved/signed
- Payment

Discovery & Access

- Activation & Testing
- EZproxy
- Access for patrons

Not necessarily linear

Request

- Trial Access
- Pricing

Decision

- Record Decision

Order

- Initiated with vendor, paperwork obtained
- Order submitted with procurement & contracts
- Paperwork approved/signed
- Payment

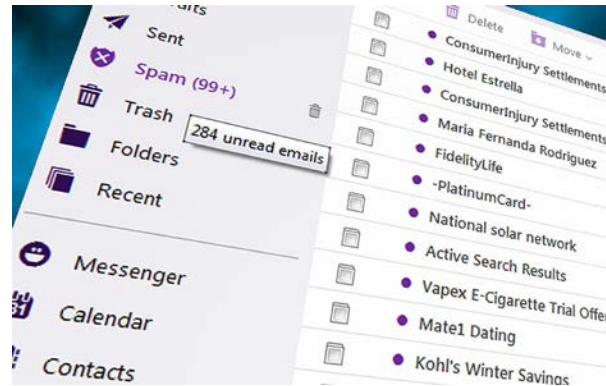
Discovery & Access

- Activation & Testing
- EZproxy
- Access for patrons



Keeping Track (or not)

- Emails



- Spreadsheets

- Documents on shared drive
- Version control

- Individual Memory

- White Board



Not quite the answer



Tools

- SciQuest - Web-based Procurement System
 - MT\$OURCE
- ERMS - SS Resource Manager
 - Ramone
- Web Form - JotForm
 - IRG Request Form

IRG Request Form

- Legitimizes the Request
- Initiates the Workflow
- Gets resource on the “wish list”
- Keeps people in the loop

85.	Sweet & Sour Pork	Pt.	Qt.
86.	Sweet & Sour Shrimp	3.95	7.25
87.	Sweet & Sour Chicken	4.50	8.25
		3.95	7.25
VEGETABLE			
(w. White Rice)			
88.	Plain Broccoli	Order	
89.☒	Broccoli w. Garlic Sauce	5.75	
90.	Mixed Vegetables	5.75	
91.☒	Ma Po To Fu (w. Pork)	5.75	
		5.75	
SPECIAL DIET MENU			
No Salt, Oil or Corn Starch.			
Steamed w. Rice & Sauce on Side.			
S1.	Chicken w. Mixed Vegetables	7.25	
S2.	Shrimp w. Mixed Vegetables	8.25	
S3.	Vegetable Delight (w. Tofu)	6.95	
MOO SHU			
(w. 5 Pancakes & Steamed Rice)			
92.	Moo Shu Vegetables	6.25	Order
93.	Moo Shu Shrimp or Beef	7.50	
94.	Moo Shu Pork or Chicken	7.00	
EGG FOO YOUNG			
(w. White Rice)			
Order			


IRG Request Form

5 Required Fields

- Date
- Requestor's Name
- Resource Name
- Brief description/justification
- Vendor

➤ Sent to all members of IRG

IRG Request Form

Date of Request * - - 
Month Day Year

Name of Librarian/Liaison *
First Name Last Name

Name of Resource *

Brief product description and justification *

Name of Vendor *

Product URL, if known

Total cost estimate and terms, if known

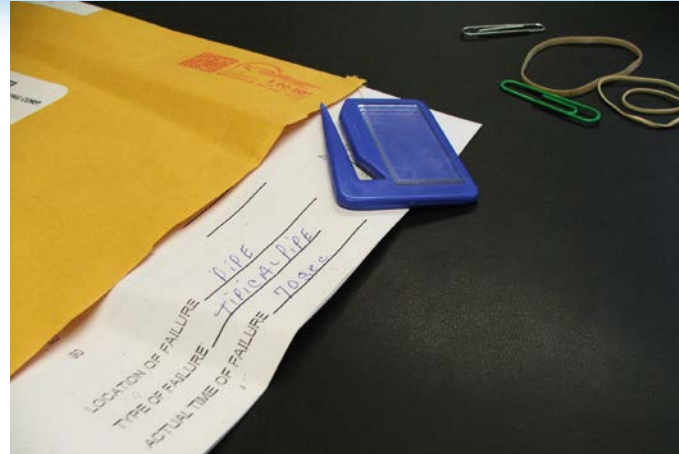
Is cost one-time or ongoing? (if known)

Do you know of any discounts or consortial purchases?

MT\$ource

End routing of paper files

Enables electronic approvals and tracking



Ramone

- Easily accessible place (shared space) to store information
 - and keep it up-to-date!
- Simultaneous access
- Alerts
 - Automate communication
 - Trigger actions through automated alerts



Ramone

Improved communication
thru customized status terms



*Wish List

*Trial wanted

*Trial up

*Trial Over

*Green Light

*Ordering Process Started

*Submitted in MT\$ource

*Accessibility Confirmed

Newly Acquired

Ramone

Email alerts triggered by status code



Custom Status Alert: "*Statista" has changed to "*Accessibility Confirmed".

Nan Matson [nan.matson@mtsu.edu]



To: Beverly Geckle

Thursday, May 28, 2015 2:35 PM


Serials Solutions Alert

Alert Name: Accessibility Confirmed

Alert Type: Custom

This is an alert to notify you that "*Statista" has changed to a status of "*Accessibility Confirmed".

Access is working for this resource. Please verify ezproxy. Ask Nan for url.



Ramone

Email alerts triggered by status code

Custom Status Alert: "DRAM (Database of Recorded American Music)" has changed to "Newly Acquired".

Beverly Geckle [bgeckle@mtsu.edu]



To: Beverly Geckle




























Thursday, June 11, 2015 10:29 AM

Serials Solutions Alert
Alert Name: Newly Acquired
Alert Type: Custom

This is an alert to notify you that "DRAM (Database of Recorded American Music)" has changed to a status of "Newly Acquired".

TONI WILL ADD THIS NEW RESOURCE TO DBS A-Z.

Local List

Database Name		Code	Status	Titles		Provider
*Academic Search Complete		AARJH	*Wish List	0		Library Specific Holdings
*CisionPoint		ABTMI	*Wish List	0		Library Specific Holdings
*CQ researcher plus archive		ABGHZ	*Wish List	0		Library Specific Holdings
*Criterion Collection		ACFTP	*Wish List	0		Library Specific Holdings
*Dance in Video: Volume II		AMSDN	*Wish List	0		Library Specific Holdings
*eMarketer		AAROT	*Trial up	0		Library Specific Holdings
*eSTATEMENT STUDIES		AAFUY	*Wish List	0		Library Specific Holdings
*Flow		ABHWL	*Wish List	0		Library Specific Holdings
*Harper's Bazaar Archive		AIPTL	*Wish List	0		Library Specific Holdings
*Historical Statistical Abstract of the United States		AABKN	*Submitted in MT\$ource	0		Library Specific Holdings
*JSTOR Arts & Sciences 14		AASQL	*Submitted in MT\$ource	0		Library Specific Holdings
*LLBA Linguistics and Language Behavior Abstracts		AADFT	*Wish List	0		Library Specific Holdings
*LLMC Digital		ACZPS	*Wish List	0		Library Specific Holdings
*MarketResearch.com		O1-	*Wish List	0		Library Specific Holdings
*Intel		O1.	*Wish List	0		Library Specific Holdings
*Music Index with Full Text		AAPKZ	*Wish List	0		Library Specific Holdings

Record Keeping

*Not Acquiring - Negative IRG decision

*Not Acquiring - Negative IRG decision

Filter By: Title Begins With ▾

1940 U.S. CENSUS METADATA

American Slavery Collection 1820

ATLA religion database with ATLA

CAB ABSTRACTS 1990-present

Congressional Hearings Digital (1

CQ Almanac 2011-2014

CQ Press Electronic Library

Early European Books

Ebrary subject set

Encyclopedia of Social Work Onli

fold2.com

Title Met on Demand

Collection Name *IRG lists

Provider Library Specific Holdings

Database *Not Acquiring - Negative IRG decision

Type Journal

ISSN

Publisher

Status *Not Ordered

Defaults for Holding

Start Date	End Date
---------------	-------------

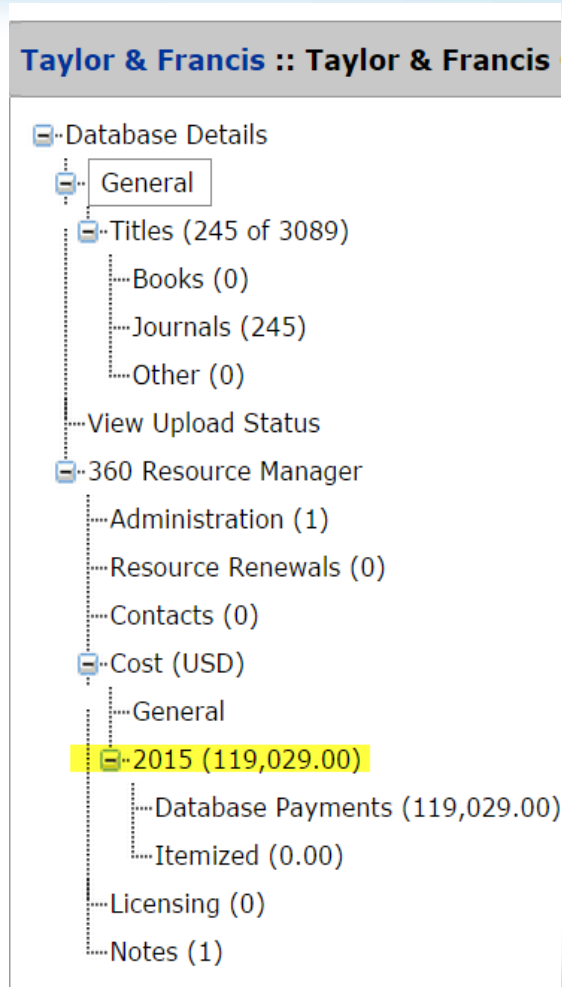
URL

Public Note Tried to acquire but vendor would not meet contract office's requirements.

☐ Display

Additional information

- Recently figured how to upload cost data from our ILS.
- Provides quick snapshot of the resource.
- Hope to use it to help identify renewals that may have fallen through the cracks.



Gaining Control



The Seemingly Endless Challenge: Workflows
by Lisa Mackinder

Workflows

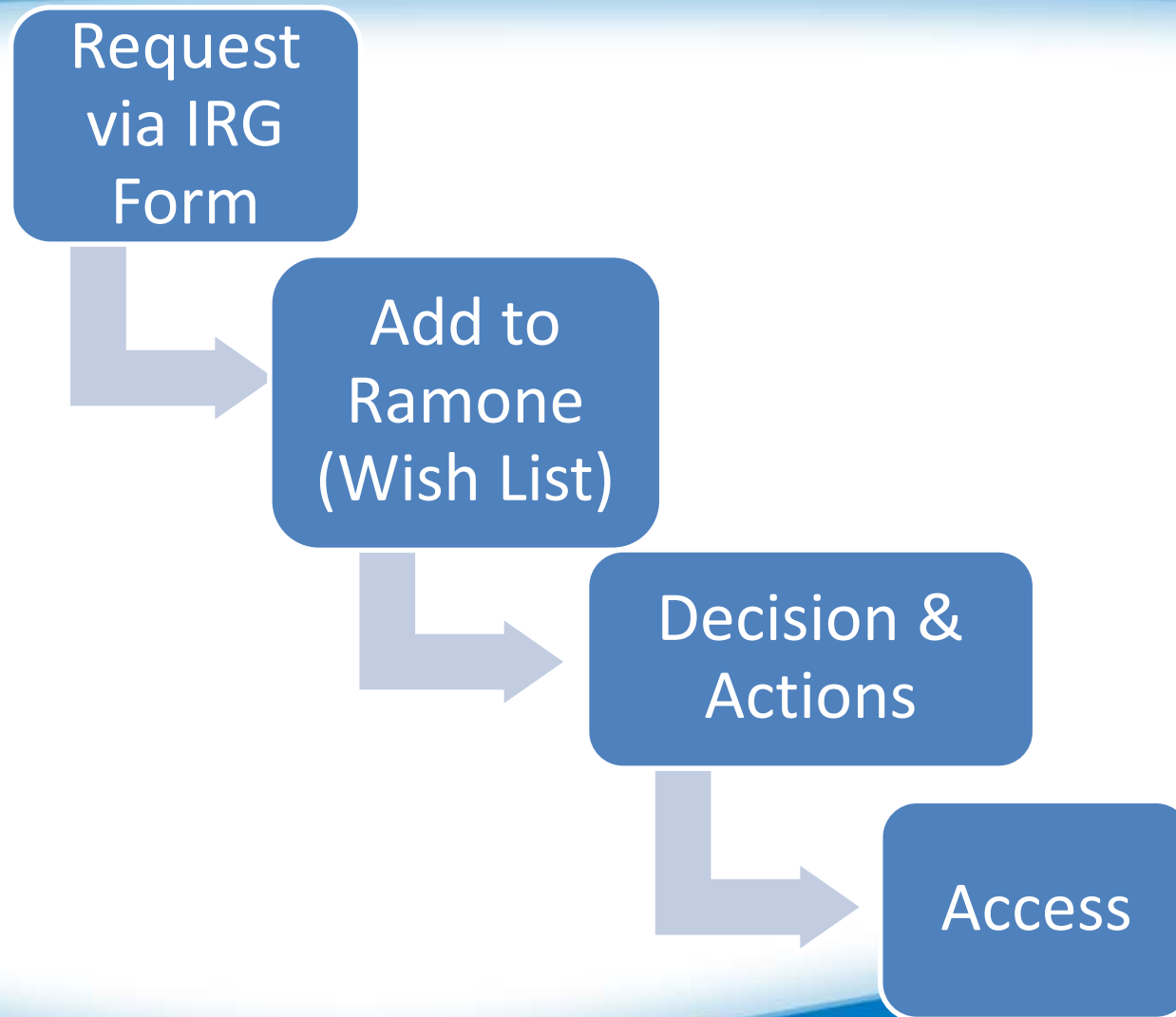
“can be seen as the set of overarching directives that allow staff to manage a process.”

Procedures

“are often determined by the systems in place and can include precise system-based directions”

Lisa Mackinder (2014) *The Seemingly Endless Challenge: Workflows*, *The Serials Librarian: From the Printed Page to the Digital Age*, 67:2, 158-165

Walker Library Workflow



Challenges



Follow the Workflow



Comfortable with ERMS

Final Thoughts

- Identify your local needs/challenges
- Maximum benefit comes when you determine how to leverage the tools to meet local needs or solve local challenges
- Commitment

Questions?

Beverly J. Geckle
Continuing Resources Librarian
Middle Tennessee State University
615-904-8519
beverly.geckle@mtsu.edu