<table>
<thead>
<tr>
<th><strong>Title</strong></th>
<th>DIY E-Resource Management</th>
</tr>
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<tbody>
<tr>
<td><strong>Author(s)</strong></td>
<td>Palmer, DT</td>
</tr>
<tr>
<td><strong>Citation</strong></td>
<td>Seminar Kebangsaan Sumber Elektronik di Malaysia, Penang, 5-7 December 2012</td>
</tr>
<tr>
<td><strong>Issued Date</strong></td>
<td>2012</td>
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<td><a href="http://hdl.handle.net/10722/176510">http://hdl.handle.net/10722/176510</a></td>
</tr>
<tr>
<td><strong>Rights</strong></td>
<td></td>
</tr>
</tbody>
</table>
DIY E-RESOURCE MANAGEMENT
ELECTRONIC RESOURCE MANAGEMENT (ERM)

WHY?
HKU, Library Resource Fund %, 2002 - 2012

- E-Resources: 74.54%
- Monographs: 16.88%
- Print Journals: 4.30%

Tail of the Dragon
HKU, Number of Materials. 2002-2012.

Print Journals
1,831

Print ser
ej titles

E-Journals
41.613

E-Books
3,481,589

Books
2,925,630
ERM – WHAT IS IT? (WHAT SHOULD IT BE?)

• Workflow management
• License management
• Statistics management
• Administrative information
• Acquisitions Functionality
• Integration with other systems
• Subscription management
• Public display
• Vendor contact information
• Etc.

INTEROPERABILITY / INTEGRATION

- MARC record service
  - Titles come and go
- Knowledgebase
  - Link resolver
  - Holdings update
- Public view
  - OPAC
  - A ~ Z list
- Access control
  - Authentication
  - Proxying
# SOLUTIONS: PROPRIETARY

<table>
<thead>
<tr>
<th>Product</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verde</td>
<td>Ex Libris</td>
</tr>
<tr>
<td>Millennium ERM</td>
<td>Innovative Interfaces</td>
</tr>
<tr>
<td>Web-scale Management Services</td>
<td>OCLC</td>
</tr>
<tr>
<td>EBSCONET ERM Essentials</td>
<td>Ebsco</td>
</tr>
<tr>
<td>ERM as a Service</td>
<td>Swets</td>
</tr>
<tr>
<td>E-Resources Services</td>
<td>Harrassowitz</td>
</tr>
<tr>
<td>Journal Finder</td>
<td>WT Cox</td>
</tr>
<tr>
<td>360 Resource Manager</td>
<td>Serials Solutions</td>
</tr>
<tr>
<td>TERMS Core ERMS</td>
<td>TDNet</td>
</tr>
<tr>
<td>Gold Rush</td>
<td>Colorado Alliance</td>
</tr>
</tbody>
</table>
## Solutions: Open Source

<table>
<thead>
<tr>
<th>Product</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Matrix</td>
<td>North Carolina State University</td>
</tr>
<tr>
<td>CUFTS</td>
<td>Simon Fraser University</td>
</tr>
<tr>
<td>CORAL</td>
<td>University of Notre Dame</td>
</tr>
<tr>
<td>ERMes</td>
<td>University of Wisconsin-La Cross</td>
</tr>
</tbody>
</table>
THE GOOD, THE BAD, & THE UGLY

“For instance, even as many librarians praised ERM systems for finally consolidating ERM-related data,

others emphasized that the data traditionally housed in the ILS environment—such as cost, fund, and vendor data—remains segregated from the ERMS without easy means for data transfer.”

-- Collins & Grogg, 2011
“Several librarians described the data within their ERM systems as static and only as good as their ability to maintain it. The increase in workload has resulted in increased staffing needs for many libraries.”

-- Collins & Grogg, 2011
“Librarians complained that they often end up piecing together manual workflows to accommodate ERM tasks.”

-- Collins & Grogg, 2011
THE PROBLEM

• Several overlapping menus & lists
• Different & overlapping platforms: CD ROMs & Web
• Different groups updating different menus & lists
• Different schedule for updating
• Broken links
• No one knew who to contact to fix each different menu & list
• ➔ ➔ A nightmare!
Main Menu

A) Networked CD-ROMs
B) Standalone CD-ROMs - Main Library
C) Standalone CD-ROMs - Law Library
D) Standalone CD-ROMs - Education Library
E) Standalone CD-ROMs - Music Library
F) DRAGONET (HKU Libraries Catalogue)
G) Exambase
H) World Wide Web
I) Quit

Enter
Information Navigation Menu

HKU Libraries Home Page
Standalone CD-ROMs (Main Library)
Network Printer Connection
Previous Menu

Video on the WEB
Standalone CD-ROMs (Law Library)
Unionway

DRAGON (HKU Libraries Catalogue)
Standalone CD-ROMs (Dental library)
SciFinder Scholar
Internet Resources

Architecture
- Architecture
- Real Estates & Construction
- Urban Studies

Engineering
- Engineering in General
- Civil Engineering
- Computer Science and Information Systems
- Electrical & Electronic Engineering
- Industrial & Manufacturing Systems Engineering
- Mechanical Engineering

Arts
- Chinese
- Comparative Literature
- English Literature
- Linguistics
- Fine Arts
- Geography & Geology
- History
- Japanese Studies
- Music
- Philosophy
- American Studies
- European Studies

Law

Medicine

Reference

Sciences
- Botany
- Chemistry
GOALS

• Content Management
  – One repository for the life of the content;
  – If data is entered in “place A”, let that be the only place it need be entered
  – Let existing workflows for print integrate with those for e-resources
INTEGRATED LIBRARY SYSTEM (ILS)

- Data was already entered in Acq, Cat, and Serials modules
- Database of record
- All other views could be derived from ILS
- => Multipurposing of data!

- Build from this:
  - A ~ Z list
  - Ezproxy file
  - Knowledgebase for link resolver
  - Statistics for Collection Development
MARC21 PROBLEMS

- URL should be in holding record and not bib
- Subfields in 856 not what we wanted
- 880 tags, Roman to Chinese, not good

245 00 |6880-01|aFang zheng Apabi shu zi tu shu xi tong |h[electronic resource] =|bApabi e-book
856 40 |uhttp://hku.lib.apabi.com|zClick to search the Database
880 00 |6245-01/$1|a方正Apabi數字圖書系統 |h[electronic resource] =|bApabi e-book
LOCAL TAG 996

- |a: Yes to include in A~Z list & EZProxy Config
- |e: Formats – books, directories, etc => 38
  - Tag 008, 245|h, or BCODE2 not enough
- |f: number of users allowed
- |g: for IP mounted titles – Remote access? Alumni? Distance education? Password control?
MORE OF 996!

- i: Roman? CJK? Or both?
- l: linkage <number> and 856|x <number>]
- m: Key title in Roman? CJK? Medical?
- n: displays note to public
- q: Interlibrary loan allowed?
- s: Broad subject area. Is it “core”?
- u: E-reserves allowed? Coursepacks?
- v: mobile devices
Example: “Journal of Med Engineering & Technology”
PASSWORD CONTROL

- Checkin record
- Public cannot see
  - For general users
  - For admin/statistics of titles

<table>
<thead>
<tr>
<th>C4732406</th>
<th>CHECKIN Information</th>
</tr>
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<tbody>
<tr>
<td>LABEL TYPE: n</td>
<td>COPIES: 1</td>
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<tr>
<td>SCODE1: s</td>
<td>CLAIMON: - -</td>
</tr>
<tr>
<td>SCODE2: -</td>
<td>LOCATION: int</td>
</tr>
<tr>
<td>XFIELD</td>
<td>Web Resources</td>
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<tr>
<td>CALL #</td>
<td>K1 C53 L41 A5</td>
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<tr>
<td>PFIELD</td>
<td>$$ahkulawlib//uni72109</td>
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<tr>
<td>IDENTITY</td>
<td>Electronic serials</td>
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<tr>
<td>LIB. HAS</td>
<td>Issue 1302 (1999)-</td>
</tr>
</tbody>
</table>
WORKFLOW

• Collection Development
  – Select free & purchased titles
  – Type of access, number of users, URL, notes

• Acquisitions
  – Holdings data, notes

• Cataloging
  – Title, author, LCSH, DDC or LCC, language
  – Rapid creation: Expect (Unix TCL)
  – XML Page scrapers for holdings update

• Registry
  – Patron records
Registry - Build Patron Record

Systems Dept

Acq Dept - Order, Checkin & Bib

Cat Dept - Bib record

Coll. Dev. - License Info

Multi-purposing Of Data

HKALL (INN-Rreach)
OCLC

ILS (Innopac)

Systems Dept

ER (A~Z List)
Electronic Resources

Browse by Format:

- Almanac & factbooks (3)
- Article Databases (1,458)
- Atlas, maps & gazetteers (12)
- Bibliographies (103)
- Biographies (94)
- Book & media reviews (6)
- Catalogues (20)
- Census, statistics & surveys (153)
- Citation reports (10)
- Copyrights & patents (40)
- Dictionaries & encyclopedias (809)
- Directories (216)
- E-Book Collection (167)
- E-Books (977,653)
- E-News (2,370)
- E-News Collection (25)
- E-Theses Collection (15)
- E-journals (60,260)
- E-theses (168,805)
- Examination papers (1)
- Free web sites (1,801)
- Government reports (29)
- Handbooks, manuals (1,651)
- Law reports, digests, and cases (3,810)
- Legislation (2,734)
- Mobile access resources (36)
- Others (34,967)
- PDA E-books (2)
- Specifications & standards (2,158)
- Table of contents (63)
- Treaties (21)
Search within this subject:

[Search box]

**Architecture**: Core and Featured

**Jump to page**: 1

Total number of hits is 18, and record(s) 1 to 18 are:

1. AATA online: abstracts of international conservation literature [FREE]
2. Advanced building technologies & practices [FREE]
3. archINFORM: international architectural database [FREE]
4. Architecture.com: for the Royal Institute of British Architects [FREE]
5. Art full text [FREE]
6. Art index retrospective [FREE]
7. ARTbibliographies modern
8. Avery index to architectural periodicals
9. Centre for education in the built environment [FREE]
10. Construction & building abstracts
11. Cyburbia: the urban planning portal [FREE]

[List of formats in this subject]

- Article Databases (11)
- Bibliographies (1)
- Catalogues (1)
- Citation reports (1)
- Core and Featured (18)
- Dictionaries & encyclopedias (4)
- E-Books (2910)
- E-Journals (204)
- E-Theses (2540)
- Free web sites (29)
- Government reports (1)
- Handbooks, manuals (1)
- Others (168)
ISI web of knowledge

Click to start searching ISI web of knowledge

Click to access mobile version of the database

Mobile access information -- Click here

<table>
<thead>
<tr>
<th>Broad Subject</th>
<th>General - Science</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Multi-Discipline</td>
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<tr>
<td>Subject</td>
<td>Research - Databases</td>
</tr>
<tr>
<td>Summary</td>
<td>The ISI Web of Knowledge is a Web-based platform that integrates several databases with additional sources of influential content. This database extends and deepens the research coverage available through one resource by integrating journal, patent, proceedings, and life sciences literature with Web resources and other scholarly data.</td>
</tr>
<tr>
<td>Publisher</td>
<td>Institute for Scientific Information</td>
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<td>Language</td>
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Warning: Use of the files is restricted to purposes of research and education only. Other uses and excessive downloading are strictly prohibited. Violators will lose library privileges, face disciplinary actions and may be prosecuted.

Available at:

Click to start searching ISI web of knowledge

Authorized remote access from
Form | HKUVPN, EZproxy, HKU SPACE |
Location | Article Databases  |
Web Mounted |
New Uses

Multipurposing!
EZProxy

- Prefix added to URL
- 996|g controls access to various groups
  - Remote access? Alumni? Distance education?
- Auto updated with cron jobs
- Statistics
  - consistent
- Authenticates against ILS patron file
Electronic Resources
Alumni e-Library

Browse by Subject:

- Multi-Discipline
- Reference
- Architecture
- Arts and Humanities
- Engineering and Technology
- Law
- Medical Sciences/Nursing
- Science
- Social Sciences
- Area Studies

* NOT ALL electronic resources subscribed by HKUL are available for alumni's remote access. Licenses with some database vendors do not allow alumni access. Access to these resources may also be changed by HKUL without prior notice.
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<th>Resource</th>
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<tbody>
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<td>Order Record</td>
<td>[Click here for more details]</td>
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<tr>
<td>Requester</td>
<td>• Collection Development</td>
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<td>Vendor / publisher note</td>
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<tr>
<td>License</td>
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<td>Vendor data form</td>
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<td>Pricing</td>
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<tr>
<td>Backfiles available</td>
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</tr>
<tr>
<td>MARC / title / URL list</td>
<td>• List of all Titles</td>
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<tr>
<td>Perpetual access note</td>
<td>• Yes</td>
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<tr>
<td>Self-archive rights / Institutional repository / Open access</td>
<td>• No</td>
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<tr>
<td>Entitlements</td>
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<tr>
<td>ILL</td>
<td>• No</td>
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<tr>
<td>Course Pack</td>
<td>• Yes</td>
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<tr>
<td>e-Reserve</td>
<td>• Yes</td>
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<tr>
<td>Usage</td>
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<td>WebBridge</td>
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<tr>
<td>Branding</td>
<td>• Yes</td>
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<td>Updates</td>
<td></td>
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<tr>
<td>Proposals and evaluation</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Child</td>
<td></td>
</tr>
</tbody>
</table>
THE FUTURE?

• An iterative process
• More integration
• More standard based
  – COUNTER, SUSHI, etc

Next Generation ILS
  – Alpha, Ex Libris
  – Sierra, Innovative
  – Worldshare Management Services, OCLC
THANK YOU FOR YOUR ATTENTION!

Do you have any questions?
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