



# SWAN Advisory: E-Resource Notes

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Thursday, February 27, 2020, 1:30 PM – 3:30 PM  
Burr Ridge

## Facilitator:

Robin Hofstetter, Chair, Electronic Resources Consultant, User Experience, SWAN

## Agenda/Notes:

### I. Welcome and introductions

Robin welcomed the group to the first meeting of the E-Resource Advisory group. They shared how to find meeting agenda, notes, and related information. The agenda will also be posted in the SWAN forums. A show of hands indicated that all were invited and have access to the online forums. The forums are available for open discussion and sharing ideas. We hope to encourage valuable networking and discussion through the online forums.

### II. Statistics (30 minutes)

- What are your needs?
- IPLAR
- How are you gathering stats now?

The group share how they collection and report usage data. Some include this information in monthly Board reports, others collect the information and other people in the library are responsible for reporting.

There was a split between statistical reporting of database use versus e-audiobook/e-book usage. Some libraries report e-audiobook/e-book usage within their circulation statistics. Most of the people responsible for collecting and reporting database usage also like to pull statistics to help with purchasing and renewal decisions. Cost per usage or cost per user metrics are very helpful in analyzing renewals.

Differences in how vendors collect and report statistics makes it difficult to maintain consistent reporting practice. Some vendors send email statistic reports, which libraries have experienced reporting discrepancies in the past; others provide an administrative portal for pulling statistics. Delay in statistical reporting makes monthly targeted reporting across all vendors difficult – some lag a month or two behind. Even vendors who provide COUNTER statistics may have a reporting lag. It seems since these are computer generated/collected, this data should be more expedient and constant.

The difference between searches and sessions is significant. When analyzing statistics, it is not as important to know what is being tracked (at least for those statistics are reported to), but consistency in metrics for trend analysis is critical. And metrics for determining cost per use is important for collection development/renewals.

Many use cost per user/use calculated metrics as leverage when questioning billing or working on renewals. Most have good results when dealing directly with the vendor on invoicing and asking for reductions.

Pulling statistics across the wide range of resources is cumbersome and time consuming. Tony (INS) created a guide for an administrative assistant to use for gathering the statistics. Sharing methods of statistical reporting, tracking spreadsheets, and tips in analysis is something the group feels would be valuable for everyone.

### **IPLAR**

Annual reporting of the Illinois Public Library Annual Report data is done once a year, based on library fiscal cycle. The report is due 90 days after close of fiscal cycle. Some libraries collect statistics monthly so that completion of IPLAR only requires adding the year's total. Others collection once a year to satisfy IPLAR requirements. Questions centered on who uses this data and how it is used. It is onerous to collect and if any changes are made to methods of reporting (e.g. recently a change was made from # of subscriptions to usage) it can be problematic to go back historically and collect the newly required information.

III. Break (15 minutes)

IV. Troubleshooting best practices (30 minutes)

Robin shared some troubleshooting tips to expediate problem resolution. If a library is having any issues with database use, contact [help@swanlibraries.net](mailto:help@swanlibraries.net) providing the following:

- Generally, patron barcode is not needed, however a double check before submitting a ticket on the patron status (card valid, blocked/barred, etc) should be as a first step in troubleshooting
- Specifics about what is happening
- Screen shots are helpful
- If you have a sales or support contact person with the vendor, include that with the ticket.

- Maintain a folder of all your sales/support people to contact. While Robin is happy to contact the vendor on your behalf, vendors are more responsive to the direct customer. Since Robin's name is not on the license, many vendors will not respond to their inquiries without authorization from the customer/library.
- If you ever have a change in IP range it will be much easier to track how to contact the vendors. Also, any change in IP range needs to be reporting to SWAN in a support ticket.
- If the problem is associated with a URL/link, include the full URL, as well as the referring page where it is referenced.
- Verify that your license is active and has been renewed.

Methods of authentication are also critical in troubleshooting:

- Customer Id (barcode prefix matching) – this method should not be used. It is based on the first 6 digits of barcodes. If you are still using this method for any database/e-content vendors, notify Robin via [help@swanlibraries.net](mailto:help@swanlibraries.net) and they will work with your library and vendor to use an authenticated method. The problem with prefix matching is that the service does not connect to the ILS and there the library card is not authenticate or updated with a last activity date. These patron records may be purged due to inactivity even though the patron is a “digital” resource user.
- SIP connection – required 2-factor authentication such as barcode and account. Examples are hoopla and OverDrive where patron authenticates with barcode and is also required to have an account with the content provider.
  - IP authentication within library is another variation of SIP connection; database access within the library range is valid without library barcode/account verification
- OpenAthens
  - SAML – uses for resources/vendors who are part of the OpenAthens Federation (<https://openathens.org/content-providers/membership/>) transfer of data is done via XML
  - Proxied – an IP address is associated with the library's proxy which is identified to vendors. Robin works with OpenAthens to set up the proxied IP for each library. OpenAthens also maintains a list of proxied services maintained (<https://www.openathens.net/resources.php?oap>). Each library has a specific proxied IP which is used consistently for all proxied content. Adding new vendors/resources does still require Robin/SWAN working with OpenAthens to create the proxied link to the resource. A list of SWAN libraries OpenAthens proxy IP numbers is available on the SWAN Support Site listed as part of work completed for setting up OCLC services (<https://support.swanlibraries.net/node/66643>). The OpenAthens IP is consistent for each library across all their proxied resources.
  - IMPORTANT: Any time a new resource is added, the library need to contact SWAN so that it can be added to OpenAthens.

We also shared some troubleshooting tips related to hoopla which highlighted the vast collection knowledge the group has. These types of specific one-off/odd troubleshooting challenges may be valuable to discuss in the forums so that we can share knowledge/tips.

A question was raised on what patrons know and how they get started. Do they understand when we tell them they need an app to access the content? Generally, yes. Oak Lawn is putting together a script to help patrons. They are starting with the question “Where is your library card from?” First we need to know if content is available to that patron – given the number of reciprocal borrowers, this baseline question is critical.

V. EBSCO (30 minutes)

Robin shared the journey of getting to the EBSCO group contract offering. Robin has been working for over a year in trying to negotiate group licenses with vendors. Vendors approached either did not want to provide group licensing as it is more beneficial for them to license on a per library basis, or they did not want to offer the content libraries were most interested in.

Robin has been working with Leila Heath, RAILS since June 2019 on cooperative collection development and licenses for all SWAN libraries. The SWAN-wide license negotiated includes RAILS Package B (17 databases, 13 core + 4 selected by the library) for all 92 SWAN public libraries. Academic, school, and special libraries are not included in this license due to the differences in EBSCO management of licensing based on library type.

This consortium license for EBSCO Package B has been presented to the SWAN Board, Committee of the Whole, and will be presented for approval at the March 5<sup>th</sup> quarterly. Details are available in the SWAN packet for the March 5<sup>th</sup> Quarterly Meeting ([https://support.swanlibraries.net/sites/default/files/meeting/20\\_03\\_05/66906/packet2020-03-05.pdf](https://support.swanlibraries.net/sites/default/files/meeting/20_03_05/66906/packet2020-03-05.pdf) pages 33-37).

Shared tutorials will be available on the patron website which is linked from the Enterprise catalog. Libraries are encouraged to link patrons to these resources directly and reuse content, as desired.

Once approved, Robin will manage all IPs, access, and licenses within ArticleSearch. They will also provide consortium-wide statistics and help libraries collect their own stats from the EBSCO admin portal. Robin will work with libraries who currently have EBSCO licenses which extend past June 30, 2020 to coordinate product extension. Selection of optional content will also be coordinated by Robin with a deadline of May 15<sup>th</sup>.

Robin encouraged all to register for their *Article Search and EBSCO Discovery Service for Reference Support* online workshop on April 22 (<https://www.librarylearning.info/events/?eventID=30592>). A past recording of this workshop is also available (<https://support.swanlibraries.net/tutorial/66819>) – but come to the live session on April 22!

VI. Next Meeting

Thursday, April 23, 2020, 1:30 PM – 3:30 PM (Burr Ridge) - Register on L2  
<https://www.librarylearning.info/events/?eventID=30268>

## Attendees:

1. Molly Bitters (Eisenhower Public Library District)
2. Abby Budzynski (Bloomington Public Library District)
3. Erin Damm (Villa Park Public Library)
4. Susan DeRonne (Glen Ellyn Public Library)
5. Amanda Ghobrial (West Chicago Public Library District)
6. Tony Lucarelli (Indian Prairie Public Library District)
7. Sue Pajor (Alsip-Merrionette Park Public Library District)
8. Terry Parker (Tinley Park Public Library)
9. Jane Piraino (St. Charles Public Library District)
10. Ang Romano (Oak Lawn Public Library)
11. Sarah Slack (St. Charles Public Library District)
12. Christine Sporleder (Bloomington Public Library District)
13. Carrie Straka (Itasca Community Library)

## SWAN Staff:

1. Dawne Tortorella, Assistant Director
2. Tara Wood, Manager, User Experience