

Going Green – Verde preparation and planting V2

- Purpose** This document supports the poster presentation given at IGeLU Madrid 2008. The poster is a summary of what we knew from the start was not really a technical project, but a change project facilitated by technology.
- Background** Since 2003 the University of Plymouth has been increasing the number of electronic resources (either via subscription or one-off payment) with a collection policy that states e-only is the purchase route unless stipulated for academic purposes by an academic. At first this was a small number and managed via spreadsheets and memory. As the numbers of titles increased and the perceived complicated nature of administrating these titles grow staff and users were getting frustrated. In Sept 2007 we went live with SFX, and that removed some of the concerns, but brought new ones. Things needed to change.
- 2 areas of learning** What became very apparent was that to make this change we would have to understand two things. 1) what we needed from a system – and once implemented learn its individualistic approach. 2) What our culture is around acquisition of this type of material; and in a wider context – what is the attitude to what some may perceive as radical change.
- Technology lessons** Taking the easy one first, getting from the position in 2006 to where we are now, a very concentrated period for what we have achieved, has taken a lot of hard work and input by a number of people. And as with all projects started with identifying the problem.
- Use the LMS?** We had been approached by Endeavor (Voyager's owners at the time) to purchase Meridian, their ERM, we looked at it, and liked many of the features, but the cost was far too prohibitive for us. So, our next thought was to push Voyager to take on function. After all it is supposed to be the Library materials management system. In Sept 2006 we decided to review the MARC and Acquisitions records to agree procedures that would allow the important information to be recorded. After a year staff were informing us that this solution was not working.

Going Green – Verde preparation and planting (cont.)

Business processes

What the management team were also concerned about was the possibility that there would be over-complexity built into the system if we just did with e-resources what we have always done when acquiring and managing subscription materials. And so a series of business process reviews were undertaken. Sessions were held with all the staff dealing with any element of managing the products and each stage and decision point was noted. It was important to see what steps were being taken, what the staff felt were essential elements and who was involved and how.

Ideal workflow

From that we were able to draw together what we thought might be the ideal approach for managing this type of material for University of Plymouth.

When you can't provide the ideal situation

The "ideal" workflow did suggest a very different approach, one that would impact directly on the existing staff in the acquisitions area and also on the relationship between our subject librarians (who make selections, have the budget and train the users) and the team of acquisitions and maintenance. At the time a new post, at a mid-level grade was identified to take on much of the negotiation and management of e-resources; but that post would pull from the responsibilities of three existing teams. And there was no real appetite for this "radical change". But a new post in the acquisitions area was created 2 or 3 grades lower than the proposed post, not just to manage the acquisition of e-journals, databases or e-books, but in theory to help deal with all electronic resource elements of managing the collection (so importing MARC records and exporting authority records to keep the Voyager database up to date).

Better understanding

The work was not a waste of time. In fact from that we had an extremely good idea of what was actually going on, and were able to patch some things – mainly in the transfer of information from the subject librarians to the administration unit. We also knew what we needed from a system.

Review of Voyager and emergence of Verde

All of this work meant that we were able to review the use of Voyager as the ERM system in the late spring of 2007 and found that the staff believed it was causing more problems than their spreadsheets that they used to manage these products before. At that stage we seriously started contemplating Verde as a solution. We knew what functionality we needed, and the price was much more attractive than the Endeavor product.

Going Green – Verde preparation and planting (cont.)

Get prepared One of the first things that Ex Libris told us was to put work into the preparation of the data migration. And they have not given any advice more welcome or helpful. ***YOU NEED TO DO THIS.***

Despite having organised our material in a very structured way the previous year (after all we revisited all titles and procedures to put the material on Voyager) there was a lot of work to be done. And some unexpected problems.

Know what you have bought This sounds so easy! You must know what you have bought, after all you have placed an order and the material has been supplied – but what we have found is that the “name” of the product seems to change for different sectors/audiences and that the same product is referred to by more than one name by the supplier. We thought we knew what we bought, but found it almost impossible to find them on the Verde Knowledge Base. The “good news” was that this did not come as a complete shock as we had faced the issue with SFX, but it is even worse in Verde because of the increased types of material being recorded in that Knowledge Base, things that we would never have put not our “e-journals A-Z” which is how we think of SFX.

Even worse, when you ask the supplier the real name of the package/standalone you don’t get helpful answers. Our subject librarians are still struggling, a year on, with the idea of finding the definitive title at an early stage.

Don’t duplicate We made a decision at Plymouth that data should not be duplicated where at all possible and that systems would cross-refer to each other. As Verde has no real financing reporting, or approved finance system accreditation, all orders and budget information is held in Voyager. One real disappointment has been the lack of progress in getting the Verde/Voyager look-up working. With that no being active we have given some staff an “excuse” of not using Verde to answer enquiries or solve problems.

System teething problems Potential new users of Verde have to be aware of a few things which we found after we implemented Verde:-

- Many of the automated alerts don’t work
- You cannot change the default workflows and that can limit the customisation to your area

- Reporting is not that easy for some items

On the positive side, Ex Libris are interested in hearing what we want.

Going Green – Verde preparation and planting (cont.)

Learning about ourselves

As indicated at the start of the paper, the implementation of Verde has actually been a culture change project. And during the process we have learnt a lot about our team members, our procedures and our attitudes.

Perception that e-resources are "difficult"

This is a change that is not just needed at Plymouth, but in the sector. It appears that as a profession the management and maintenance of e-resources is thought to be extremely difficult and very complex. Much more complex than anything else we have to deal with.

Is that the case or is it simply different? Yes there is a different terminology, and Verde does bring in some strange terms (often different from its sister service SFX which does not help). But once you have "got" the terminology how hard is it to:-

- Select a product from a database
- Create a product from scratch
- Add acquisition details (enough to cross-reference)
- Ensure that admin information is stored in a single place

It is what we do every-day, so why do people think it is so different; and so much harder? One interesting snippet; our IT helpdesk expect their people to use Verde to solve problems while our library staff say it is too hard. What is the underlying problem that we need to address? We are still trying to get to the root of this one.

Staff training

This is very much tied into perceptions. As we see it there are a number of strings to the development of staff to use Verde:-

- Understand the 3 layers. For some reason getting the Verde hierarchy across to staff seems one of the biggest hurdles.
- Training staff on how to search Verde. We are expecting our front-line staff and subject librarians to be able to check Verde and then if the problem needs to be escalated to pass that on. But it should be easy for any member of the Library staff to search for and find local holdings of e-materials.
- Training staff on creating new items – for some reason Quick Add seems to take a bit for people to "get". A more understandable element is linking existing works to "new" packages.
- Using the workflows. The hardest thing here is getting staff not

to anticipate or work outside what the system has told them to do. Perversely it is actually easier to train new staff to do this than those who have been using Verde for a longer period.

Going Green – Verde preparation and planting (cont.)

Balance between “getting” the material and managing it properly

Another area that seems to be taking a lot more effort than anticipated (and the hangover is still there after 10 months) is trying to find the right balance between the desire of the subject librarians to push orders through and then thinking about the acquisition and longer-term management issues. One of the main features in Verde is the ability to follow sensible workflows that take you through each step of the process. But it relies on Verde “starting” as soon as a purchase is even considered. We still have a situation where the subject librarians want to get the “deal” wrapped up and then hand over what they think our e-resources officer needs, of course that is where we find many gaps and a lot of work has to be done to fill holes that could have been sorted slightly easier if payment had not already been made. We now have a proforma order form that we ask subject librarians to complete, but again as far as Verde is concerned this is sent too late to our order team. A real culture change is needed for this seemingly small element.

Licensing

Even once you have identified what you have bought it is important to understand the terms and conditions of use. This was an area where University of Plymouth has had to change. As we said we have really only been purchasing a number of e-resources for 3-4 years and the idea that subject librarians should take responsibility for negotiating and questioning licence terms was foreign. These were signed by a senior manager and the terms were not actually cascaded down to the front-line staff or the users themselves. As the number of titles has increased we have had a major effort in trying to get the subject librarians to take this responsibility. And at the moment there is a decision that a single senior subject librarian is responsible for this – again divorcing the person who selected the content from the knowledge of how it can be used. There are some at the University who believe that this change has to be taken further.

Staffing crisis

The introduction and pushed implementation of Verde has coincided with a number of staff sickness issues within the acquisitions team; one of them being the e-resources officer. We are currently revisiting the structure of the team with a thought that more staff will have to take responsibility for e-resources. With the current perceptions in the team however it may not be so easy.

Going Green – Verde preparation and planting (cont.)

Looking forward

This paper has been put together as a tool to help people spot potential problems with their local implementation and so seems to deal more with the negatives. But it is important to say that we have achieved a lot of culture change already revolving around Verde as the change mechanism, and on the whole the Verde implementation has been a success. We have been able to revisit not just how we deal with e-resources, but also look at how we manage the suppliers of the materials.

We are also pushing the envelope with what we expect Verde to manage. One of the frustrations at Plymouth has been the narrow definition of e-resources. The “traditional view is that these are databases e-journals and e-books; but we argue that an e-resource is any content or system that using technology to provide a service. And so our Verde implementation has details of our support contracts with Ex Libris and other library suppliers, it lists our maintenance contracts for the Library servers and is being looked at by our technical colleagues to see if it is the place to manage information on site-licensed software and other system contracts.

The role of Verde (and consequently the Library) in assisting the understanding and management of our support systems is offering our University benefits beyond knowing what e-journals we subscribe to.

Top tips on implementation

- Think what you are trying to achieve. Where are your knowledge gaps? What are you trying to achieve?
 - Know what your materials are. And what they have been reported to Ex Libris as.
 - Work-out how your internal processes would fit with the DLF acquisitions and licence workflows (these underpin Verde) and if changes in your structure/procedures are needed be prepared.
 - Have a good knowledge of what information goes where (at Plymouth we maintain a Wiki for this information).
 - Get the message that Verde is different, not no more complex than your LMS.
 - Put time aside to train staff on Verde terminology.
 - Don't be put off – Verde can offer a number of additional benefits - - - if you have the vision to look for the possibilities.
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