Electronic Resource Management Overview

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Library Technology Schema

Build on what you know

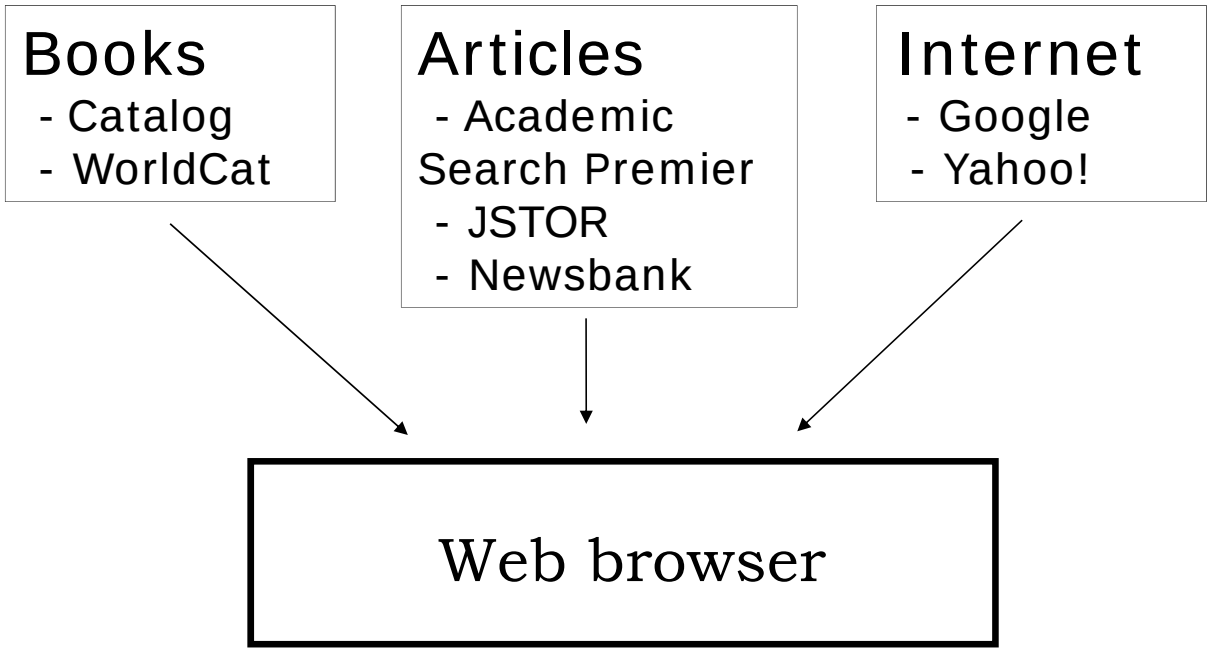
Resources

Books
- Catalog
- WorldCat

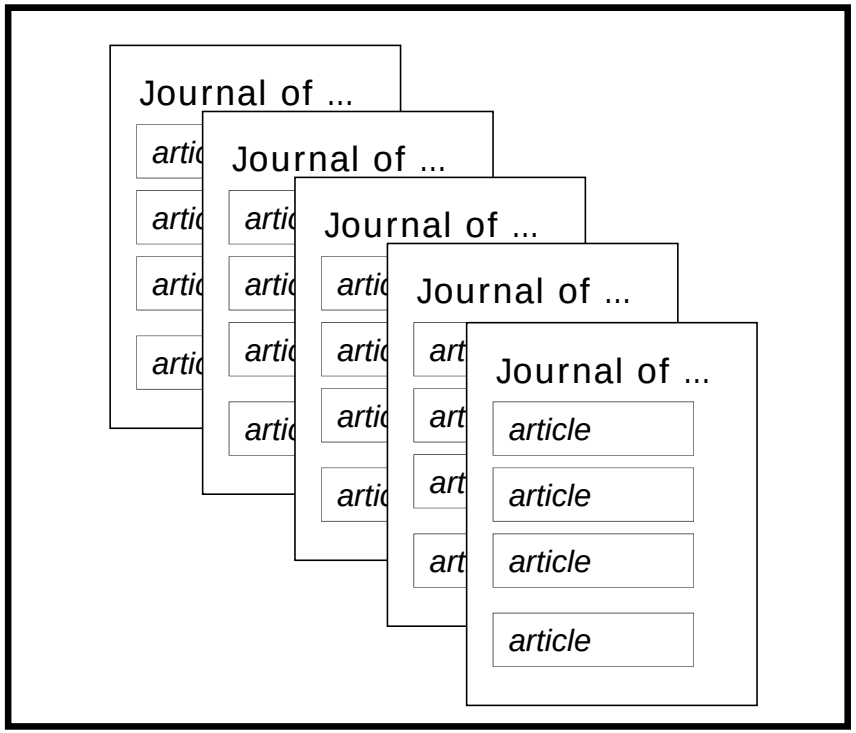
Articles
- Academic Search Premier
- JSTOR
- Newsbank

Internet
- Google
- Yahoo!

Accessing Resources

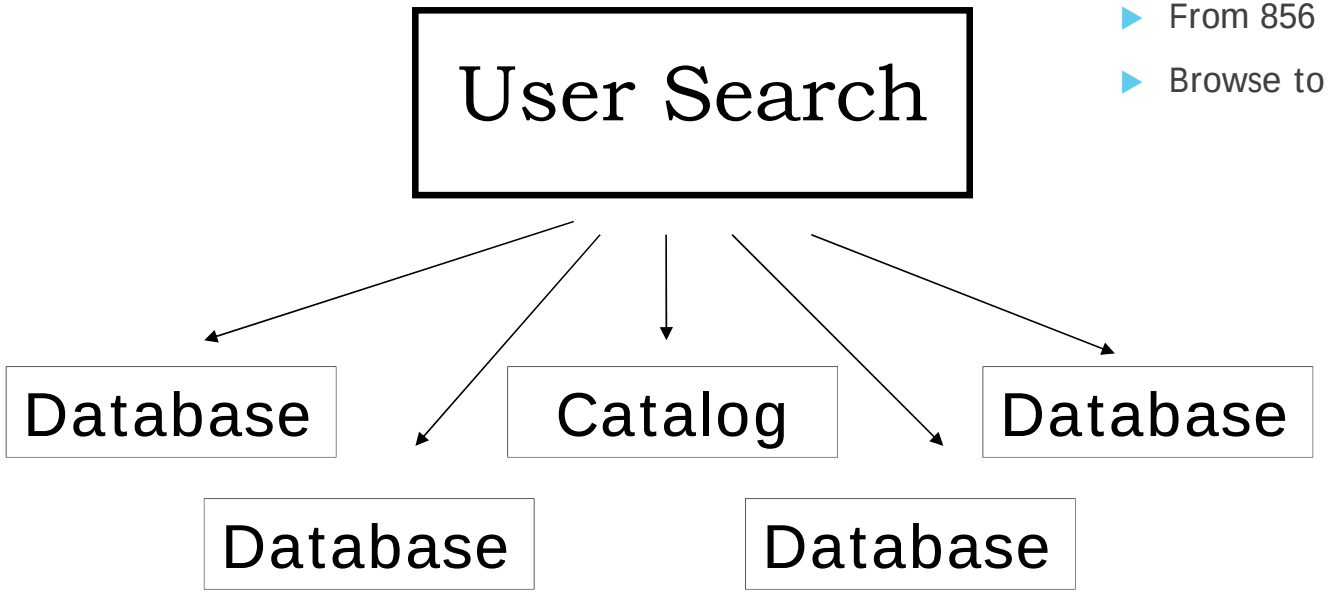


Database to Index Periodicals



Access to Electronic Content

- Direct searching of databases
  - Search each resource
- Title-level URL in OPAC
  - From 856 in MARC record
  - Browse to volume, issue, article



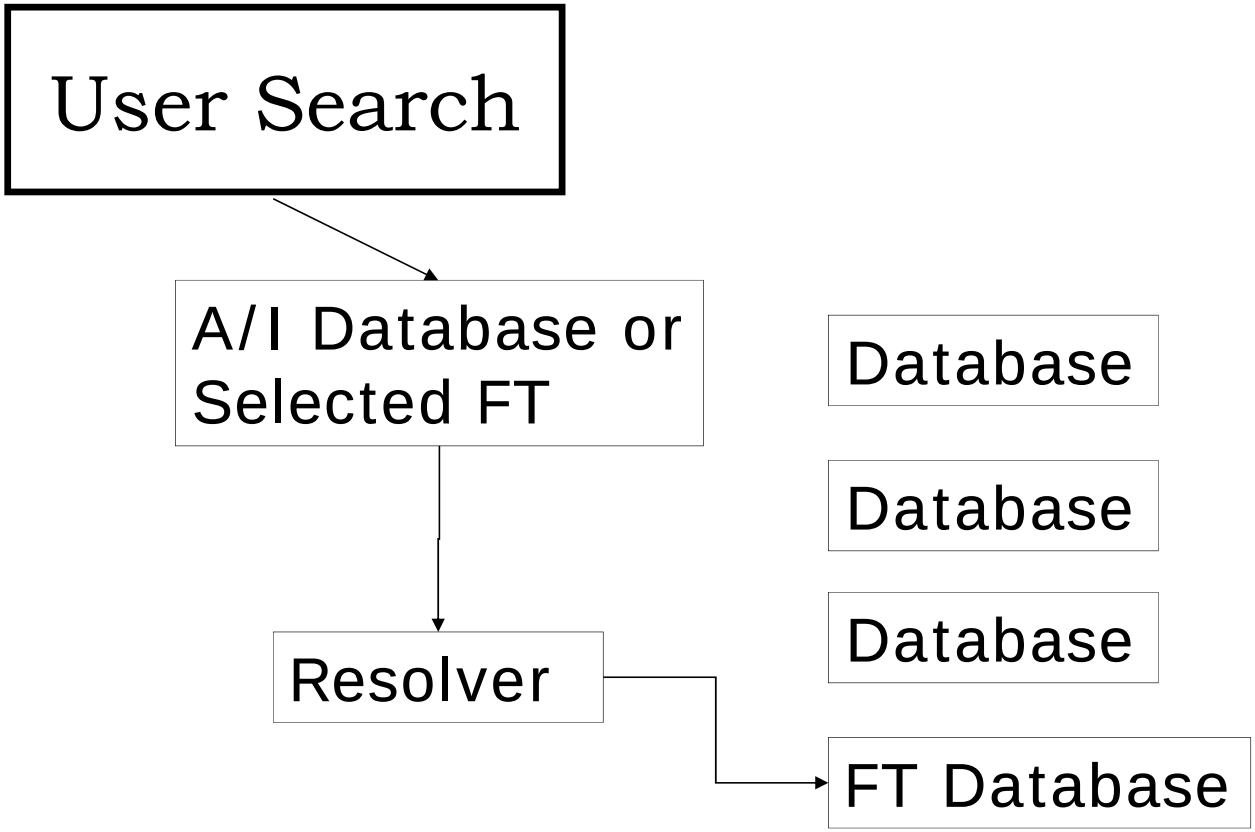
Knowledge Bases

- SerialsSolutions
- Journals A-Z list
- Coverage dates
- Links to journals

- SFX OpenURL Link Resolver
- Bought by ExLibris
- Links to appropriate copy of full-text resources

- These merged to be what we refer to as a knowledge base (KB)
- KB, Journals A-Z list, OpenURL Resolver, resolver → ALL SYNONYMOUS
- **The purpose is to provide access to full-text resources**

OpenURL Resolver

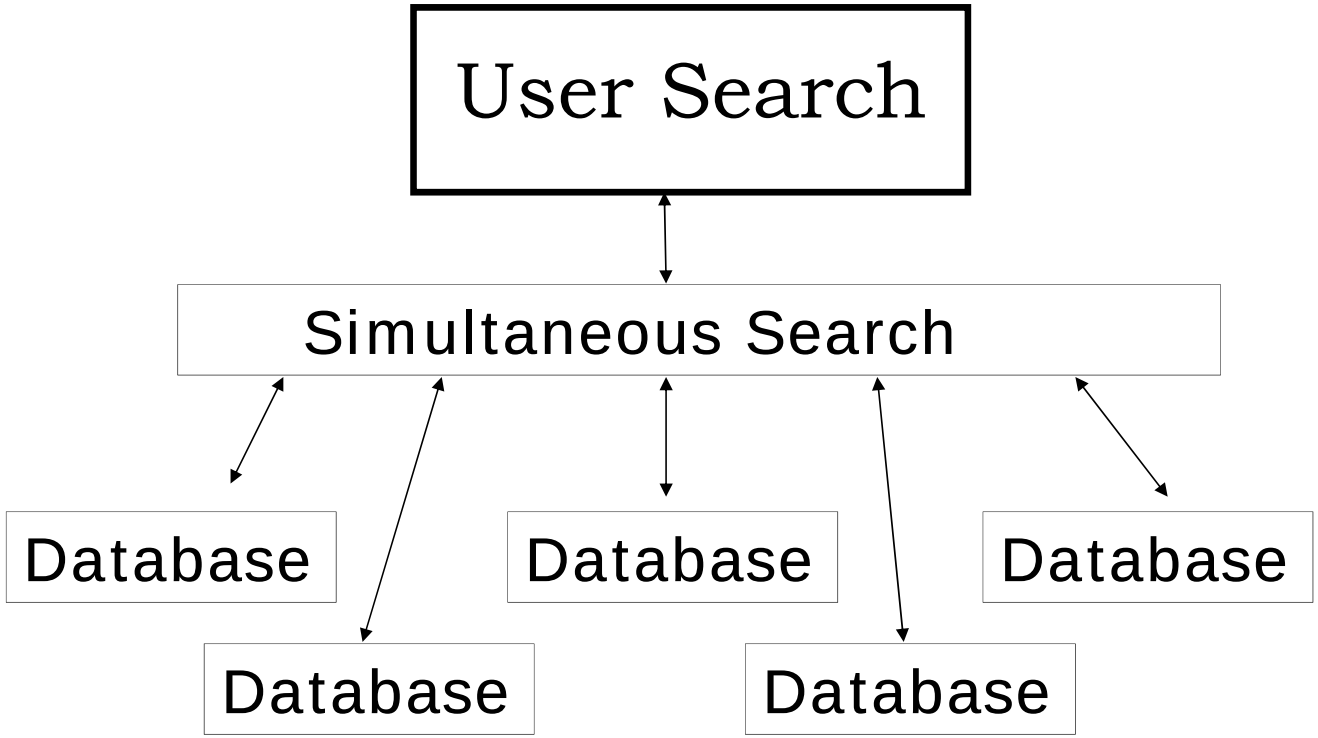


Authentication Timeline

An important but more straightforward aspect of our library technology schema

- Physical print items
- In-house workstations
- Credentials
- IP recognition
- Proxy
- Single sign on

Federated Search



Federated Search

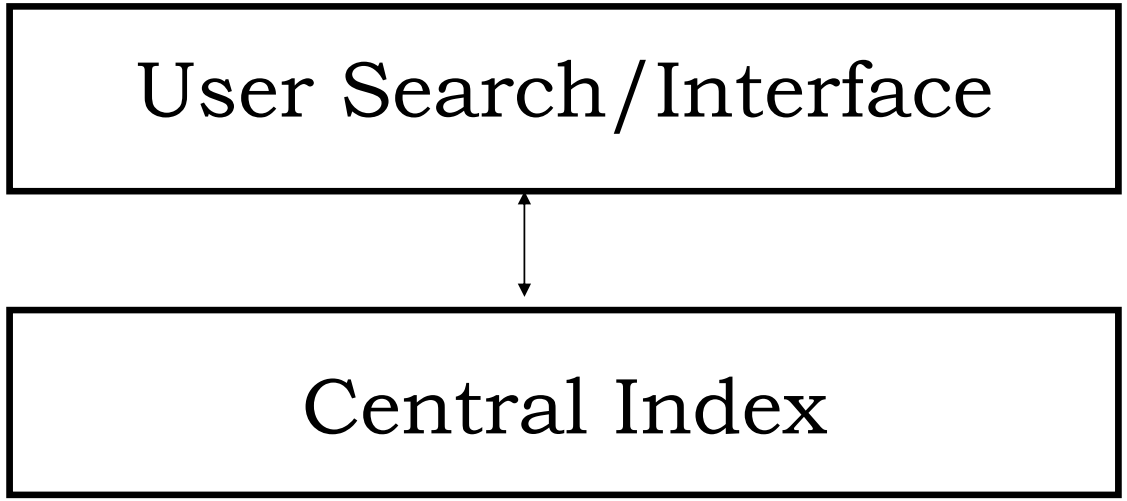
Products

- WebFeat
- Endeavor Encompass
- ExLibris MetaLib
- III Research Pro
- Serials Solutions 360 Search

Issues

- Connectivity
- Slow response
- Scalability
- Search complexity
- Duplication of results
- User interactions with result sets

Web-scale Discovery



Discovery Systems

Products

- Google Scholar
- EBSCO Discovery Service
- WorldCat Discovery
- ExLibris Primo Central
- SerialsSolutions Summon

Components

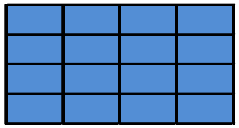
- Central Index
- User Interface

Discovery Central Index

Bibliographic data

From WorldCat bibliographic database

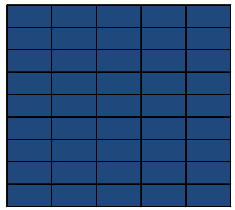
Licensed Content



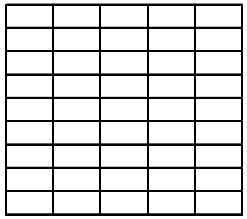
Central Index

Other Content

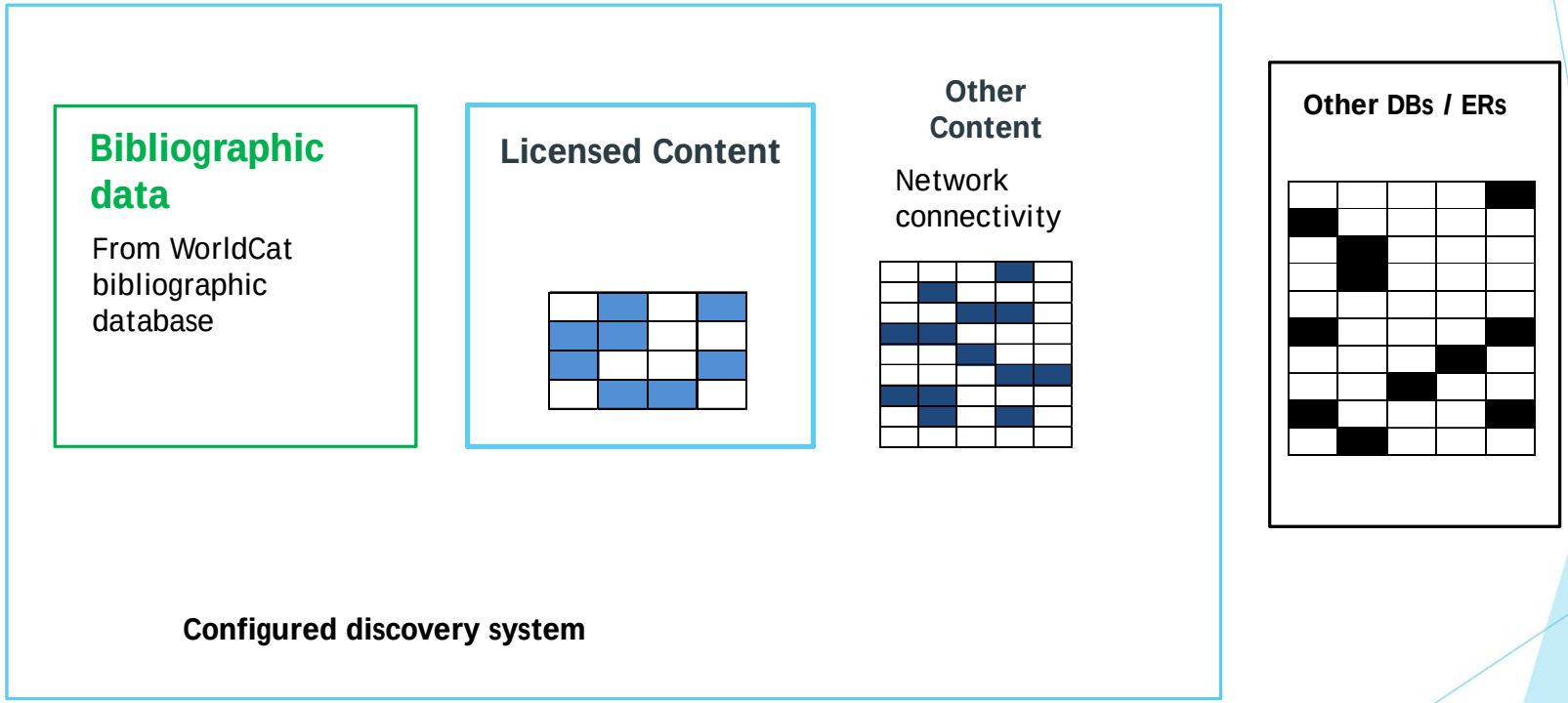
Network connectivity possible



Other DBs/ERs



Customized Discovery System



Schema Overview

Catalog

- Data
  - Bibliographic data in MARC and MFHD formats
- Links
  - Title-level URLs
- Purpose
  - Make bibliographic metadata available for searching

KB

- Data
  - Full-text resources & coverage
- Links
  - Resolver can create article-level links from title-level URLs
- Purpose
  - Provide links to full-text resources

Discovery

- Data
  - Central index with article-level eResource metadata & bib data
- Links
  - Links taken from bib & KB data and displayed with results
- Purpose
  - Discovery across all library resources

What it Looks Like in Practice

- ILS & OPAC
  - Local cataloging & management
  - Records from OCLC
  - Vendors
- Knowledge Bases
  - Journals A-Z list / OpenURL resolver
  - MARC record loading service for ebooks and/or ejournals
- Databases A-Z list
- External Repositories
  - Institutional repository
  - Image repositories
  - Other digitized collections
- Discovery Layer
  - Export bibliographic data from the ILS
  - Central Index = Article metadata for subscription and other content
- ERMS

Troubleshooting Electronic Resources

Users

May have issues not related to library systems

- Teachable moments
- Personal technology problems

Library Systems

Problem with one of many:

- ILS/OPAC
- KB
- Discovery system
- Ezproxy
- Other data or application silos

Resources

May have issues not related to library systems

- Errors from within vendor systems
- Accounting problems affecting access

ERMS Defined

- Jill Emery
  - "…any products or series of products that allow for a library to support the electronic resource provision to their end users" (Beginning to See the Light, p. 203)
- Marshall Breeding
  - "…a software module that assists the library in managing all the details related to its subscriptions to electronic content" (Helping You Buy Electronic Resource Management Systems, p. 7)

ERMS

- What it's not
  - A KB, though it uses KB data
  - Acquisitions, though it uses cost data
  - Usage stats, though may be able to load/use stats for analysis
- What is it?
  - Integrates holdings, cost, usage, and metadata
  - Administrative data (logins, URLs)
  - Licenses and license terms
  - Notes
  - ERM workflows, alerts

Moving Forward

Alma + Primo

The Systems

LSP = Alma

- Most similar to ILS
- Designed for multiple formats, not just physical
  - Including external repository content
- Integrated knowledge base and e-resource data functionality
  - Access, subscription, license, etc.

Discovery Service = Primo

- Replacing the OPAC
- Searches Alma bibliographic records
  - Physical, electronic, repository
- Searches central index metadata

New System = New Vocabulary

Portfolio

- KB metadata, minimal information about full-text resources
- Access information
  - Provider, URL, coverage/availability, ISXN, etc.

Electronic Collection

- Collections of portfolios
- Full-text collections

Database

- Abstract and index databases (no full-text content)
- No portfolios

Which Does What?

Alma = Access

- Electronic
  - Bibliographic records with URLs
  - KB with portfolios
  - External repository records
- **Alma doesn't know central index metadata, it only knows whether you have access to an ejournal/ebook.**
  Supports connecting to full text

Primo = Discovery

- Alma bibliographic records
- Primo Central Index
  - Article level metadata
  - Subscription and non-subscription content
- **Primo doesn't know what you own, it only knows what to search.**
  Supports finding library resources.

Where Do We Manage all this Stuff?

Institution Zone (IZ)

Local bibliographic records

Local bibliographic data

Electronic portfolios

Local external repository content

Network Zone (NZ)

Consortial bibliographic records

Other possibilities include:

- Consortial subscriptions
- Shared vendor records

Community Zone (CZ)

Bibliographic records

Authority records

KB data for electronic collections and databases

What Does it all Mean??

- Researchers aren't necessarily seeing library controlled data
  - Primo Discovery metadata is not the same as LSP bibliographic or portfolio data
- Many links to electronic content will be from the Alma KB
  - Managed by publishers
- Moving closer to a single search interface

What does it all mean??

- Streamlined processes are possible
  - Integrated KB = dynamic journal and database A-Z lists
  - Primo & Alma are linked
  - Integrated ERMS for admin, license term metadata, licenses, etc.
    - Licenses, vendors, and subscription management are connected and can be shared

Troubleshooting Electronic Resources

Users

May have issues not related to library systems

- Teachable moments
- Personal technology problems

Library Systems

Now the data and applications are more integrated

- Alma – bib & KB
- Primo – PCI & harvested data
- Ezproxy

Resources

May have issues not related to library systems

- Errors from within vendor systems
- Accounting problems affecting access

Questions??

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