Automation is Live! Christopher Newport University, OCLC, Project MUSE, and Wiley Partnerships Using KBART Holdings Automation to Streamline Workflows

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Abstract

In this session, presenters from Christopher Newport University, OCLC, Project MUSE, and Wiley discussed knowledge bases and related tools (KBART) holdings automation to streamline electronic resources workflows. KBART Automation reduces manual and tedious tasks performed by electronic resources management personnel, allowing additional time for enhanced management and maintenance of electronic resources. This presentation highlighted library, publisher, and vendor perspectives and emphasized how they all come together to streamline the management of electronic resources.

Keywords: KBART, automation, electronic resources management, vendors, libraries, publishers

The presentation provided the librarian, publishers, and vendors perspectives in the knowledge bases and related tools (KBART) automation process which aims to simplify the electronic resources management workflows by reducing tedious and manual management tasks thereby providing additional time for other tasks to be completed.

Steve York, a catalog librarian, from Christopher Newport University, provided the librarian's perspective. Steve noted that his university acquired a lot more e-books over the years and that his administration wanted to make e-books easily discoverable. Records were often of poor quality with erratic workflows. Hence, the KBART automation process allowed for records to be updated as directed by the institution's requirements. Steve noted that even with the automation process, he still checks a sample of the records for quality. However, this automation process has allowed for increased access and discoverability of his institution's e-books.

Matthew Ragucci of Wiley and Matthew Treskon of Project MUSE addressed the publisher and vendor's perspectives respectively in this KBART automation process. The KBART automation working group first met in 2017 and published their recommendation in 2019.[1] Ragucci noted some valuable takeaways included reduced manual workload, increased usage of electronic resources, and reduced troubleshooting errors. For Wiley to become compliant with the KBART automation process, they worked with OCLC to conduct numerous tests. One consideration was to make sure that the end dates provided in KBART reports for journals were open for journals that are still open/active.

A future goal of the presenters is to have a wider adoption of the KBART automation process with more vendor partners. This can be done through communication to build trust and address various pain points. Metadata is crucial to discovery and access but remains a pain point for all parties involved. Metadata needs to be enhanced by

publishers and vendors. This includes better tracking of journal history, post-cancellation rights, and perpetual access for e-books.

Matthew Treskon of Project MUSE discussed the challenges faced by librarians. One such challenge is the selection of the right collection in the Integrated Library System for the library based on their purchases and subscriptions. For example, Project MUSE provides KBART for both custom collections and evidence-based collections which often makes it difficult to select for the library. With the help of OCLC's WorldShare Collection Manager, libraries can now use KBART automation to select their institutions' unique titles thereby reducing the manual workload. Project MUSE is set to test this process with Ex Libris during the Summer of 2023 with the expectation that it will be live by the end of the year.

Finally, David Whitehair of OCLC gave the vendor perspective of this process. David noted that KBART automation addressed speed of updates and accuracy of WorldCat Holdings, MAchine Readable Cataloging (MARC) records, and uniform resource locators (URLs) in discovery services. This can all be set up once the library chooses to do so. Wiley, Springer Nature, Elsevier, Project MUSE, JSTOR, and Taylor & Francis have all adopted KBART automation. Cambridge University Press, Oxford University Press, and SAGE are listed as future partners.

Summary

At the end of the presentation, there was time for questions and answers. Matthew Ragucci of Wiley clarified that Cochrane Systematic Reviews is included in the Wiley KBART file. Wiley also includes consortium and local library collections in their KBART files, but this may vary by publisher.

The presenters concluded that there needs to be more buy-in and adoption of the KBART automation process by all parties to facilitate additional standardization. This presentation helped educate

attendees on the current status of KBART automation, including what is working, challenges, and issues being addressed.

Contributer Notes

Steve York is Catalog Librarian at Christopher Newport University, Newport News, Virginia, United States.

Matthew Ragucci is Director of B2B Product Marketing at Wiley, Hoboken, New Jersey, United States.

Matthew Treskson is Metadata Strategist at Project MUSE, Baltimore, Maryland, United States.

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Note

1 NISO, *NISO RP-26–2019, KBART Automation: Automated Retrieval of Customer Electronic Holdings*, (NISO, June 18, 2019), https://www.niso.org/publications/rp-26-2019-kbartautomation.