S17 Efficiency at the expense of control: open source vs vendor-maintained knowledgebases.

A BRIEF HISTORY OF THE CUFTS KNOWLEDGEBASE

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Simon Fraser University, Burnaby, BC Canada

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The CUFTS Knowledgebase

• Timelines 1997 to 2017.

• Operations and Maintenance (Library as Vendor).

• The decision to decommission.

• SFU Library under a vendor-managed KB (Alma Central Knowledgebase and Community Zone).
Timeline

- GODOT
- CUFTS KB
- CUFTS ERM
- reSearcher suite
- RFP for a new ILS
- SFU adopts Summon
- RFP: shortlist, evaluation and implementation
- Go live Alma & Primo (May 25th, 2017)
- reSearcher decommissioned (August 31st, 2017)
Partners

MnPALS adopts CUFTS and GODOT

True Serials (formerly part of NYLINK)

23 hosted sites at SFU at time of SFU decommission

Libraries adopt discovery services and drop CUFTS to avoid dual KB maintenance

True Serials independently managing their own global KB
Operations & Maintenance - staffing

- 1 Systems Analyst Developer (CUFTS/CUFTS ERM)
- 0.2 Systems Analyst (GODOT)
- 1 Electronic Resources Librarian
- 4 support staff managing the CUFTS MASTER KB

We all had other duties in the library in addition to supporting the reSearcher suite (and the CUFTS MASTER KB).
## CUFTS MASTER KB

### New Resource Table

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CUFTS MASTER formats and modules

- CUFTS generic template.
  - Tab delimited text files.
  - Similar column headings to KBART.
  - Manipulate title lists to fit the template.

- Publisher/provider-specific modules.
  - So long as title lists were consistent.

- Over time – publisher modules were phased out as publishers adopted KBART.
Updates from CUFTS MASTER moved over to Production in 2 working days.
Total control over updates and data

- SFU Administrators had access to the Global KB in Production.
- Live corrections to the Global KB in Production.
- Although we have a schedule, we can update the MASTER KB whenever we wanted to respond to client needs.
- We can move a CUFTS MASTER update to Production manually.
- Add only targets library clients need.
Library as Vendor

**PROS**

- Speak their language.
- Library staff talking to other library staff.
- Librarians talking to librarians.
- Relationship building with other libraries and vendors (publishers and providers).

**CONS**

- Sometimes no access for testing.
- Educating vendors about metadata only – but SFU doesn’t subscribe….
- Time zone deficiencies (Pacific time).
- Support by email only.
The decision to decommission reSearcher

- Managing multiple silos for electronic resources – unsustainable.
- Growth of non-serial electronic resources (e-books, digital archives, streaming audio/video).
- Rise of discovery corresponding with decline in library clients.
- Result of the Request for Proposals (RFP) for an Integrated Library System.
Electronic Journals

Your Current Search

Subject

Chemistry

Refine Your Search

Add Title

All

Change Subject

Very relevant titles entries 4-63831

Science

1997-01-01 (v.275, i.3) to current from Advancement of Science
1880-07-03 (v.1, i.1) to 2011-12-23 (v.334)
Sciences Collection - JSTOR
1997-01-03 to 2004-12-24 from Academic

Top Resources

SciFinder
Covers all aspects of chemistry (Chemical Abstracts online). NOTE: For use by current SFU faculty, staff and registered students only.

Reaxys
Reaxys has extensive coverage of quality and authoritative property, reaction, and workflow information in organic, inorganic and organometallic chemistry. Expert chemists

Juvenile Literature and British society, 1850-1950: the age of adolescence
Ferral, Charles.
Call number: Library WEB
Rating:

Between syntax and semantics
Huang, Cheng-Teh James.
Call number: Library WEB
Rating:

Philosophical perspectives on gender in sport and physical activity

Call number: Library WEB
Rating:
Summon as our discovery service
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**CUFTS**

### New Resource

- **Filter:** wiley

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Multiple silos and knowledgebases

1. SFU CUFTS knowledgebase (SFU e-journal holdings).
2. CUFTS ERM (SFU list of databases).
3. Millennium (e-books, streaming audio and video, and digital collections).
4. Serial Solutions 360 Core (Summon indexing and index-enhanced linking).
5. CUFTS MASTER knowledgebase (reSearcher suite library clients).
Rise and adoption of discovery – losing clients

- 2004: 33 partners
- 2006: 34 partners
- 2008: 40 partners
- 2010: 42 partners
- 2012: 41 partners
- 2014: 29 partners
- 2016: 26 partners
- 2018: Libraries adopt discovery services and drop CUFTS to avoid dual KB maintenance
- 23 hosted sites at SFU at time of SFU decommission
Ex Libris, a ProQuest Company

Simon Fraser University Selects Ex Libris Alma and Primo

The British Columbia university will optimize workflows within the library and integrate a wide variety of systems and services.

Chicago, IL—September 19, 2016. Ex Libris, a ProQuest company, is pleased to announce that Simon Fraser University (SFU), located in British Columbia, Canada, has chosen the Ex Libris Alma® library management service and Primo® discovery and delivery platform. These solutions will replace SFU’s Millennium system from Innovative, which has been in place for over 20 years, and will enable the library to introduce more efficient workflows.

Simon Fraser University reached its decision following a rigorous evaluation process in which strict requirements were defined and several solutions compared. Alma and Primo were selected on the basis of numerous technical and collaborative features. SFU Library sought a system that uses the latest technology, is available on a cloud-based, software-as-a-service platform, and provides robust points of integration to facilitate interoperability with university solutions and area partners. In choosing Alma and Primo, SFU saw an opportunity to optimize its core processes, as well as to extend its outreach and collaboration with various internal and external partners.

Brian Owen, associate university librarian for library technology services and special collections at the SFU Library, explained, “The SFU Library is proud of its reputation as a technologically innovative library. We work with a wide range of systems and services and are the home base for the Public Knowledge Project (PKP), which develops Open Journal Systems (OJS) and other open-source publishing software. We are eagerly anticipating the implementation of Alma and Primo as significant additions to our local systems and services and are excited about the possibilities that these two solutions present.”

“We are pleased to welcome Simon Fraser University to our growing Alma and Primo customer community,” commented Eric Hines, president of Ex Libris North America. “Always at the forefront of library technology and innovation through services such as GODOT and CLIR, Simon Fraser is the first British Columbia institution to choose Alma and Primo. We look forward to seeing the university’s positive use of the Ex Libris suite of products in fulfilling the library’s and university’s mission.”
Library-wide strategic advantages

• Helped us to enable some organizational change management.
• Eliminated the work silos and promoted a sense of shared and common goals.
• Revised job descriptions.
  • Problem solving, analytical skills and independent decision-making.
• Delegation of work/duties to match expenditures
  • Day to day maintenance for electronic resources is distributed and delegated to multiple library staff.
  • The Electronic Resources Librarian can now concentrate on strategic priorities.
Pre-Alma, the Electronic Resources Librarian had sole responsibility for establishing and maintaining access as well as troubleshooting and managing online journal holdings, database access and anything related to electronic resources using CUFTS and CUFTS ERM.
Pre-Alma, Processing staff generally all worked with the Millennium system. Units were organized by format: serials vs monographs and dealing primarily with physical materials.
Resource Acquisition, Management & Metadata (RAMM)

- Areas are organized by function rather than format.
- More shared responsibilities, staff doing a wider variety of work under a common job description.
- As print declines and electronic increases, need higher grade positions requiring higher level skills such as problem solving and critical thinking.
- Closer collaborations between Collections and RAMM.
Collections Management (4 staff)

Resource Acquisition, Management & Metadata (18 staff)

- Division Head
- Technical Services Librarian
- Invoicing (2)
- Ordering (2)
- Checking & Receiving (3)
- E-serials unit (2)
- Cataloguing (7)
- "Power" cataloguers
- Copy cataloguers
Electronic Resources Task Group

Division Head

Technical Services Librarian

Electronic Resources Librarian

Ordering (2)

“Power” cataloguers

E-serials unit (2)
Vendor-Managed KB - disadvantages

• More linking errors are being reported.
• Missing entries in packages and entries needing to be removed (from aggregators).
• Quality of bibliographic records in the CZ – brief records.
• Slow response time for corrections/updates to the Alma CKB Community Zone (CZ).
  • Average of 46 days to close.
  • 30% of our cases take 60+ days to solve (more than 2 months).
  • In the full 2018 calendar year, averaging 10 data service cases/month.
Other Alma CKB CZ Trends and Observations

• Discrepancies between source data and the Alma CKB CZ e-collection.
• Duplicate and outdated e-collections existing in the CKB CZ.
• Inconsistent linking levels from the same publisher/interface.
• Late or missing yearly collections.
• CKB CZ e-collections do not match library purchase options
  • Libraries can purchase Project Muse UPCC e-books by subject and year, but the Alma CKB CZ only lists the entire collection by year.
Duplicate and possibly outdated targets

1. UC Press E-Books Collection, 1982-2004 (Public)
   - Type: Selective package
   - Service: Full Text
   - Interface name: University of California Press
   - Linking Level: Book
   - Creation Date: 2010-02-03 14:19:31
   - Modification Date: 2016-04-24 16:44:13

3. UC Press Free E-Books Collection, 1982-2004
   - Type: Selective package
   - Service: Full Text
   - Interface name: University of California Press
   - Linking Level: Book
   - Creation Date: 2010-02-03 14:19:31
   - Modification Date: 2016-04-24 16:44:13

7. Mass Observation Online (Update I)
   - Type: Selective package
   - Service: Full Text
   - Interface name: Adam Matthew Digital
   - Linking Level: Book
   - Creation Date: 2017-07-25 14:15:08
   - Modification Date: 2018-05-31 08:52:51

8. Mass Observation Online (Update II)
   - Type: Selective package
   - Service: Full Text
   - Interface name: Adam Matthew Digital
   - Linking Level: Book
   - Creation Date: 2017-07-25 14:15:51
   - Modification Date: 2017-07-25 14:16:10

2. Adam Matthew Digital Mass Observation Online 1
   - Type: Selective package
   - Service: Full Text
   - Interface name: Adam Matthew Digital
   - Linking Level: Book
   - Creation Date: 2016-08-04 15:39:59
   - Modification Date: 2016-08-04 15:40:09

3. Adam Matthew Digital Mass Observation Online 2
   - Type: Selective package
   - Service: Full Text
   - Interface name: Adam Matthew Digital
   - Linking Level: Book
   - Creation Date: 2016-08-04 15:39:59
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Late and missing yearly collections
CZ e-collections do not match library purchase options

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Library-wide strategic efficiencies