



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

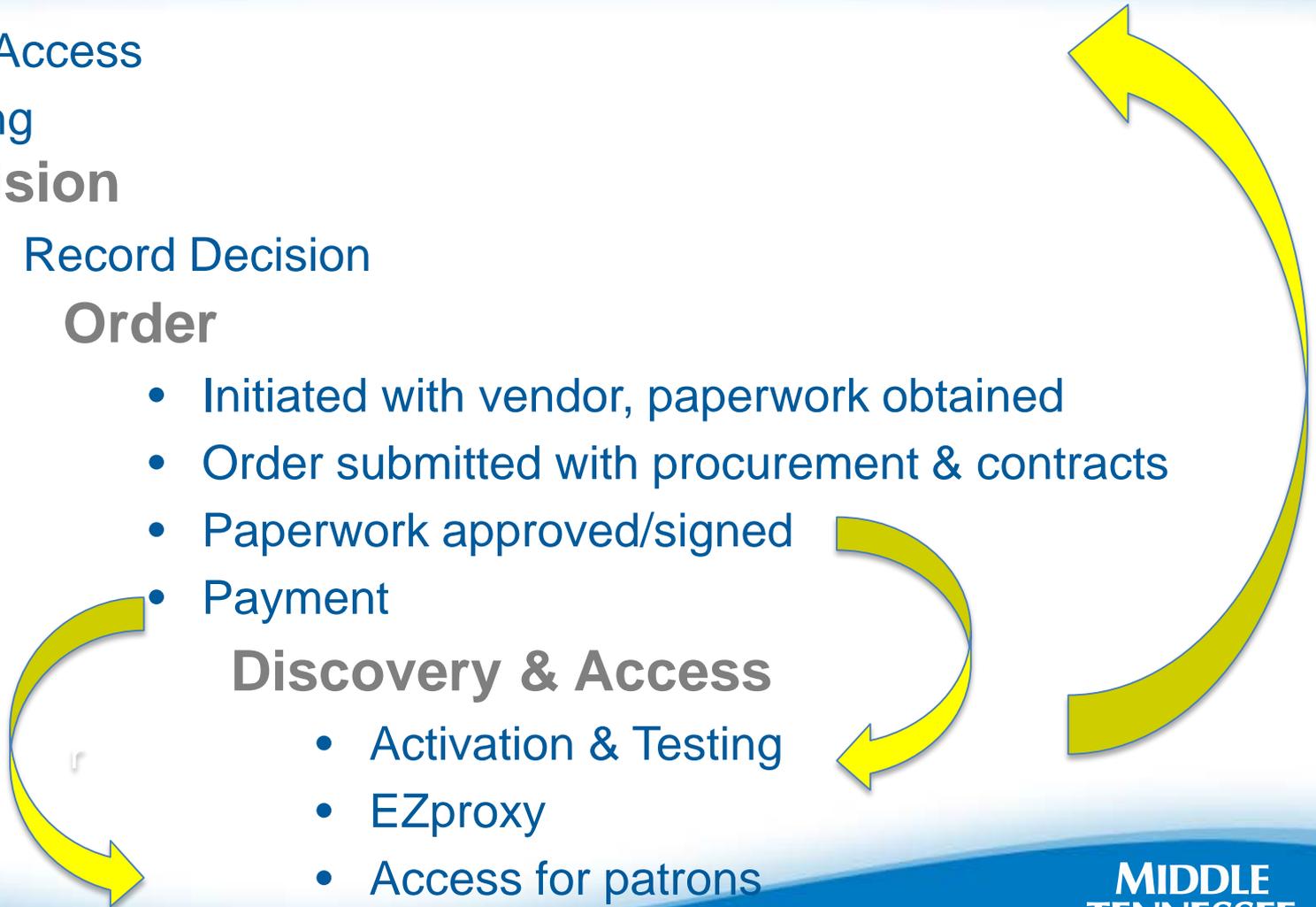
- Record Decision

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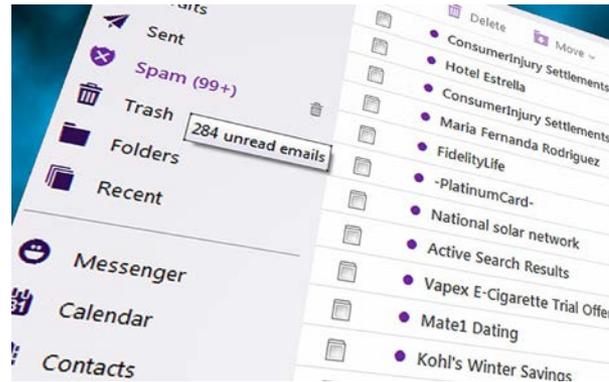
Discovery & Access

- 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		
86.	Sweet & Sour Shrimp	Pt.	Qt.
87.	Sweet & Sour Chicken	3.95	7.25
		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)			
			Order
92.	Moo Shu Vegetables		6.25
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

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?

5 Required Fields

- Date
 - Requestor's Name
 - Resource Name
 - Brief description/justification
 - Vendor
- Sent to all members of IRG

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 1820-1865
- ATLA religion database with ATLAS
- CAB ABSTRACTS 1990-present
- Congressional Hearings Digital (1950-2014)
- CQ Almanac 2011-2014
- CQ Press Electronic Library
- Early European Books
- Ebrary subject set
- Encyclopedia of Social Work Online
- fold3.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		URL
Start Date	End Date	

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.

Taylor & Francis :: Taylor & Francis

The screenshot displays a hierarchical tree view of database details. The root node is 'Database Details', which is expanded to show 'General'. Under 'General', there are several sub-nodes: 'Titles (245 of 3089)', '360 Resource Manager', 'Cost (USD)', and 'Notes (1)'. The 'Titles' node is further expanded to show 'Books (0)', 'Journals (245)', and 'Other (0)'. The '360 Resource Manager' node is expanded to show 'Administration (1)', 'Resource Renewals (0)', and 'Contacts (0)'. The 'Cost (USD)' node is expanded to show 'General', '2015 (119,029.00)', 'Database Payments (119,029.00)', 'Itemized (0.00)', and 'Licensing (0)'. The '2015 (119,029.00)' node is highlighted in yellow.

- Database Details
 - General
 - Titles (245 of 3089)
 - Books (0)
 - Journals (245)
 - Other (0)
 - View Upload Status
 - 360 Resource Manager
 - Administration (1)
 - Resource Renewals (0)
 - Contacts (0)
 - Cost (USD)
 - General
 - 2015 (119,029.00)**
 - Database Payments (119,029.00)
 - Itemized (0.00)
 - Licensing (0)
 - Notes (1)

Gaining Control



The Seemingly Endless Challenge: Workflows
by Lisa Mackinder

Workflows

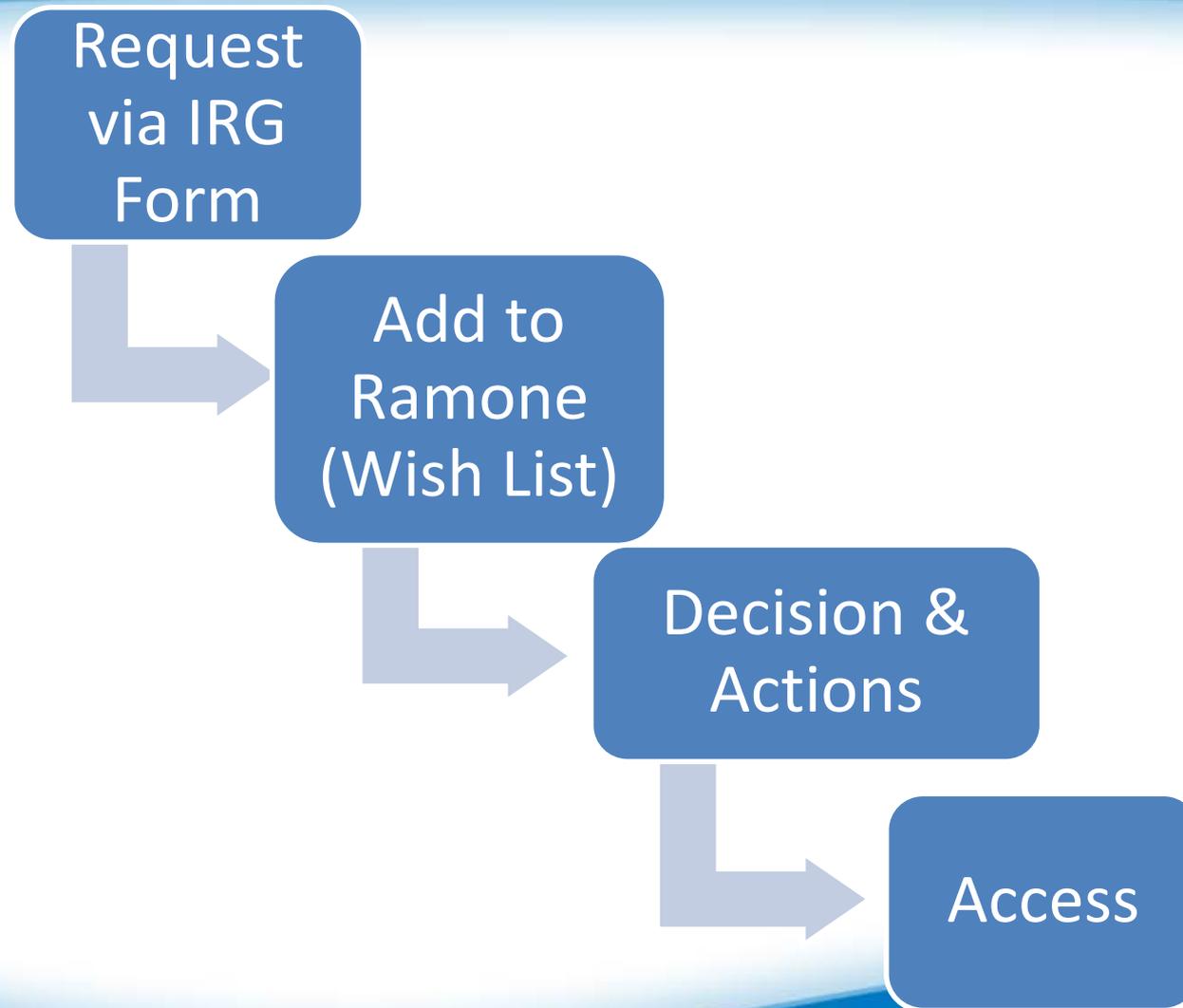
“can be seen as the set of overarching directives that allow staff to manage a process.”

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?

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