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Biz of Acq — The Wiki of Acq

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Column Editor's Note: While Library 2.0 technologies are just beginning to change the way we work, *Xan's* article spells out how a **wiki** can be successfully used to provide convenient access and good control over Acquisitions procedures. *Xan's* article is very timely for me, as my library is beginning discussion on better facilitating and communicating policies and procedures via an intranet, and USMAI's (University System of Maryland and Affiliated Institutions) Acquisitions/Serials Group is working toward developing and expanding training documentation on a **wiki**. *Xan's* experiences will be helpful to anyone involved in such endeavors. — MF

The Problem

The Acquisitions Department had been maintaining a Website on the main **Stanford Libraries** site for years using a standard Web development tool, but increasingly there were problems. As managers and authorized staff changed procedure documentation and uploaded it to the site, older versions of other pages would overlay the most current documents and links would be broken. There were too many procedures for one person to maintain, but the number of people involved multiplied the chance of unwanted changes. The process of changing a document and uploading it correctly made small changes take extensive amounts of time, so the procedures inevitably became outdated. The interface was awkward. The ordering staff looked for procedure documents by scrolling down a long page of links. When, as often happened, a procedure applied to more than one category, it was listed twice, once under each heading. This just made the list longer and less manageable. Separate from the Website, each Acquisitions unit also maintained folders on a shared server for meeting notes and miscellaneous documents.

This situation was unacceptable for an Acquisitions Department of fifty people, working with a library materials budget of over 15 million dollars. **Stanford Libraries** have more than 30 subject selectors working in separate buildings from Acquisitions, and an operation of this size and complexity creates a great need for communication and standardization of procedures.

Maybe a Wiki?

When our IT manager, **Deni Wicklund**, suggested moving procedure documentation to **Consul**, the **Stanford** installation of **Confluence**, an enterprise **wiki** program from **Atlassian** (<http://www.atlassian.com/software/confluence/>), one of my first concerns was permissions. As the manager of a ten-person Acquisitions ordering unit, I worried that

moving my unit's procedures to a **wiki** would mean that my staff would be constantly changing and adding to the procedures in their own particular styles, without giving me the chance to make sure the changes worked with the other acquisition units.

It wasn't until I fully understood **wikis** that I accepted **Deni's** suggestion. I realized that a **wiki** is a tool for quick editing of documents, not necessarily for large group collaboration a la **Wikipedia**. It didn't have to be a site for all staff to change procedures at will. It could be a place for a user-friendly menu of documents that could be edited by the unit managers when needed. A change in the **wiki** takes only seconds and managers can see each other's changes.

Soon I was obsessed. **Confluence** provides both a rich text editor and a **wiki** markup editor, and it was the **wiki** markup that drew me in. I was able to add long procedures with many screenshots in a few minutes. In only a couple of weeks, I had moved most of the ordering unit's procedures to the **wiki** and wrote several new procedures of my own. The unit meeting notes also could be added to **Consul** with a quick cut-and-paste and this meant that staff now had a single place to find both documentation and notes from the meetings where these procedures were discussed.

Permissions were easy and granular enough to accommodate multiple levels of access. My supervisor and I could create and edit procedures, my staff could post comments to procedures but not edit them, and the whole **Stanford Libraries** staff could view the procedures for reference.

Confluence provides the opportunity to create multiple **wiki** "spaces" within a single installation of the program. The set-up of each **wiki** space is different within Acquisitions and the **Stanford Libraries** as a whole, according to the style of the manager who created it. One of the most important issues for me when setting up the ordering unit space was ease of use. Attaching new pages to your home page means they are "child" pages and **Confluence** provides an automatically generated list at the bottom of each page of all the attached child pages. Although this list is alphabetical, it can quickly become long and hard to navigate as you attach more procedures. Instead, I created category pages that allowed me to split our documentation into broad subject groupings. I created links to these category pages on the homepage, rather than depending on the list of child pages for navigation. Each category page then has a list of related

documentation grouped into subcategories. This means the procedures can be navigated like a menu, allowing the user to drill down to the exact procedure they need.

Cross-linking within a space is easy, so in cases where the same document applied to multiple categories, I could quickly create appropriate links. **Confluence** also allows easy cross-linking between **wiki** spaces. As more library units move their documentation onto the **wiki**, I am able to create context around ordering work by linking our procedures to related documents from other units. One additional feature of **Consul** is the facility to link information using tags, or "labels." This has allowed me to bring together procedures and the notes from unit meetings that discussed that procedure by tagging each document with relevant keywords.

What are the Advantages?

So, how does using a **wiki** affect the work of acquisitions? The process of purchasing library materials is changing rapidly as new forms of media and electronic resources enter the market. Publisher deals and consortial arrangements add another level of complexity because otherwise simple purchases may be affected by larger agreements. Having a set of procedures that can be quickly changed to reflect the latest information means Acquisitions staff has a dependable resource for their work.

Another major advantage is the increased level of investment possible in the **wiki**. Staff are able to post comments on procedures, to ask questions and to add information. Since uploading procedures is so easy, I have asked staff members to write new documentation for some of the less common processes and made sure that their names are listed as authors in the **wiki**. Detailed lists of the best vendors for each material format and geographic region have never been put online for staff use because of the time required to create these lists and keep them updated. The move to the **wiki** platform has made these lists possible and ordering staff members have contributed effectively to this effort.

But do the Staff like it?

The ultimate test of success for the ordering **wiki** was the response of staff. Did it make it easier for them to do their work? To find out, I asked my staff members to fill out a brief anonymous survey and let me know exactly what they thought about the new documentation. Of the eight respondents, six said they "Definitely prefer **Consul**" to the former Web-based procedures, and the remaining two said they "Somewhat prefer **Consul**." Six of the eight replied that the move to **Consul** had "helped their

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work a lot,” one said it had helped somewhat, and one said it had had no effect. This consensus is remarkable because the common opinion is that library staff tends to be resistant to change, making a 2.0 tool like a **wiki** hard to implement successfully. Only a few months after the move to the **wiki**, our staff unanimously preferred it to the former documentation.

As part of the survey, I also asked the ordering staff to write in their opinions of the advantages and disadvantages of the **wiki**. Interactivity, such as the ability to add comments and suggestions, was frequently listed as an advantage. The other benefit cited by several staff members is the clear linking within the **wiki** to other departments’ Websites. One respondent wrote the best thing about the **Consul** procedures is “having other units’ procedures ‘up front’ and available.”

The main disadvantage mentioned by respondents was searching. Staff members wrote they wanted to be able to search by keyword. This is possible in **Confluence**, but not immediately obvious. There is a search box that searches across all “spaces” within **Stanford’s** installation. After an initial search, you can limit results to a particular space. The labeling I have done to link documents within the ordering space is another option for searching. The staff response on this subject shows a need for more training in **Consul** searching.

The Future

The consensus of the ordering staff was that a **wiki** platform for the unit’s procedures was beneficial to acquisitions work. Procedures are kept current and we save managerial time with a tool that allows quick and easy Web updating. Since the creation of the ordering space, I have trained the managers of the other units within our Acquisitions Department to create and populate **Consul** spaces. At this point, every Acquisitions unit is in the process of transitioning to the **wiki**, and many other groups in the **Stanford Libraries** are creating spaces as well. Ultimately, as we standardize the tools we use for documenting procedures across the libraries, we will enable better cross-linking between units and as a consequence, a better and broader understanding of library processes. 🌱

discipline. The committee was caught between trying to do the right thing — which included explaining why a title was being canceled and conveying thoughtfulness, regret, and offers to find other libraries that subscribe — and simply conducting its business in a vacuum, inside the library and outside of the **Pratt Institute** community. The acquisition of full-text, multidisciplinary databases seriously improved the availability of journal articles in subjects like history, cultural studies, and literature.

At the time of the author’s departure from the **PIL**, the committee had nearly exhausted potential cancellations. The process of selecting new titles will become more difficult now that the collection of currently received titles has been so well tuned and shaped. It is inevitable, however, that numerous titles — even popular ones — will become defunct. Money may be freed up as a result. It is also possible that the budget will be increased due to patron satisfaction and interest in the periodicals, many of which are available exclusively in the print format. 🌱

Standards Column — Electronic Resources: Challenges and Opportunities

by **Todd Carpenter** (Managing Director, NISO, 1 North Charles St., Ste. 1905, Baltimore, MD 21201) <tcarpenter@niso.org> www.niso.org

The management of digital resources has never been an easy process. The rapid expansion of digital resources compounded with changing formats and sales models in the short life of Web-based delivery systems has particularly made the management process more complex. Further, from the very beginning, details relating to purchasing, licenses, access, and usage have been kept in ad hoc systems built by in-house teams or by the individual librarian needing to organize her workflow. It is hard to recall the days when digital resources played only a minor role in library management discussions.

It is from these very humble beginnings that a fairly robust community of vendors and librarians developed an entirely new type of library system — the **E-Resource Management System (ERMS)**. There are now several vendors providing more or less integrated **ERMS** services. The most dominant vendors of these systems are **Ex Libris**, **Innovative Interfaces Inc.**, and **Serials Solutions**. There are also community-developed projects such as **Colorado Alliance’s Gold Rush** systems as well as open source systems, such as **HERMES** at **Johns Hopkins University**. In addition, there are likely dozens (or more) home-grown systems that librarians are using to address complex management details. Even without a formal system in place, however, nearly every library is dealing in its own way with the acquisition, license, title, integration, and usage data information that accompany digital content.

NISO held a two-day seminar in Denver during September to bring together systems vendors and a diverse cross-section of librarians who are at different stages in the process of implementing a formal **ERMS**. It became apparent that these systems are relatively early in their development and deployment, despite some successes. Approximately one-third of the attendees had an **ERMS** in production, while the balance of the participants were either just implementing one, in the process of acquiring one, or still considering whether to purchase an **ERMS**. During this event we also learned that only about 400 institutions have functioning systems in development or production nationwide. Among the issues that were discussed at this forum were the role of **ERM** systems in the library; the **ERMS**

relationship to and interoperability with the standard **ILS**; which functionalities were most critical for adoption and use; and some of the barriers to implementation that have been experienced by the attendees.

When considering the amount of funds invested in electronic resources, the anecdotal indication from the group that gathered in Denver is that not nearly enough staff resources are being dedicated to the **ERM** acquisition and content-management lifecycle. Among **ARL** libraries, the average percentage of materials budget spending on electronic resources in 2005-06 is 42%, or nearly \$3.6 million, with the highest percentage being 73%. This expense amount is up 20% from the year before. The median percentage is up 5%. Despite this growing trend, we learned that even at some of the largest institutions, where annual acquisitions investment for electronic content is in the millions of dollars, fewer than five full-time staff are responsible for the full management of electronic resources and their acquisition lifecycle. Compared to the staff resources dedicated to managing the print material acquisition and management process, the e-resource **HR** investments seem modest. Obviously, every institution could use more staff, but the relative investment in print compared with the growing investment in digital content will necessitate changes in staff allocation that go well beyond the scope of having a system that manages these resources.

Perhaps the lack of staff resources is part of the reason that a relatively small number of the **ERMS** that have been purchased are up and running, or producing the anticipated results. To effectively populate, manage, and use these systems a significant time investment and significant shifts in organizational culture are required, steps that many institutions have yet to make.

One barrier to adoption that was discussed was the complexity of the problems that **ERMS** are trying to address, compounding the difficulty of rolling out such a system. Larger issues such as adapting workflows, restructuring staff resources to manage digital content, and systems interoperability with existing management tools were also pointed out as causes of delayed implementation. The sheer scale of the volume of data

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