

The Innovative Electronic Resource Management System: A Development Partnership

Diane Grover and Theodore Fons

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From the spring of 2002 to early 2004, Innovative Interfaces, Inc. worked with several libraries in a development partnership to create an electronic resource management (ERM) system. The new ERM system is designed to track licensing and purchasing information about electronic resources, define relationships among aggregators, publishers, or vendors and the resources they provide, and to selectively display information in the Web OPAC for public services staff and patrons. *Serials Review* 2004; 30:110–116.

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Management of electronic resources has many facets and challenges for libraries and vendors. Numerous conference presentations and journal articles describe the myriad problems from managing aggregator holdings to displaying license terms of use to patrons. In response to the new challenges, librarians and vendors alike have created both partial and comprehensive approaches to solving the problems.

In a recent article in *Serials Review*, Dalene Hawthorne summarizes the e-acquisitions process and points out the opportunities that accompany the challenges. Hawthorne notes that “*opportunities abound for vendors of integrated systems, subscription vendors, and other information businesses to become more involved in the management of electronic resources.*”¹ She also states that “*opportunities exist for librarians and others in related areas to become involved in managing access to, and metadata about, e-resources locally and to participate in standards or systems development (italics added for emphasis).*”²

What opportunities are presented when a vendor and a group of its customers partner to develop an integrated module to support electronic resources management? What challenges arise in such a project? This article reports on the development partnership between Innovative Interfaces, Inc. (Innovative) and several of its customer libraries from spring 2002 to

early 2004 to create an electronic resource management (ERM) system.

Libraries at a Crossroad

Since the late 1990s, electronic publishing has increased dramatically. Libraries have increased their purchasing of electronic resources and simultaneously increased the proportion of their collections budgets allocated to supporting electronic resources. During this period, a number of authors have reported on the growing complexity and problems with managing information about electronic resources, as well as emerging solutions.³ As the portion of collections budgets dedicated to electronic resources increases, so does the need to systematically support electronic resources through databases that provide a locus for management information related to staff and patron needs. These database functions range from producing reports to managing acquisition workflows and end-user access to publicly displaying terms of use.

Today libraries have reached a crossroad with two choices for how to proceed in managing electronic resources. Libraries can invest the human and financial resources required to develop a local system (including the implementation of an open source solution) or they can partner with an existing software provider to develop a commercial solution. Both approaches offer benefits to the library. The locally developed option offers complete customization and response to local requirements, while a partnership offers lower long-term costs and provides a solution that can be made available to a wide variety of libraries. Added to this cost/benefit analysis is

Grover is Electronic Resources Coordinator, University of Washington Libraries, Seattle, WA 98195-2900; e-mail: grover@u.washington.edu.
Fons is Product Manager, Innovative Interfaces, Inc., Emeryville, CA 94608, USA; e-mail: tfons@iii.com.

the question of integration with the existing library system. For some libraries, the problem of maintenance and training for multiple systems is critical to the issue of how to address electronic resource management needs.

As libraries considered these potential solutions, the issue of ERM terminology and functional requirements emerged. The most significant large-scale research effort to address the terminology and requirements is the Electronic Resource Management Initiative (ERMI), a project sponsored by the Digital Library Federation. The federation's ERMI grew out of research written by Timothy Jewell, *Selection and Presentation of Commercially Available Electronic Resources: Issues and Practices*⁴ and tracked in a Web site created by Adam Chandler and Jewell known as the "Web Hub."⁵ According to the DLF Web site, "this project will develop common specifications and tools for managing the license agreements, related administrative information, and internal processes associated with collections of licensed electronic resources."⁶

The DLF ERMI deliverables include functional requirements, entity relationships, data structure, workflow, and research into the possible use of XML as a markup standard, any or all of which could be used for the creation of an ERM system. Throughout the development stage of the Innovative ERM project, the development partner libraries used successive drafts of the DLF documents as external resources in defining their ERM system requirements.

Innovative's Start in ERM

In the period roughly from 2000 to 2002, a number of Innovative's large academic library customers decided that the option to partner with Innovative to develop an ERM system provided the greatest benefits to their libraries. Independently, these libraries had decided to partner with an outside vendor to develop a system or to replace their existing locally developed systems. They projected that one of the primary benefits of this approach would be the ability to incorporate electronic resource management tasks into their existing integrated library systems (ILSs).

During this period, Theodore Fons, a product manager for acquisitions and serials at Innovative, began discussing the issues related to electronic resources with librarians at professional conferences like the North American Serials Interest Group (NASIG), the American Library Association (ALA), and the Charleston Conference. These discussions revealed that electronic resources had far more components and complex relationships than the traditional serials and acquisitions modules could manage effectively. Equally clear from these conversations was that the development of an ERM system should take place within the ILS context.

In February 2002, University of Washington Libraries' administration invited Innovative's Chairman and CEO Gerald Kline to visit the campus and discuss pressing needs. One of those needs was a solution for managing electronic resources. After visiting and discussing the problem with several more libraries, Innovative invited

a team from Washington to Innovative's headquarters for a brainstorming workshop. This workshop took place in May of 2002 and focused on developing goals and a basic architecture for an ERM module that would fully integrate with the existing Innovative architecture and public interface.

Development Timeline

Innovative began the development partnership with the University of Washington Libraries in May 2002 and then added more partner libraries over the next several months. The partner libraries included Washington State University, Glasgow University (Scotland), Ohio State University, and University of Western Australia. Each development partner library submitted lists of desired data elements and functional requirements for Innovative developers to use. The libraries also provided "scenario" documents to give system designers a range of examples describing how librarians work with electronic resources. The libraries also referred to the draft DLF working documents as the starting point for much of this work.

By fall of 2002, Innovative installed a working prototype of the staff functions at the University of Washington, incorporating the data elements, fields, and functionality suggested by the libraries. In early 2003, ERM was installed at all the partner libraries and staff at the libraries began creating records to test the initial data elements and features and provide feedback to Innovative.

During the summer of 2003, the DLF ERMI Steering Group solicited feedback on its working documents. Three of the Innovative development partnership members served as members of a "reactor panel" to the DLF ERMI project: Trisha Davis (Ohio State University) and Diane Grover (University of Washington) served as "librarian reactors," while Fons (Innovative) served as a "vendor reactor."

Innovative's development partners continued to study the DLF documents and to suggest additions, deletions, and changes to Innovative's ERM. The DLF ERMI group provided prepublication drafts on several occasions to facilitate the ERM development. During the latter half of 2003, Innovative added several more libraries to what they now referred to as an "early beta" phase of development. Meanwhile, Innovative began developing the Web OPAC interface, updated its batch holdings and linking programs, and created a stand-alone version of the ERM. Innovative is conducting a full beta test phase in early 2004, and the module was generally released in March 2004.

Goals of the ERM Development Project

In the early phases of the Innovative ERM development, the development partner libraries articulated the goals adopted by the project. Some of these goals included integrating licensing and purchasing details using a single interface, streamlining workflows, eliminating the need to maintain separate spreadsheets and databases, and storing and selectively displaying information in the

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