REPORTS ON BRIEFING SESSIONS AND WORKSHOPS HELD AT THE 25TH ANNIVERSARY UKSG CONFERENCE

SFX Linking

Jenny Walker, Director of Sales & Marketing, Ex Libris (USA) Inc

SFX for libraries – SFX linking allows libraries to take control of their own linking environments, determining what types of links to offer their users, and how these links should be resolved. SFX linking ensures that library holdings – electronic and print – in which libraries invest so heavily are fully exploited, ensuring users are linked to library resources before, for example, document delivery requests are made, or pay-per-view options are offered.

While the focus on linking to date has been on linking to the full text, libraries are now using the tools at their disposal to provide extended linking services such as links to read a book review, or to check an author's e-mail address. SFX allows libraries easily to incorporate local collections and services into their interlinked environments.

SFX provides a single point of administration for libraries to configure link services that are then available to a range of information resources. In particular, it is important that SFX has knowledge of the library's journal subscriptions. User-friendly web-based and batch-loading SFX tools are provided to optimise this task for libraries – a recent SFX customer was operational with SFX in a production environment within three weeks of training. Once the SFX KnowledgeBase has been localised, this can be used by all SFX sources to generate appropriate links. Once localised, the KnowledgeBase can also be used for other purposes, e.g. to generate journal title lists for the library web pages.

SFX for users – SFX helps users navigate effectively through the library's e-resources without having to re-type and re-enter searches. For document delivery requests, for example, citation data can be transferred to pre-populate the request form.

Further, with SFX, links are presented to users in a consistent manner across information resources and will lead users only to those resources to which the user has access rights and/or those that the library has deemed are relevant. SFX customers report on the intuitive nature of SFX, whereby users click on the SFX button even if there has been little or no training or promotion by the library. SFX statistics provide valuable feedback to library staff on the usage of SFX.

The OpenURL: enabling open linking for libraries – The OpenURL is the mechanism by which information resources communicate with a link server such as SFX. Information providers implement the OpenURL to allow outbound linking from their resources, with linking services themselves then being determined by the library. This is a fundamental shift in linking. By disconnecting the link source from the link target, libraries can take control of their linking environments.

An SFX button represents the OpenURL for an SFX source such as an article citation or library catalogue record for a book, journal or journal issue. When a user clicks on the SFX button, metadata describing the SFX source is transmitted via the OpenURL to the SFX Link Server, which then determines what links to offer to the user via the SFX menu.

The OpenURL is currently on track for NISO endorsement this summer.

SFX and the OpenURL are fully compatible and indeed, complementary to, the DOI/CrossRef linking framework.

SFX@RHUL

Owen Stephens, Systems Librarian, Royal Holloway College, University of London

Royal Holloway is a college of the University of London, and was recently ranked ninth nationally in *The Guardian* University Guide. Royal Holloway was the first site in the UK to 'go live' with the SFX linking product from Ex Libris, in October 2001.

There were three main reasons for Royal Holloway choosing to use SFX. These were: to provide a more seamless experience to our users when they were using abstract and indexing databases and wanted to locate material, whether online or in hard copy; to increase the use of e-journals within the college; and to increase our ability to manage our e-journal collection.

SFX has certainly made the user experience more seamless. The users can now click the SFX button from a record in a database such as Web of Science, and be offered the full-text online, if it is available, or to look for the material in a selection of library catalogues if it isn't available online. This has the interesting effect of changing the workflow for the users, as they can move straight from a reference to finding the location of material, as opposed to the traditional workflow of first making a list of references, then locating each item in turn. This may require a different approach when training users in information retrieval in the future.

It is difficult to draw firm conclusions about the affect that SFX has had so far on the use of e-journals. This is an area where we will need to collect more data before any conclusions can be drawn, and it may never be possible to ascertain a definite link between the SFX implementation and any e-journal usage.

SFX is used to record which e-journals can be accessed by Royal Holloway users, and provides a mechanism to switch on and off access to individual titles and complete portfolios easily. This means that it provides the basics of what could be expected from an e-journal management system. However, the primary function of SFX is to provide a linking mechanism, not manage e-journals, and consequently it does not offer the ability to record subscription, order, payment or licence information that we need to manage our e-journal collection more effectively.

To date the following databases have been enabled as SFX sources:

- Aleph (Royal Holloway's library catalogue)
- EBSCO
  - Business Source Premier
  - EconLit
- Web Of Science (UK via MIMAS)
- OCLC FirstSearch
  - GeoRef
  - RILM
  - MLA
- SwetsNet
- Institute of Physics
- arXiv

Over 25 resources have been enabled as SFX targets including:

- Aleph (Royal Holloway's library catalogue)
- ScienceDirect
- JSTOR
- Highwire e-journals
- COPAC
- SwetsNet
- Project Muse e-journals
- Resource Discovery Network (http://www.rdn.ac.uk)
- Internet Movie Database (http://imdb.com)

Story-telling

Mark Field, Information and Knowledge Management Adviser, CILIP

We are all story-tellers. We take complex histories of events that happen at work or in our private lives, which may involve parallel events, uncertain outcomes, other strands of events that proceed away at a tangent, possibly returning as part of the whole messy process later on, and somehow or other we turn these into cogent and meaningful narratives.

We do this for all sorts of reasons: to make a point about something that is critically important to us at work, to offer an illustration, or an example in a meeting, or to amuse our friends or family; whatever the context, we can all use this very human facility.

And yet, curiously, the proposal that stories can be used to offer truth, insight, or just to share information, is something that many people have difficulty with. I've been telling librarians, and others, about story as a tool, ever since I listened to David Snowden and Victoria Ward each talk about their approaches to story-telling in consulting engagements, about five years ago. Lyndsay Rees-Jones and I have been encouraging people we meet in the knowledge management (KM) workshops that we run to consider how they might use this particular part of the KM toolkit for some time.

However, we rarely focus purely on story-telling: we've learnt how challenging many people find it, and there are many KM tools to choose from.

We were delighted to have the opportunity to devote an hour's session purely to story-telling; although we recognised that we could only introduce the idea in that time: David Snowden's story-telling seminars are at least a day long, and his masterclasses take two to three days, an hour would be barely enough time to get to the point where we might be dealing with the issues people have with the idea of stories as a means of effecting positive change.

And there were issues. Many people's conception of a 'story' is of a fiction – something that is not true – so to use stories in a work setting would therefore be tantamount to lying, or deception. Yet, some of the most potent stories are true: the typically heroic stories of explorers, soldiers, social campaigners or political activists are so powerful because they are true. We may suspect that they might be embroidered or edited, but we believe in their basic truth, and are inspired by them. We even compare different stories to find some lesson that is profound – that we might aspire to emulate. The respective stories of Amundsen, Scott and Shackleton are often contrasted to support very different arguments about leadership, or simply about proper preparation.

But the stories I use are not epic tales of heroism. They are small, they have a point, they convey a message that I want people to understand, and they are true. They change. They change, not through any desire to deceive, but because I use them in different ways. Stories are not in themselves anecdotes, illustrations, examples, or case studies, but they can be used in all of those. A story is one facet of a single episode, or a complex history: using these as a resource, it can, while using factually accurate events, be used to offer a false representation – this more often happens unconsciously than through intention – but using only some of the events or changing their order within the story are not *de facto* attempts to deceive. For example, an explanation of the motives behind someone's actions can be given at the beginning, or at the end, of the story. Given at the beginning, the story is about a journey towards a goal, and the discovery of whatever degree of success or failure we judge the teller to have achieved; this is quite different from offering our motives at the end of the story, when they are a revelation and may cause us to re-examine our recollection of what we have just heard.

For some time now, I have been using one of my first consulting engagements – or maybe I mean freelancing, because it did not begin as consulting in the common understanding of that process – as a story 'resource'.

The way I usually tell it goes like this: I was approached by a surveyor to create a library – organise his small collection of books by CI/Sfb, the construction industry's classification scheme. I had been classifying technical and trade literature using CI/Sfb every day for over five years, and I did some private work, so his approach made sense. I duly turned up one Saturday morning and we started to discuss this small project. We also discussed how his business worked – I was reasonably aware of what surveyors did – but it seemed prudent to check. As the discussion unfolded it became clear that imposing CI/Sfb on his books was not the best way forward. His library should reflect the needs of his business, and as we discussed this further it became obvious that all his documents could be organised around his business process.

We spent some time talking through his business process, from becoming aware of an opportunity in the local area (London's Docklands), cultivating it as a prospect, making the sale, agreeing the contract, doing the work, billing, including residual legal issues, and adding the client to the company's contacts for further work. There was other stuff, but in crude terms that's how it worked. We talked about the various approaches to classification. I gave him a few basic principles of creating a classification scheme – he preferred numbers, so I was adamant that he should use decimals, rather than create long complicated codes, to permit the addition of new topics later on (I would direct non-librarians to Eric Hunter's excellent *Classification made Simple* at this point). This was late one Saturday afternoon; by the following Saturday he had designed a system. His system for his business. It was simple and it was right.

I have told this story many times, or rather several different versions of this story – and each one is true.

There are many aspects to this particular history, and each is a valid story. There is a story about networking, 'give-get' – contributing to a community and being recognised in turn. I was a member of the Construction Industry Information Group, and I had, like all good special interest group members, made a point of recommending freelance members, and using freelancers wherever I couldn't justify a full-time post. The surveyor's project came about because a freelancer who was swamped with work knew that I had CI/Sfb experience and had done private work, and I had recommended her several times. The point of the story is simple: networks work when they are based on need, trust and fair exchange.

There is a story about understanding motivation. What was not immediately apparent to me was that the surveyor made significant use of placement students. They had to learn to navigate his document systems very quickly: they would typically be around for three to six months, and they didn't have time to master a complex classification scheme. But they were there to learn how a business worked, and that's also how the document systems were arranged.

There is a story about a turning point: a bit of dumb luck and a bit of insight. This was the moment when I first saw that library skills could be applied in different ways, that they could support and extend the aims of the business which used them… and that, seven years later, led me to blag my way into a very expensive KM conference where I listened to Victoria Ward talk about KM, and cartographers, and librarians… and story-telling.

So: one 'larger' story can be used as a resource: to communicate something about information and business need, or networking, or motivation and contingency, or seizing the moment. Not all of these will click with everyone: some people like their stories spare, emphatic, straight to the point; some people need the intellectual excitement of assembling the value implicit in a richer, more contextual account. Various styles of story are appropriate in different settings: communicating with close colleagues, with whom you will share a good deal of specialist or local language, is not the same as working with new groups, with whom need to find common ground even as you are offering information, or knowledge. But whatever the approach, those who accept the story will have acquired information or knowledge which they can use, and often in a very practical way.

In the same way that Lyndsay and I only hoped to introduce people to the idea of story-telling as a device in our short hour, I can only introduce it here; I strongly recommend further reading. There are three authors who spring to mind: Steve Denning, http://www.stevedenning.com/, who used story-telling at the World Bank, David Snowden who uses it at IBM, and now at the Cynefin Centre for the study of organisational complexity, http://www.ibm.com/services/cynefin/, and Victoria Ward of Sparknow, http://spark.spanner.org/. All I can tell you is that I have used it and it has worked.

Mechanisms for communicating between publishers and librarians

Nancy Gerry, Blackwell Publishing

A good mix of librarians, publishers and subscription agents attended each of the workshops. Communication is obviously a theme that is important to all three parties in the information chain, as a lot of heated debate and discussion was generated in each session.

Key themes

Subscription Changes

The most common need for improved communication between publishers and librarians is when a subscription change occurs: title change, cessation, URL change, etc. Currently publishers inform agents of the bibliographic changes through their annual price catalogues and intermittent updates through the year. URL changes are sent to online customers and agents as they occur. *Librarians commented that these changes were not passed through to them in a timely manner, and said that they would be most useful if they were listed on the annual renewal list from the agents.*

Timing
A common issue was that publishers' price rises and bibliographic changes were not sent to the library in good time for renewals. Most agents receive this information from the publishers in August/September, and then process the changes through their systems. This triggers a bulletin alert to be sent to the libraries that hold subscriptions to the pertinent journals. *The common recommendation was that this information should be included on or with the renewal list provided by agents. It was also suggested that the relevant information is often not sent to the correct person within the library.*

Contact Names
Subscription agents and publishers agreed that the information they sent out to libraries should be enough to keep libraries informed, and that the problem was often that the information was not sent to the correct person within the library. The solution could be that libraries inform their agents of a contact name and e-mail address of the technical person (for online changes) or acquisitions librarian (for price changes). Many libraries also have an e-services librarian, who should also receive news on e-journal changes. *These contact names should then appear on the orders sent from agents to publishers. In turn publishers should display full contact details for order and e-help on their websites.*

How to get access to e-journals
Many of the librarians reported that it often took as long as three months to get an electronic subscription set up and working, due to the lack of information on whom to contact at the publishers, what details were required and how to technically set up and activate the e-journals. Agents suggested that their intermediary gateways (Ebsco Online or SwetsNet Navigator for example) were the perfect solution to this. *Libraries that go directly to publishers' own online services suggested that instructions should be more clearly presented on the publishers' websites.* The key complaint was that subscription reference numbers were often required to activate access. These reference numbers are often printed on the mailing label that gets discarded in the library post room. Publishers and agents admitted that it is difficult to standardise these numbers due to their systems assigning new numbers whenever a subscription changes between agents, or a library changes address or moves from a direct to consolidated service. No real solution to this problem was suggested during the three workshops.

Conclusions
Both agents and publishers have communication mechanisms that should, in theory, ensure that all relevant information is received by the subscribing library. However, these mechanisms are clearly not working satisfactorily. The recommendations that were offered by my three workshops are shown in italics above. The key ones are:

1. Renewal lists from agents should contain summaries of any changes that have happened throughout the year. They should also indicate if any alternative formats are available, e.g. combined or online only options
2. Publishers and agents should endeavour to send relevant information to the correct contacts in libraries, as the person ordering the subscription is not necessarily the correct person to receive e-journal update information
3. The method of setting up e-access needs to be much quicker and easier, and possibly not reliant on the elusive subscription reference number.

Remote access to e-journals

Judy Thomas, Open University

This workshop provided an opportunity for the exchange of experiences, ideas and solutions in providing remote users with access to a library's electronic resources. To stimulate discussion the sessions began with a brief outline of a project at the Open University which is using EZProxy software for remote access to e-journals. The goals of the project and preliminary results were presented. Discussion varied depending on the mix of librarians, intermediaries and publishers in the group, but centred around a number of themes: authentication, licences, and functionality.

Authenticating remote users is a major problem for libraries. Athens is a solution for a number of resources but other resources require libraries to manage a multitude of passwords. For resources which are IP-authenticated on campus, solutions identified included EZproxy software (which has the benefit of users not needing to reconfigure their browsers), other proxy software with users provided with the browser set-up on a CD-ROM, and Virtual Private Networks (VPNs). Choice was dependent, to a large extent, on the number of users requiring remote access. Solutions for passwords for non-IP-authenticated resources included passwords being kept behind authenticated web pages, being put in the MARC catalogue record of library management systems which support this, or provided to users by using cgi scripts.

On the subject of licences, it was generally felt that these could be worded more clearly, stipulating exactly how and where users were entitled to access resources. Although the solutions outlined above facilitate the same level of direct linking as is currently available on campus, some of the "bells and whistles" provided by suppliers (e.g. e-mail alerting services and personalisation features) may be lost.

It was encouraging that a number of intermediaries and publishers chose to attend the sessions. A continual dialogue between providers and librarians was considered essential to improve remote access, a service which more and more of our users are demanding.

E-journal Management Systems: the Way Forward or a Road to Nowhere?

Frances Boyle

The session looked at the some of the new products that are currently on the market that purport to help in the management of electronic journals. First we looked at why libraries may be looking at these systems, particularly with a view to maximising their investment whilst minimising internal maintenance overheads, and whether this is indeed the reality. The options that are available from the new electronic journal management tools, library management systems, agents and aggregator systems and institutional bespoke solutions were reviewed.

Three current players, TDNet, SerialsSolutions and 1CATE were looked at. A case study of TDNet was given from the experience of using the system within the Oxford University Library Services. Features such as searching, usage statistics provision, and profile alerting were demonstrated, summarising the advantages and disadvantages of using the system.

The final part of the session was participative, and a list of desiderata was drawn up of what libraries would like from an electronic journal management system in an ideal world. These included accurate bibliographic information, subscription information, link checking, a user-friendly interface, alerting features and a search capability. Experiences were shared during the sessions on these systems and other avenues that libraries were exploring in an attempt to manage their electronic journal portfolios.

E-procurement in partnership

Debbie Dore, Swets Blackwell Ltd

In the last few years all of us have heard more and more about the desire (particularly of purchasing people and Government) for us to make purchases electronically via the Internet.

The key benefits of working in this way are the reduction in time and cost, particularly of placing low-value orders. Wherever possible organisations are looking at linking their own purchasing system to the Internet, further reducing the need to process orders manually, add purchase order numbers or gain authorisation for payment every time an order is place. All of this functionality is built into the system and fully automated.

The workshop focused on introducing people to these concepts and showing them how HEep, the Higher Education E Procurement solution, had been tailor-made to fit with University purchasing systems without involving huge additional costs. This project is due to go live very shortly and has the backing of many purchasing professionals in HE. Swets Blackwell then introduced, SwetsWise, the online subscription management service, which can be integrated with HEep, or other e-procurement solutions, or accessed directly over the Internet.

All participants were interested in the concepts of e-procurement and saw some potential benefits, but for most it was their first exposure to this way of working and something they had heard nothing about internally within their institutions. There were obvious concerns about how they would set the system up initially and some doubts about the real cost savings of working this way, when other systems within their institutions were still required manually.

SwetsWise was of interest to all and they were encouraged to see how much an online service could do to help reduce administration, but most felt they would await developments within their institution before deciding to move forward.

A lively and interesting debate took place in each session and all those who attended said they felt much better informed about developments in e-procurement.

Seeing serials in a new light

Paul Bunn, The British Library

A small but very interested and enthusiastic group gathered on 17 April 2002 for this briefing session. The aim was to discuss the current state of play on new bibliographic standards for serials, and exchange views about their potential implementation. We met in the context of a number of bibliographic standards for serials reaching a crucial point in their development. This is leading to an attempt to provide substantial harmonisation of the three main international standards relating to serials cataloguing, which are as follows:

- The Anglo-American Cataloguing Rules, 2nd edition (AACR2)
- The International Standard Bibliographic Description for Serials (ISBD(S))
- The International Standard Serial Number (ISSN) Manual

ISBD(S) is not widely familiar as an actual working tool for serials in the UK but it does support and underlie the other two standards. The group considered the reasons why the various governing bodies and constituencies wanted to take another look at these three standards:

- The scope of serials was continuing to expand – not only are there e-journals, but a whole new universe of e-media is emerging, much of which looks serial in nature
- There was a need to deal more effectively with integrating resources – defined as a resource which is added to or changed by means of updates, which are integrated into the whole resource (examples could be not only loose-leaf publications and services but also databases and web sites). The titles of integrating resources were not necessarily very stable, to say the least, so we are putting forward the concept (not, of course, a new one) of latest entry to deal with this particular class of material
- The continuing question of which title changes should trigger the creation of a whole new bibliographic record – we want to increase the number of changes which are regarded as minor changes of title and which do not therefore need a new catalogue record, saving time and money whilst still providing accurate bibliographic coverage

The session then moved on to look at some practical examples of how the new concepts and guidelines from the three standards are going to affect catalogue records. My colleague, David Baron from the UK ISSN Centre at the British Library, discussed examples of catalogue records and how they would change.

Overall there was much useful discussion and exchange of views. We all wanted to take the unmissable opportunity to implement the new standards successfully. There will be a workshop on the subject at IFLA in Glasgow in August for those able to attend IFLA, and we also hope to arrange a similar workshop in the autumn. It is hoped that the end result will be more logic, coherence and economy in serials cataloguing and enhanced bibliographic control for the serials community in general.

MAGiC: Shining a New Light on a Grey Area

Paul Needham

The Briefing Session *MAGiC: Shining a New Light on a Grey Area* gave an overview of the work undertaken by the MAGiC project (http://www.magic.ac.uk/) to enhance the use, access and awareness of engineering technical reports in the UK.

Technical reports are often a significant source of information to engineers. They form an important subset of grey literature, material that is unpublished, or not available through conventional commercial channels. Such reports tend to contain information that is very specific, addressing a particular problem, and are very rich in experimental detail. In comparison to journals, the management of grey literature has received little attention in the rush towards the electronic brave new world.

An important outcome of the project is a demonstrator service – METReS – which comprises a web site (http://magic-reports.lib.cranfield.ac.uk/) delivering records from the fledgling National Reports Catalogue (NRC). The records are gathered using metadata harvesting. They provide information on report producers, report series and reports, as well as links to collections that hold reports, access to electronic full text and integrated document supply via the British Library Document Supply Centre. No Internet connection was available at the conference venue, and it felt quite bizarre attempting to show off a dynamic database-driven web site using transparencies and an overhead projector.

Giving a presentation on grey literature at an event focussed on published journals was always going to be an uphill struggle. The lists of attendees, issued before the start of the conference, indicated that 23 people would show up over the three sessions. As it turned out, just eleven of those actually materialised. They ranged from the curious to those firmly committed to this important body of literature and, interestingly, over half those who attended came from overseas.

So, was it worth it? Well, yes. Several key people turned up at my briefing sessions, and reactions to the presentation seemed positive. The conference dinner was most enjoyable and the fireworks display spectacular. And last, but not least, I had the opportunity to gain some understanding of the weird and wonderful world of journal publishers.

NHS Information Workshop

Peter Baker

The workshop was attended by a mixture of suppliers, HE librarians and NHS librarians, and discussed the forthcoming national procurement of resources on behalf of the NHS workforce confederations. The emerging National Knowledge Service for the NHS was debated and some af the issues around – cross sectoral (particularly HE/NHS), cultural, technical and financial – as well as licensing were discussed. The forthcoming year will see further consolidation and a move to turn the principles from a wish list into a substantive project; however, it may be 2-3 years before the process turns into something end users may start to benefit from.

Report on Accessibility Workshops

Kevin Carey, Director, humanITy

Perhaps the most lasting impression from the accessibility workshops was the surprise of participants that accessibility to information is a legal issue. There is a general provision on the right to information in the European Convention on Human Rights, made more solid by the insertion of rights for disabled people in Clause 21 of the Amsterdam Treaty of 1997, and there are an increasing number of test cases being mounted in respect of the UK Disability Discrimination Act, which is now the responsibility of the Disability Rights Commission.

The paradigm of disability generally perceived is one which encompasses the wheelchair user and the guide dog owner, but these are only two manifestations of highly visible disability. Approximately 10% of the population – most of them elderly – are officially classified as disabled, but there is another 40% of the population that experiences some functional limitation when using digital information systems. Participants were notably unaware of this ‘hinterland' of functional limitation but immediately grasped its significance. It may be difficult to deal with such problems in the analogue environment, but the digital environment offers scope for information customisation with the potential later on for machine autonomous adjustment based on user behaviour. But these possibilities depend upon the granularity of the information, correct labelling and the supply of appropriate tools within the data.

In the digital age the concept of compliance with accessibility requirements is plastic; as technology develops the possibilities for access will broaden and deepen and this will carry with it greater compliance requirements; this must therefore be an iterative process.

Moving from print to e-journals – strategies and structures

Simon Bevan

The workshop started with an introduction looking at some of the issues that have arisen at Cranfield University during the move from print to e-journals, particularly concentrating on the critical success factors for successful implementation.

Attendees were given a brief history describing the foundation of the College of Aeronautics in 1946, the granting of university status in 1969, and the name change to Cranfield University in 1992. The structure of the institution was described: three distant campuses with separate library services and budgets, just over 3,000 students, over 80% of whom are postgraduate. Clearly different institutions are likely to have slightly different factors affecting their success in this area, but in the case of Cranfield, some of these structural characteristics are very important.

Cranfield has a group approach to the management of e-journals – an e-policy group looking at strategy, and an e-resources working group undertaking more operational tasks. Continuity is maintained by the chair being the same for both groups.

Some of the critical success factors at Cranfield were detailed. Of central importance are the lack of any formal library policy committee and the ability of the library to control its own acquisitions budget and vire money across budgets. These factors allow the service to react to potential deals very quickly. The importance of the involvement of lots of different members of staff (systems, information specialists, senior staff, serials staff) was emphasised, as well as the importance of defining the best methods of access for the particular clientele, getting the timing right on training and marketing, and obviously the most important factor, getting the selection policy right.

Workshop attendees were then asked to form into groups and consider the critical success factors for their own particular institutions, or particular businesses (publishers, aggregators, etc.). The following list of factors came out in discussions.

- Introduction of e-journals should be based on user needs
- Simple and stable access is essential (including transparent authentication), from both on and off campus
- The publishers' ability to get it right is of central importance in terms of: support, interface, searching, right product availability, right technology, price flexibility
- Timing of deals – budget cycle
- Publicity & information on new deals
- Critical mass of titles
- Licensing, requires clarity and easy management
- Institutional funding methods have an impact on ease of implementation, e.g. subject funding
- Publicity – academic staff involvement
- Training – IT skills (training must include all library staff)
- Staff structures – change management, and general commitment of staff to e-journals
- Cost/finance – ability to pay
- Strategic plan
  – Attitude and understanding of decision makers
  – Institutional support
- Positive staff attitude
- Infrastructure (network, speed, PCs)
- The requirement for long trials was mentioned
  – Customer need versus publisher offers
- The need to reduce risk when making decisions on e-journal acquisition
- Awareness that there are other important stakeholders, e.g. Computer Centre, bindery, etc.
- Trust issues, including perpetual access
- Archiving/backfiles

- Flexibility on ability to cancel print
- Awareness of other related services & interfaces – linking services, TOC services, docdel services
- Awareness and consideration of effects of successful implementation
  – Lower attendance
  – Different type of use of library service
  – Photocopying income down
  – Printing income up

At the end of the workshop there was a brief description of a survey undertaken at Cranfield on the views of PhD students, results of which are reported elsewhere [(1)].

Finally, attendees were asked to complete a brief questionnaire listing critical success factors and putting them in order of importance. Twenty-eight factors were identified prior to the workshop and attendees were asked to select on a ten-point scale of importance. For analysis purposes this was rationalised to five points. The responses ranged from 4.8 to 3.5, a fairly narrow range, implying that all factors identified were of some importance. The most important factors in order were, 1. provision of the right titles (4.8), 2. publisher ability to make titles available when required (4.6), 3. commitment of the library (4.5), commitment of library staff (4.5), type of user (4.5), technological infrastructure (4.5), archiving/backfile availability (4.5) and password/authentication complexity (4.5). The least important were considered to be the type of institution (3.5), the dependence on the success of other e-resources (3.6), provision of a lot of journal titles (3.6), and internal staff structures (3.6).

Reference

(1) Simon Bevan, Satu Nieminen, Ruth Hunn and Michelle Sweet . Replacing print with e-journals: Can it be done? – A case study. *Serials*, 14(1), 2001, 17-24.

Knowledge Management: the reality

David Alsmeyer

This panel session presented three speakers' views on the state of Knowledge Management (KM) in 2002, followed by a stimulating discussion.

Malcolm Hafner, VP Europe Software Services, Divine, opened up by painting a picture of knowledge management as the conjunction of people who come together for a purpose and who will derive some benefit from the KM system processes that must be repeatable and predictable, and use technology that is scalable and reliable. Underpinning these, though, information is at the core of knowledge management: information that is both internal and external to the organisation. The key problem, Hafner stressed, is to get the right information into the system and to move it around to the right people at the right time. But KM operates in an environment where it is seen as an unproven idea with a poor record of delivering real results and often, where good results have been shown, these have been achieved almost by accident. Companies in the USA don't talk about KM any more, but use alternatives such as corporate memory. But we shouldn't let its bad press prevent us from trying to benefit and develop the knowledge within the organisation. For KM to be successful in today's environment, it needs to be driven from the top of the organisation.

Malcolm put forward the idea that, at the very least, KM initiatives should strive to introduce managed serendipity into the organisation. He concluded by speculating on the role of the information professional in the world of knowledge management. Should we be custodians of knowledge, building on our current role of hosting information resources in the organisation? Or can we lead KM in the organisation, since we ought to understand the business's information needs and processes? Or should we act as experts, or knowledge coaches, helping those in the organisation understand what they know and how to share it with others? And of course, we already play a large part in procuring knowledge from outside the organisation; how can we build on this?

Kim Horwood, of the Department of Trade and Industry (DTI), followed by describing KM activities in government. In Kim's opinion, the most important thing about KM is joining people together and she described this as an extension of the work that most active librarians already do. KM is about knowing what information the organisation needs, from where it can be obtained, judging its reliability, knowing who to trust to share it with, and how to deal with it after it's been used in the organisation. Kim described a number of success stories for KM in the DTI: end of year reviews require individuals to describe how they've shared their knowledge with others, knowhow@dti, an internal yellow pages system that lets individuals describe their experience and knowledge. The system was described as a set of tools that lets users create and edit their personal homepages to describe their jobs, their contacts within and outside the organisations, current and past projects, professional memberships, interests, skills, and expertise. The system is voluntary, but Kim said it was taking off because it was being seen as providing real benefits to those who contribute. Many of the benefits that users received were unexpected by the designers – for example, people were using the system to identify potential job-sharers, and communities of practice, built on threaded discussion lists, have been created on training and development issues. Kim concluded by advising us to use CONK, the cost of not knowing, in making our cases for managing knowledge. If we can vividly describe the costs of reinventing the wheel, or slow responses to customers, or repeated errors, to management, then we can gain the resources that we need.

Mark Field, Information and KM Advisor at the Chartered Institute of Library and Information Professionals (CILIP), completed the panel's presentations. In his talk, Mark drew on the use of story telling as a way of communicating. Mark demonstrated that story telling is particularly effective because, as well as communicating information and knowledge, it passes on the values and belief systems that underlie the knowledge. From a reporter's point of view, though, story telling makes it very difficult to take coherent notes and retell the main points of their presentation. His bottom line was that "where IT people and librarians work together, good things happen".

Richard Hodson opened the discussion by asking about the education process needed to implement knowledge management in an organisation. Malcolm Hafner felt that the fastest impact an organisation can make is through leadership and personality. You can train people to get from a to b but they won't get on the journey unless leadership has convinced them to make the journey. Culture will not change without strong leadership. Kim Horwood stressed that it was important to tackle the "What's in it for me?" question by ensuring that the system delivers benefits to those who must use it. She also pushed for the use of both top-down and bottom-up planning of KM systems. Malcolm wasn't entirely convinced by the self-interested view of KM systems. There are enough compensations at work to do a good job if circumstances are right. People are under enough business pressures to use any good business tool they can find if it helps. Mark Field talked about the importance of deep learning in understanding knowledge management. You won't get this from just attending the right conferences. It needs reading, thinking, and doing.