

24TH ANNUAL UKSG CONFERENCE

Workshop Reports

Nine workshops were held at this year's conference, each repeated three times, generating much interesting debate and discussion. Reports reflecting the content and discussion at some of these workshops are included below.

The end user, the librarian and e-commerce: living in perfect harmony?

Leader: Liz McNaughton, RoweCom (UK)

Outline text published beforehand: This workshop explores the differences between centralised & de-centralised purchasing models & how both can coexist within an organisation. What part does e-commerce play both now & in the future? And what role does the librarian have in establishing the most appropriate model & environment for their own institution?

Summary from workshop sessions: The general feeling was that there were many strengths within a centralised purchasing function such as economies of scale, avoiding duplicate purchases, more control and awareness of the 'big' picture, together with expert services that a librarian can provide to the end-user. Where end-users purchase their own material in a de-centralised environment, purchasing can be faster and more responsive to an immediate need. However, the loss of overall control was seen as being potentially detrimental to the organisation as a whole.

E-commerce does not appear to be being used extensively within organisations currently, although electronic services are being developed and promoted by librarians amongst their user community, and this is likely to continue. Pay-per-view is seen as a complementary option to subscriptions, but is not widely used yet due to administration constraints and practices. As for the future, the librarian is likely to become more a

facilitator than a provider of information, or to use a travel industry analogy, to graduate from 'waitresses' to 'tour guides'!

E-journal usage statistics

Leader: Roger Brown, GlaxoSmithKline

Attendance was limited to 20 for each of the three workshops. As leader, I felt that 2 of them went well and one less so. The two that went well were attended by a good mix of librarians, intermediaries and publishers. In the less successful one, there were fewer librarians, and some of those were unwilling to join in the discussions. It is that dynamic interaction between the many different players in the information chain that makes the UKSG Conference so useful. When that balance is not right, as in one of these workshops, then there is no debate, no exchange of views, which makes the leader's job a tough one! This following report is an amalgam of the three sessions.

RB firstly set the scene by describing librarians' attempts over time, to capture information on usage of library materials. The literature is scattered, with examples ranging from user surveys, reshelving exercises, 'take it away and see if anyone asks for it', to some quite bizarre ones, e.g. taping volumes shut and later seeing if the tape is broken!. Publishers, being generally one more step removed from readers than librarians, had even less idea what was being used, relying on citation indices and market surveys to demonstrate value.

So the need to have this usage data has always been there and the new technologies now enable us to track, monitor, count and analyse almost every 'click' a user makes but do you really want or need that level of detail? Should you know that level of detail (privacy considerations)?

Some of the benefits of having this data:

a) *Publishers:*

- can see which of their journals get highest use;
- can identify 'hot' papers (and 'hot' authors!);
- can monitor licensed institutions for 'unusual use patterns';
- can use data to formulate new pricing models.

b) *Librarians:*

- can see which of their 'previously subscribed in print' titles are really used;
- can use the data for collection development decisions;
- can demonstrate to their fund holders the real usage of their collections.

In the first session of the conference Bernard Naylor and Martin White both referred to usage stats: Bernard: "E-journal usage data is often reported as higher than expected but did we start with low expectations because of our experience with print usage, where we may well have underestimated use because of the difficulty of measuring it?", and Martin: "The problem is not in collecting the statistics, it is in interpreting them."

Some of the discussion points that followed:

a) Usage can be a combination of things:

- a connection to the journals home page;
- table of contents look-up;
- viewing the abstract;
- downloading the html or pdf version of the full-text;
- search of publishers content.

b) Serious problem is lack of standardisation in terminology. eg what is the difference between a hit, a visit or a session? They can mean different things to different vendors. As a result it is almost impossible for the librarian to combine different vendors' usage reports. (but see "Vendor-based usage statistics working group" on the JISC web site: http://www.jisc.ac.uk/curriss/collab/c6_pub/#uswg)

c) Few libraries are doing very much with the usage reports they are getting, but all agree that they ought to be doing so, and probably will do more in future.

d) Librarians should be wary of accepting usage statistics at face value. Human nature may tempt some vendors to show only the 'good side'.

e) Librarians should ensure that regular usage

metric reporting is written into the EJ licence.

f) Publishers have a problem collecting the total usage of their materials when it can be distributed through many different third parties.

g) If you are looking at the time of usage, remember that it is the time where the server is located that is reported. It may not be where your user is.

h) Frequency of reports:

- some felt quarterly was sufficient;
- some wanted monthly, to reflect trends in use better;
- much depended on resources available to analyse but also need to tie them in with the budget cycle;
- reports are needed ahead of budget decisions;
- agreement that collecting usage stats is just the start of the process, that analysing the data and making sense of it is the next step and then, perhaps even more importantly and even more difficult to assess, is what value is extracted from the information delivered.

E-journals and library management systems

Leader: Steve Oberg, Endeavor Information Systems Inc.

This workshop showed the varied approaches, which librarians have adopted when using library management systems to control e-journals. Most discussion focussed on how e-journal titles should be listed. There was no consensus on whether records should be added to the OPAC, as well as to the library's web pages. The OPAC was generally felt to offer better searching mechanisms than were possible on some simple A-Z listings. Some libraries have systems that take catalogue records for e-journals from aggregators or databases export them into web pages. In other libraries the processes of adding titles to the OPAC and to the web pages are managed separately. Some libraries would choose to add records to the OPAC, as well as to web pages, but do not have sufficient resources to do this. Library systems need to be able to maintain URLs and have automatic authentication for URLs, when the MARC tag is created.

Ways of making clear the bibliographic relationship between print and electronic formats on OPAC were discussed. It was generally felt

that a single record approach is the best option for readers, with existing print records being enhanced with extra notes and holdings statements for the electronic versions.

A few libraries are keeping records of the availability of electronic issues by checking them in on their library management system. Most libraries felt they did not have the resources necessary to do this and rely on readers to let them know that an issue is not available.

Steve Oberg talked about new digital library building tools, which may develop in the future at a higher level than traditional library management systems. These will provide a unified searching tool across web pages and the OPAC will be just one source of data. These tools will provide a framework to link data into a single interface.

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Licensing issues

*Leader: Sally Morris, Association of Learned and
Professional Society Publishers*

This was an extremely useful gathering of publishers, librarians and agents, which looked at current developments in licensing. Actual licences were considered to see what effect model licences are having. Publishers are expecting users to explain why they cannot comply with particular aspects of a licence and agree amendments. It is hoped that publishers will see which areas are causing problems to libraries and adjust their licences. A particular area of

ambiguity remains the definition of a site.

Publishers are relying on trust rather than trying to police the use of e-journals and no examples were given of licences being terminated because of abuses.

The licensing process takes time and adds an extra stage to the work of ordering a resource. Consortia deals may improve the situation for librarians but negotiating deals is very time consuming for publishers and agreements need to be for more than one year. The role of agents in this licensing process was discussed but it seems that librarian and publishers prefer to deal directly with each other on this issue.

Pricing models were discussed. At present these are often based on the amount spent in previous years, plus an amount for the number of users in an institution or the number of students likely to make use of a resource. These models may only be a transitional step as basing costs on what was spent in previous years only perpetuates existing spending models.

The bundling of titles by publishers was considered. Libraries may not be willing to pay an additional amount for titles to which they did not subscribe and which may not be relevant. With limited budgets and with the restrictions on the cancellation of printed titles, they may not be able to take advantage of bundled deals. However, users are welcoming the increased range of journals available to them electronically through these deals

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