Electronic resources management systems: overview and latest trends (ERM Part II)

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Unisa Library

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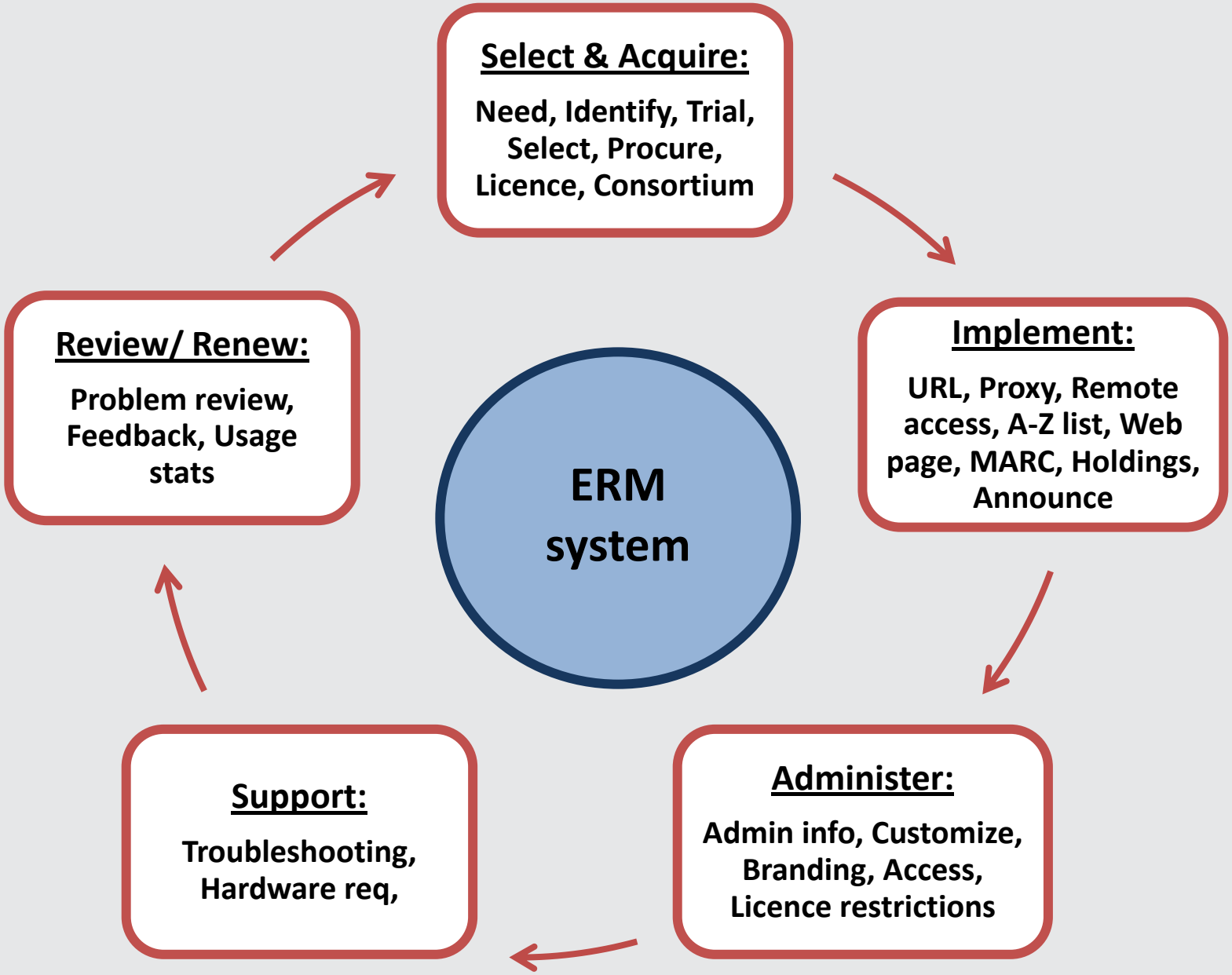
Select & Acquire:
Need, Identify, Trial, Select, Procure, Licence, Consortium
Implement:
URL, Proxy, Remote access, A-Z list, Web page, MARC, Holdings, Announce
Administer:
Admin info, Customize, Branding, Access, Licence restrictions
Support:
Troubleshooting, Hardware req,
Review/ Renew:
Problem review, Feedback, Usage stats
ERM system

Reminder - ERMS - from then to now

- Digital Library Federation Electronic Resources Management Initiative (DLF ERMI 2):
  - http://old.diglib.org/standards/dlf-erm02.htm
  - Functional system requirements
  - Data dictionary of e-resource elements
  - Workflow chart
  - Entity relationship flowchart
- Goals and deliverables:
  - Data standards – develop & review
  - Licence language mapping
  - E-resources usage statistics standards
  - Coordinate further ERMI work with NISO & other related org - standards

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Why ERMS

- The carrot
  - Integrated with LIS
  - One information point for all info about e-resource
  - Enable communication about e-resource
  - Paperless office
  - Elimination of duplication
  - Will support the e-resource life cycle
- Disappointments
  - Development curve for some systems
  - Take-over and discontinuance of products

The reality

- Effort and time required to start
- Only integrated with own family of LIS
- Strengths:
  - Administrative information
  - Licence information & management
- Impact on staffing issues and workflow

- E-resources developing faster than the ERM systems

ERM Systems

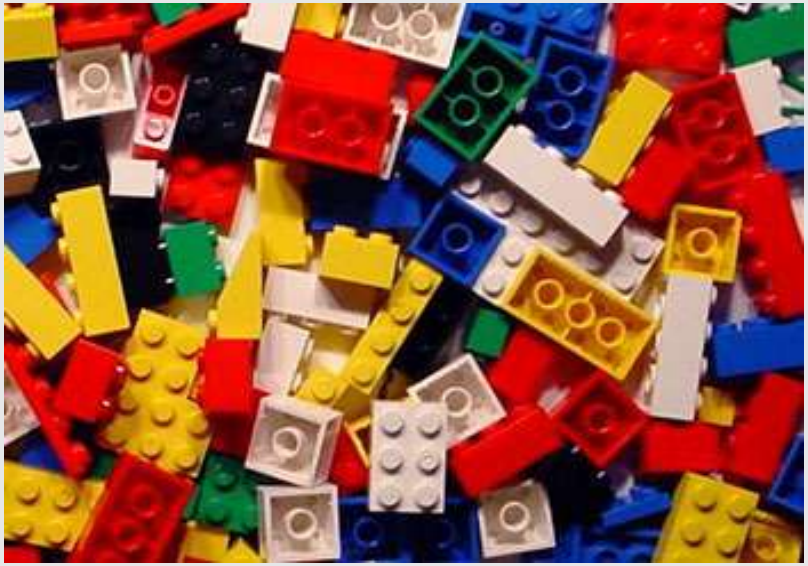
Commercial

- Millennium ERM
- SerialsSolutions - 360 E-Resource Manager
- EBSCOHost - ERM Essentials
- Ex Libris - Verde

Open source / in-house

- ERMes (Univ of Wisconsin – La Crosse)
- CORAL (Notre Dame Univ Library) http://erm.library.nd.edu/
- Kuali OLE http://kuali.org/ole
- CUFTS (Simon Fraser University)`

Why standards?



- We are all building things
- Not the same
- Not using the same building blocks
- Keep on building
- Use new blocks

If we all agreed about everything in the first place, we would not need standards

Standards help us to:

- Not re-invent the wheel
- Benefit from shared experience – build together
- We have a shared understanding
- Systems speak a common language
- MARC, AACR2, EDIFact , & Dublin Core

Standards for further development

- ERM Data Standards & Best Practices Review Group
- COUNTER (http://www.projectcounter.org)
- SUSHI
- ONIX-PL (EDItEUR)
- KBART (NISO / UKSG Knowledge Base and Related Tools)
- IOTA (Improving OpenURL's through Analytics)
- CORE (Cost of Recovery Exchange)
- SERU (Shared Electronic Resource Understanding)
- I^2 (Institutional Identifiers) Workgroup
- PIE-J (Presentation & Identification of E-Journals)
- TRANSFER Code of Practice

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Related standards

- RDA (Resource Description & Access)
- DOI (http://www.doi.org)
- JATS (NLM Journal Article Tag Suite) (NISO)
- E-PUB 3.0 (http://idpf.org/epub/30)
- DAISY 3 (Digital Accessible Information System)
- NISO Circulation Interchange Protocol
- ESPreSSO (Establishing Suggested Practices Regarding Single Sign-On) (http://www.niso.org/workrooms/sso)
- PRISM (Publishing Requirements for Industry Standard Metadata) http://www.idealliance.org/specifications/prism/)

ERM Data Standards & Best Practices Review Group (NISO)

- Gap analysis re ERM related data, standards and best practices from DLF ERMI report of 2004
- Working group consists of e-resource librarians, reps from LIS (Millennium & SerialsSolutions)
- Review of ERMI data dictionary (DLF ERMI report)
- Mapping of data elements to relevant standards
- Identify areas of best practice & areas of further interest:
  - Cost of usage
  - Consortial needs and applications
  - Electronic books

KBART

- Knowledge Base & Related Tools
- http://www.niso.org/workrooms/kbart
- http://www.uksg.org/kbart
- Joint Workgroup of NISO and UKSG
- Recommend best practice for smoother interaction in the knowledge base supply chain
- Quality of OpenURL's & link resolvers = knowledge base
- First report published in Jan 2010

ONIX-PL (EDItEUR)

- ONIX for Publications Licenses
- http://www.editeur.org/21/ONIX-PL/
- Support licensing of e-resources between publishers and academic & corporate libraries
- XML formatting for communicating license terms to an ERMS
- Flowed from recommendations in the DLF ERMI report (2004)
- Formalised in 2008

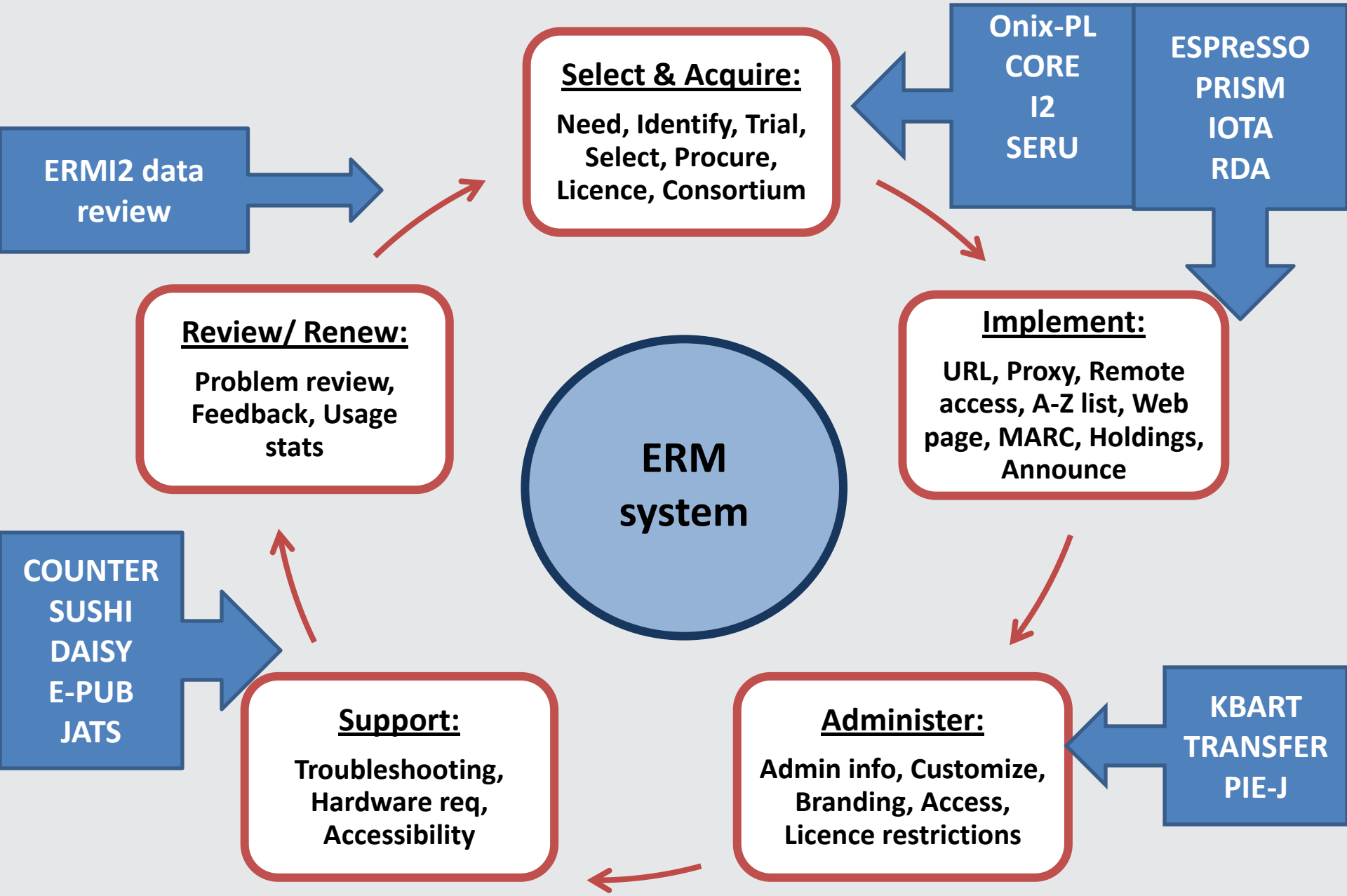
SERU

- A Shared Electronic Resource Understanding
- http://www.niso.org/workrooms/seru
- http://www.niso.org/publications/rp/RP-7-2008.pdf
- Approved in 2008, still in limited use
- Mutual agreement between publisher and subscribing institution
- In place of signed license, but not a click-through
- SERU tagged license uploaded directly into ERMS license description section

TRANSFER Code of Practice

CORE

- Cost of Resource Exchange Protocol
- http://www.niso.org/publications/rp/RP-2010-10.pdf
- "Defines an XML schema to facilitate the exchange of financial information related to the acquisition of library resources between systems. The two systems may be within the same organization, e.g., an ILS and an ERMS, or from two different organizations, e.g., a subscription agent and a library"
- Published as a recommended practice in August 2010
- Now available to system developers to develop and implement an XML schema for exchange of data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Troubleshooting, Hardware req, Accessibility
Administer:
Admin info, Customize, Branding, Access, Licence restrictions
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TRANSFER
PIE-J

Next generation ERMS

- What e-resource librarians want:
  - Workflow & communications management
    - Resource tracking, reminders, routing workflow, notifications
  - License management – storage, display terms
  - Statistics management
  - Administrative information storage
  - Acquisitions functionality
    - Budget management, financial reporting, invoicing
  - Interoperability across systems
    - Supporting data loads, interaction with ILS
  - Other: public display, collection evaluation, package management, holdings management, usability

Your participation

- Follow developments - online
- Register for news & updates – listservs
- NISO Webinars
- Make it part of your ILS discussions
- Example – cataloguing and RDA
- Should we organise ourselves in South Africa?

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