

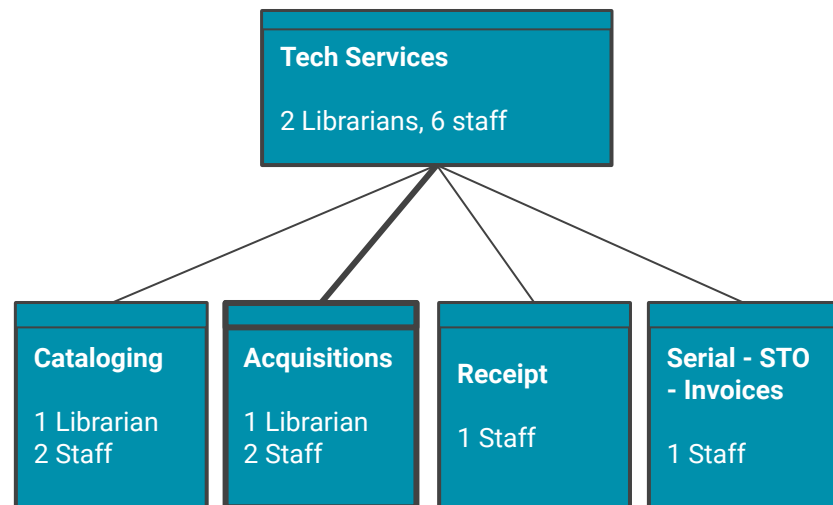
Promoting transparency & collaboration with a Database A-Z audit & new ER acquisition workflow



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Background: Miami University Libraries

- Public institution in Oxford, OH
 - ~17,000 undergraduates
 - ~2,500 graduate students
 - Regional campuses
 - Hamilton: ~3,000 students
 - Middletown: ~2,000 students
- Tech Services centralized
 - All ER work and some cataloging and acquisitions for regional campuses
- ER is mostly 1 librarian with some tasks farmed out
- Subject librarians, in Oxford, 10



Background: Previous Workflow

Multiple emails	LibAcq, ER or Acqu librarian's, LibSerials
LibGuides	A-Z list lives here, also ER troubleshooting queue
Buyway	
Communication expectations different	

During spring 2019, Jennifer Bazeley transitioned all URLs and descriptions to the LibGuides A-Z. All re-direct URLs in LibGuides A to Z were updated to the actual resource URLs. Jerry Yarnetsky will replace the A to Z list on the library's Drupal web site with a link to the LibGuides A-Z list during summer 2019.

Who maintains the Databases A to Z list on the library website?

<https://www.lib.miamioh.edu/databases>

The Databases A to Z list on the library website is maintained by technical services librarians or web services librarians, who are able to add, delete, and modify the URLs and the database descriptions associated with them. For access to the administrative side of this site, contact Jerry Yarnetsky at jerry.yarnetsky@miamioh.edu.

Why do the URLs for Databases A to Z have a different syntax than the links we use in the catalog?

Adding an entry to this list is what generates a re-direct URL that we use in the LibGuides Assets/Databases module.

Re-direct URLs look like this:

<https://www.lib.miamioh.edu/indexes/redirect/227>

The number at the end of the link is what identifies each database uniquely. The re-direct URL automatically pushes users through the proxy server when clicked.

Please note: The proxy prefix NEVER needs to be added to the front of these URLs.

When do I need to administer Databases A to Z?

Whenever a resource changes its description or URL, and whenever a resource is added or deleted to our holdings, this list needs to be updated.

Accessing Databases A to Z Administration

1. Go to the Library's Staff Area at <https://www.lib.miamioh.edu/user>.
2. Log in with your unique ID and password (currently only JWB has these privileges).
3. In the left side User Menu, you should see links for "Create EZProxy Resource" and "Administer EZProxy Resource".

Updating an Existing Resource

1. Follow the steps above.
2. Click on "Administer EZProxy Resource".
3. Sort the list by clicking on the "Pages" column header.
4. Find the entry that you need to update.
5. Click on the "Edit" link to the right of the entry.
6. Update the URL or description as needed.
7. Click on "Save".

Deleting a Resource

1. Click on "Administer EZProxy Resource".
2. Sort the list by clicking on the "Pages" column header.
3. Find the entry that you need to delete.
4. Click on the "Delete" link to the right of the entry.
5. Click OK.
6. In LibGuides Assets/Databases, delete the resource.

Adding a New Resource

1. Follow the steps above for accessing A to Z administration.
2. Click on "Create EZProxy Resource" in the left side User Menu.
3. Enter the title of the database in the Title field.
4. Enter a description of the database in the Description box.
5. Enter the URL (without proxy prefix) in the URL box.

Background: Previous Workflow

Multiple emails	LibAcq, ER or Acq librarian's, LibSerials
LibGuides	A-Z list lives here (transferred from EBSCO ERM) as does ER problem Queue
Buyway	University level purchasing system
Communication expectations different	Both sides had assumptions, which led to longer than needed email threads




Phase 1: A-Z Updates

Issues

- Paywalls!
- Old, broken links
- Wordy, or incorrect descriptions
- What is a 'database' anyway?
- Librarians and patrons confused about access

Methods

- We split the list, looked for paywalls
 - Work with ER on link issues
 - List divided up for subject librarians, to review and edit descriptions
 - Some removal decisions
 - Collections heads proofread, checked html codes
 - Will be uploaded to SpringShare to update the batch
- 

Phase 2: ERA Workflow

- ER reworked the resource request process with input from the subject liaison librarians.

Why was this needed?

- Confusion
- ER was Overwhelmed
- Personal organization had failed
 - Email folders
 - Google Task
 - Trello
 - Sticky notes

Phase 2: ERA Workflow

Why now?

- Just moved ER troubleshooting queue
- Wanted to decrease parallel processes
- We don't want to end up in the same spot in the future

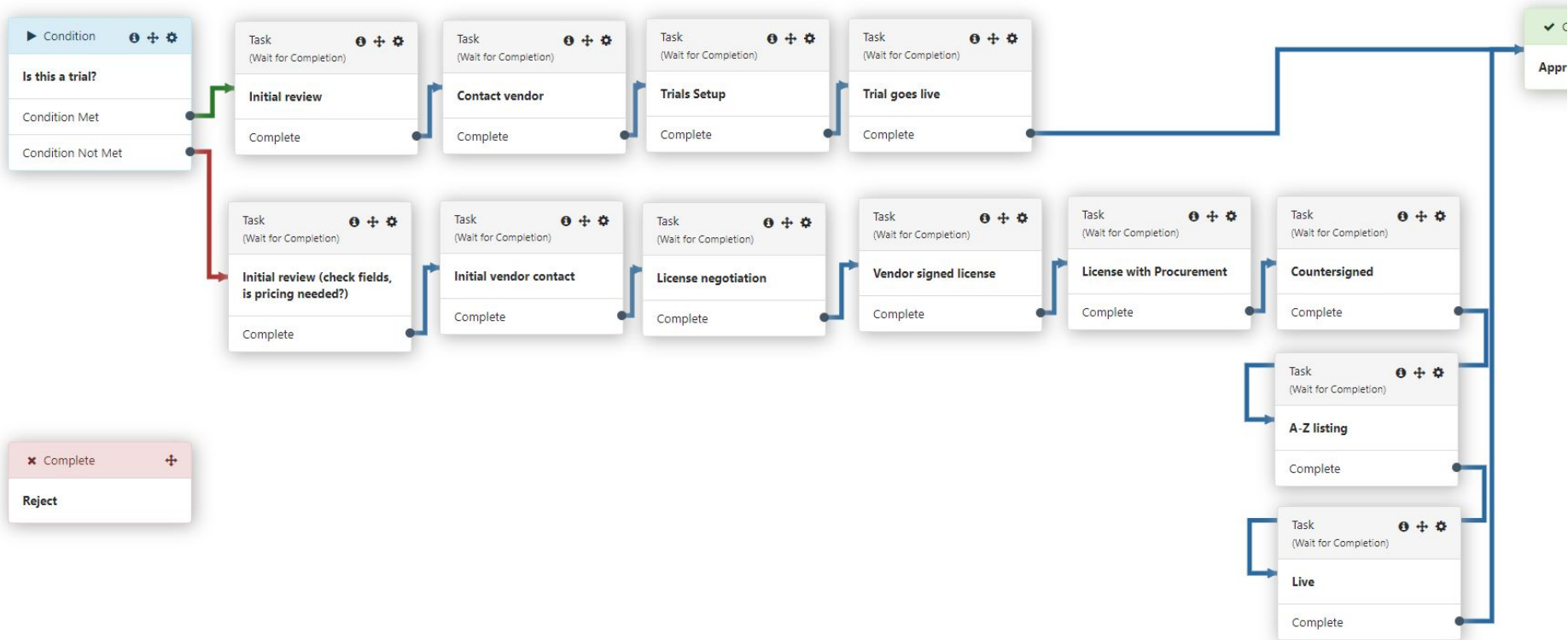
Sketch of Workflow

link in email ~~to~~
library stuff
connections
decided
pricing
general terms
wording
change
other can
pricing if no go
what was it
other
can it be pricing
description (no)
Started Kings Fund
title vendor pricing

? Usable option?
form - Kevin - my role
purchase / sub
review - priority - queue
revision / 1st look
(reviewed by kg)
journal
vendor contacted
transfer needed - ping out to Kevin
trial setup - editing license
list found license check list
cost
vendor signed
procurement
(stages) ada
A-Z
counter signed
encumbered
(kg+KA) A-Z listing made
live

note
was
notes
main
no
of
things
important

New Workflow



ER Acquisitions

[+ Show Help](#) [- Hide Help](#)Requestor * 

Cara Calabrese

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What is the title? (please include any alternative names or acronyms) * 

What is the vendor? *

Vendor contact information (add any contact details or representatives you have been working with)

What type of resource is this?

- Data Set
- Database
- eBook package/Collection
- eJournal/Newspaper package/Collection
- eJournal/Newspaper (single title)
- Video Collection
- Other (describe in the description of the resource box below)

What is the intended Acquisition type?

What is the intended Acquisition type?

- Trial
- Free or Open Access
- Subscription/Lease
- Purchase/Perpetual Access

What is the fund? * 

Do you need pricing? *

- Yes
- No
- Other

Is there a timeframe that this is needed? (for trials please include length, 30 days is standard)

Provide a description of the resource (to be used either in the Trial or A-Z description) * 

URL

Notes

Service Request ID: 18240728



Backend of Form

General Tasks/Activities People T&E My Alerts (0) Assets/Clis (0) Read By (1)

[Actions](#)
[Add](#)
[Edit](#)
[Refresh](#)
[Print View](#)

Details

Acct/Dept

Library

Type

Service Request / ER Acquisitions

Service

The Workshop / ER Acquisitions

Priority

5

Source

TD Web Portal

Created

Thu 7/29/21 9:12 AM by Cara Calabrese

Last Modified

Thu 7/29/21 9:18 AM by Cara Calabrese

Age

3 days old

Reviewer

Unassigned

Responsibility

Electronic Resources

Estimated Hours

0.00

Actual Hours

0.00

What is the vendor?

BCC Research

Vendor contact information (add any contact details or representatives you have been working with)

n/a

Requestor



Cara Calabrese

calabrcm@miamioh.edu

+1 513 529 2886

Acq & Access Libr; Asst Libr

staff

calabrcm

[Find Referenced](#)

Workflow

ER Acquisitions

[History](#)
[View Progress](#)

Current Activities (1)

Vendor signed license

Workflow Task

Electronic Resources

[Mark Complete](#)
[Update](#)
[Edit](#)

Attachments (0)



Phase 2: ERA Workflow

- Adding a new group
 - More collaboration!
 - More transparency!
- Future potential updates

Initial Outcomes

— — —

A-Z list now updated, links work and descriptions are correct

Removed entries no longer active or necessary, including dead open access sources

One method for selectors to request ER – increased transparency and communication

Start discussion on what should be on the A-Z list (databases, collections within databases, ebooks ect)

Mutually Beneficial Project

- Organized process, took out the guesswork
- Fewer emails
- Quicker turnaround time
- Less points of entry - less places to check/track
- Subject librarians know where to check status
 - ER doesn't have to send out many emails saying 'sit tight'
- Troubleshooting and ERA is same place
- Course reserves also in TD could try to connect in future

Creating your own workflows

TeamDynamics	Library or university may subscribe
Trello	Free
Google Forms	Free
Google Tasks	Free
MS Teams (Forms, Planner)	Library or university may subscribe
Qualtrics	Library or university may subscribe

Board Orders

- Re: IMC materials from endowment funds
- ProQuest dissertation order
- Re: Faculty request for Il corallo rosso in Mediterraneo
- Re: Inquiry about Simeon Marsalis' book
- An acquisitions adventure!

+ Add a card

Video Orders

- Girl Rising
- Re: Hammer and Tickle film
- Fwd: possible streaming film purchase: Toxic
- And then they came for us
- The Poisoned Dream: The Love Canal Nightmare

+ Add a card

in process

- Wall Street Journal
- Re: New york times newspaper
- Help finding a documentary

Mar 31

+ Add a card

Orders done

- Re: Request for DVDs to be viewable online
- Jojo rabbit
- digital site license for A Jury of her Peers
- Finish textbooks
- Re: Digital Content Inquiry
- Fwd: Louder Than A Bomb

+ Add a card

Can't supply

- Re: Purchasing and ho streaming video
- Re: Film for 318E Cour
- Re: Video: Hidden Wo

+ Add a card

TASKS

Orders ▾



Can we buy this film with a Digital Site License?

✉ Can we buy this film with a Digital ...

○ Damaged books

✉ Damaged books

○ Chronicle of Higher Education report purchase

✉ Chronicle of Higher Education rep...

○ Film purchase: JP license

✉ Film purchase

○ Vital Signs:/sound and fury/world w/o bodies WWB-ordered-confirmed, SV-DVD is ordered, waiting to order streaming...

✉ Vital Signs: Crip Culture Talks Bac...

○ art site book? Emailed artist not over \$100 7/3 70 euros- asked about paypal

✉ Another faculty request

Completed (58)



3:02 PM



Test version of ER Acquisitions forms

* Required

What is the title? (please include any alternative names or acronyms) *

Your answer

What is the vendor?

Your answer



Vendor contact information(add any contact details or representatives you have been working with)

Your answer

Thanks

Questions?



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