Return of the ILS: consolidating the management of e-resources and the development of Innovative’s ERM module

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Session Overview

• Background to the ERM at UWA
• How the ERM has developed
• What is the ERM?
  - ERM metadata
  - ERM record types
  - Data structure
• Eholdings maintenance
• Integration with OpenURL and Portal
Background to the ERM at UWA

• Over 37,000 subscribed electronic journals

• Electronic resources are complex to manage
  - A range of pricing models
  - A variety of stakeholders Licensing conditions
  - Access and authentication issues
  - Varying titles lists

• Integrated Library Systems have been slow to develop tools to manage electronic resources
Background to the ERM at UWA

Systems developed at UWA to manage eresources included:

• Information Toolbox
• Catalogue records
• License and EzProxy spreadsheets
• Password information held on Library web pages
• Print filing cabinets
Background to the ERM at UWA

Problems with the eresource management systems:

- Maintenance of multiple systems
- Duplication of data
- Finding information about a resource was complex and confusing
- Limited potential for systems to link to each other
- There was still management information not being captured
- Relied heavily on manual processing
Managing electronic resources
How the ERM developed

Three main stages:

1. Data specification
   - synchronisation with DLF standards
   - http://www.diglib.org/pubs/dlfermi0408/

2. Scenarios

3. Testing
What is the ERM?

It’s a system that provides the ability to:

• Centrally manage metadata relating to our electronic resources
• Set email alerts
• Define hierarchical relationships between records in the catalogue
• Batch load electronic holdings information into the catalogue
# ERM metadata fields

## Over 90 new fields

<table>
<thead>
<tr>
<th>License</th>
<th>Access</th>
<th>Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorised users</td>
<td>Hardware/software</td>
<td>Contacts for key stakeholders</td>
</tr>
<tr>
<td>Terms of use</td>
<td>Links to support documentation</td>
<td>Usage statistics</td>
</tr>
<tr>
<td>Special terms</td>
<td>Resource advisory</td>
<td>Link to administration site</td>
</tr>
<tr>
<td>Links to digitised license documents</td>
<td></td>
<td>Incident log</td>
</tr>
<tr>
<td>Remote access</td>
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</table>
ERM Tickler

Allows Libraries to set email alerts to prompt Library staff when they need to action a resource in some way

Can be set at:
- Resource level
- General level
ERM records and data structure

- New record types:
  - Resource record
  - License record
  - Contact record
    - Access provider
    - Publisher
    - Copyright holder
    - Data provider
    - Consortium
Basic data structures

License record

Contact

Vendor

Order

Resource record

Resource record

holdings

Bibliographic record

holdings

Bibliographic record

holdings

Bibliographic record

holdings

Bibliographic record
Sample resource record
Sample bibliographic record with resource link
Eholdings maintenance with the coverage database

The coverage database has two functions:

- Builds the relationship between the resource record and its related titles
- It populates the 856 and eholdings data into the holdings record for each title related to a resource
Sample eholdings report

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<tr>
<th>Journal Title</th>
<th>ISSN</th>
<th>Start Date</th>
<th>End Date</th>
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</tr>
</tbody>
</table>
ERM will report if:
No matching bib record (new)
Title has not been updated in the coverage database (deleted)
Thankyou