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Report of the ALCTS/LITA Electronic Resource Management Interest Group Meeting. American Library Association Midwinter Conference, San Antonio, January 2006.

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REPORT OF THE ALCTS/LITA ELECTRONIC RESOURCE MANAGEMENT INTEREST GROUP MEETING. AMERICAN LIBRARY ASSOCIATION MIDWINTER CONFERENCE, SAN ANTONIO, JANUARY 2005.

The ALCTS/LITA Electronic Resource Management Interest Group was formed in 2005 to enable the exchange of information among librarians, publishers, electronic resource management system vendors and related service organizations about issues related to the management of electronic resources. An outgrowth of informal meetings started by Tim Jewell of the University of Washington and Adam Chandler of Cornell University held at ALA Annual and Midwinter since 2001, the group aims to assist in developing appropriate, responsive systems and standards by fostering open collaborative discussions.

The interest group's first formal meeting, held Friday evening of the conference, provided an opportunity to share information about a few key initiatives that affect developments with Electronic Resource Management systems (ERMs). The attendance by 126 people was indicative of the need for this forum. Greg Raschke, the IG's chair, opened the meeting with a summary of the purpose and mission, outlined the agenda for the meeting, and then introduced the invited speakers.

Representatives from the Standardized Usage Statistics Harvesting Initiative (SUSHI) had been asked to present an overview. Tim Jewell (on behalf of Adam Chandler) and Oliver Pesch of EBSCO gave a summary of the presentation scheduled for the following day at the LITA Standards Interest Group meeting. Adam Chandler and Oliver Pesch are Co-Chairs for this working group that was formed as a result of the Digital Library Federation (DLF) Electronic Resource Management Initiative (ERMI). Identified next steps for DLF ERMI included standardized terms of license expression, revision of the data dictionary, and usage statistics. The SUSHI group is specifically working on harvesting and reporting usage statistics related to *COUNTER Code of Practice Journal Report 1*. Jewell pointed out that while Project COUNTER has provided useful guidelines for counting and reporting usage, the statistics are not yet available in tab delimited format comparable by data producers. Manually compiling the various available spreadsheets is very time consuming for libraries. Pesch informed the audience that the objective of the SUSHI project is to use web services to pull usage statistics directly into an ERMs. Jewel indicated a prototype has been tested; the group is seeking participation by a variety of data providers for the open pilot phase. NISO standards will be drafted so that this can become a COUNTER requirement. A workshop is planned for April or May to give stakeholders a more thorough briefing. For more information, see the project website at <http://www.library.cornell.edu/cts/elicensestudy/ermi2/sushi/>.

Two vendors had been invited to address next directions for ERMs. Ted Fons of Innovative Interfaces reviewed the development of ERMs from home-grown systems to more sophisticated second/third generation vendor products with better integration of usage statistics a logical subsequent enhancement. He projected the possibility of ERM systems having a greater collection development role similar to that of the Integrated Library System (ILS) for print materials, such as for examining cost per use or coverage overlap. Fons also foresaw an expanded role for the ERMs as a mechanism for communicating licensing information between

libraries and providers, keeping in mind “the big picture of information exchange.” He stated that ERMs need to meet the goal of less staff work for more benefit. Ted Koppel of Ex Libris spoke about the need to build on avenues suggested by the DLF ERMI, particularly for workflow and task management. He mentioned adding functions for more cut-and-paste capabilities between management attributes, cross-installation searching to manage consortia by group, enhanced interfacing with other applications (including those with a public face), and searches in non-Roman alphabets. He stated that the work of the NISO License Expression work group would be of particular interest to ERMs vendors.

This led into an update from Nathan Robertson of Johns Hopkins on the NISO/EDItEUR ONIX For Licensing Terms Working Group. Robertson stated that the goal of this group is to create a standard XML expression for license information exchange, saving time for both library personnel and publishers. Currently ERMs users have to manually interpret license clauses and figure out where to put the information. Encoding the data would automate some of the process, allowing systems to talk to each other – a useful tool between the library and rights holder during license negotiations and within the library system environment for component interaction (e.g., letting a link resolver know the allowable access permission). While this group came out of DLF ERMI efforts, the use of the ONIX standard framework allows for additional library-needed non-ERMI elements to be included with more granularity. Robertson’s Co-Chair for this group is Alicia Wise of the Publishers Licensing Society (UK). Starting from previous EDItEUR Onix notes, the group hopes to have a pilot test within the year. Tim Jewell interjected a reminder about the Publisher Vendor Library Relations Interest Group Open Forum the following Monday on “Standardized License Expression.” More ONIX for Licensing Terms information can be found at <http://www.editeur.org>.

Greg Raschke expressed an interest in seeing future ERMs developments include evaluating the electronic journal as a serial work versus just focusing on at e-journal usage statistics. Vendors need to continue exploring how to leverage ERMs capabilities.

Raschke than opened the meeting to general comments. Several attendees spontaneously requested signing a petition to show support for the SUSHI project, so paper was sent around to collect signatures and contact information. Several related sessions of interest were mentioned that were taking place at this conference as well as at the NASIG conference in May, including a presentation at NASIG by Tim Jewell and Ted Fons on “Envisioning the Future of ERM Systems” (see <http://www.nasig.org>).

A request was made for an update on ONIX Serials Online Holdings (SOH), a subgroup of the NISO/EDItEUR Joint Working Party for the Exchange of Serials Subscription Information. Ted Fons gave an update as a member of that group. The group is developing a format for the exchange of holdings data from providers to subscribing libraries, relying on XML-formatted data containers. Related ONIX Serials subgroups are Serials Products and Subscriptions (SPS), who are focused on communicating what publishers/providers have to offer to those who are considering a purchase (i.e., product catalog information), and Serials Release Notification (SRN) who are working on issue-level description so providers can transmit information about what is currently available (either issues or, potentially, specific articles). Robertson added that

the latter would allow publishers to notify subscribers when the most current issue is published such as they do for print.

Various ERM vendors spoke briefly about upcoming features of their products. Ed Riding of Sirsi-Dynix spoke about new capabilities related to special libraries and subscription renewal/termination workflow. Sean Thomas of VTLS mentioned a current prototype in beta testing for consortia and large academic libraries that includes task management and information exchanges based on user, class, and role. Kathryn Harnish of Endeavor talked about the next Meridian release that extends and automates more processes, as well as adding analysis capability. Mike Showalter of Serials Solutions mentioned an upcoming technology showcase at the conference.

For the 2006 Annual Conference in New Orleans, Raschke will investigate options for a possible alternative IG meeting time. He and Vice Chair Kitti Canepi will also explore possible co-sponsorship of related programs at the upcoming ALA Annual in New Orleans.

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