

Sharing an ERMS for an efficient management of electronic resources metadata

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A project from Couperin consortium

- A project enabling members to:
 - **manage** e-resources life-cycle and **metadata**
 - **analyze** overlapping collections
 - **gather** e-resources usage statistics
- A project to deal with the needs of Couperin for:
 - **managing** its negotiations
 - **storing** and **sharing** e-resources and negotiations **metadata** with its members
 - better **identifying** its members' collections

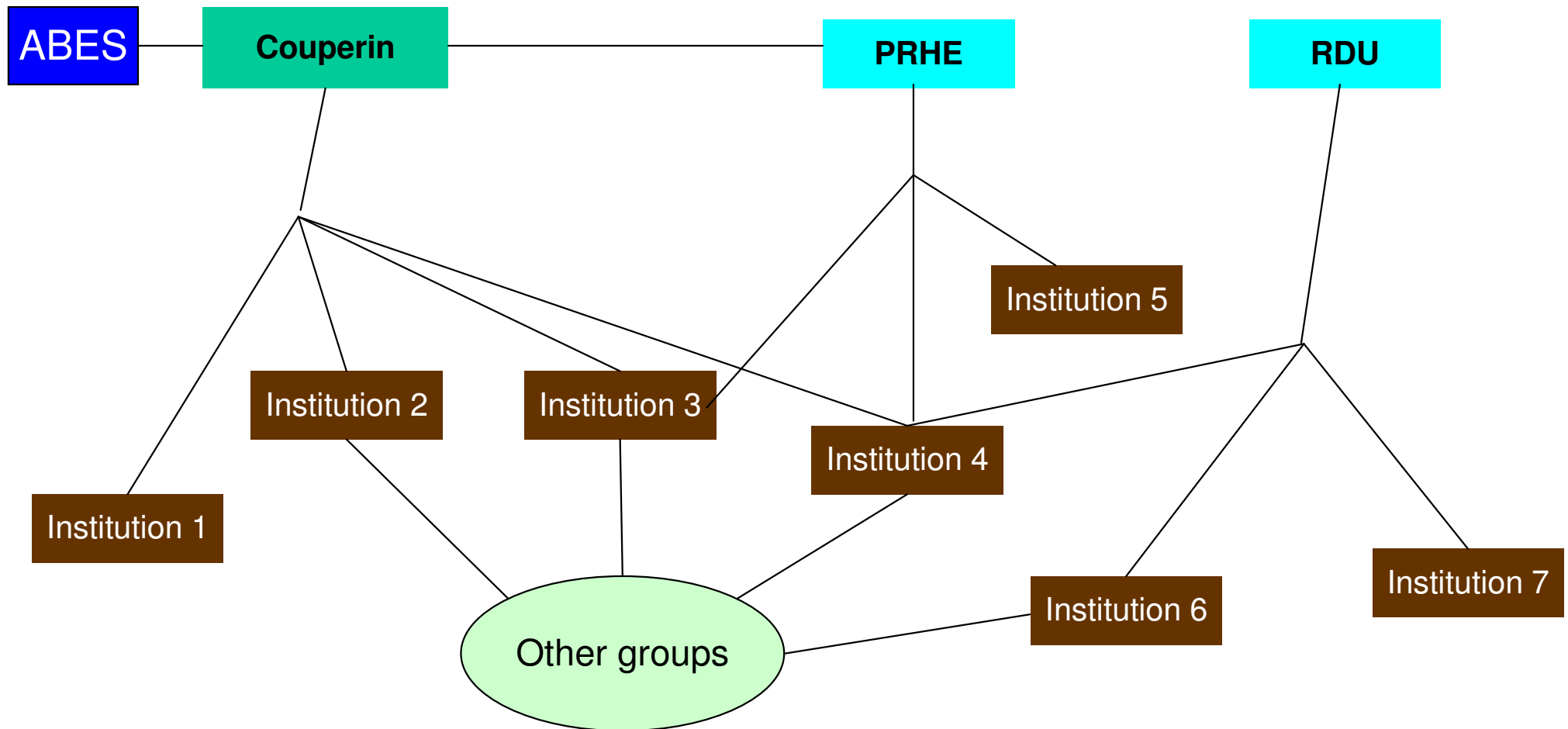


The French negotiation and acquisition environment

- Electronic resources from French academic libraries
 - Small or **medium-sized** collections
 - Couperin (206 members) an academic consortium for e-resources, **mostly national**
- Regional or local groups performing **within or outside** Couperin



The French e-resources acquisition environment based on an opt-in model



E-resources management tools used in France

- Only 3 libraries equipped with ERMS because of
 - The **limited size** of collections or **lack of staff** resources and funding
 - The **immaturity** of ERMS
- The current use of widespread tools
 - Spreadsheet files and/or paper files and/or office database



The working group GTERMS

- An **open working group** created in 2007
- Its main goals are :
 - To **define** metadata and functional needs
 - To **evaluate** existing ERMS
 - To define a **scenario** meeting those needs



Our « great expectations »

- **What does Couperin expect from an ERMS?**
 - An **easier management** of negotiations and purchasing workflows
 - An easier management of
 - **Commercial e-resources** metadata
 - **Open access e-resources** metadata
 - A **central knowledge base** providing information on e-resources and where they can be accessed
 - A support in **providing indicators** for the consortium scorecard
- **The ideal ERMS for Couperin members**
 - Is based on a knowledge base including **French-speaking publishers**
 - Is **cost-effective**
 - Is supporting yearly **provision of data**, required by libraries' different supervisory authorities
 - Should also be used by end users as an electronic resources **discovery tool**



Why considering a shared ERMS solution?

Sharing an ERMS solution is the best solution:

- to **address the needs** of libraries having **small collections** and **lack of staff**
- **70% to 80%** of descriptive and administrative **metadata** values are the **same** for all members due to “**Big deals**”
- to **improve** the **quality** of negotiation and acquisition activities of Couperin
- to define a source of **enhanced information** on electronic resources, covering French-speaking publishers and **French** products



What does « shared » mean?

- **Collaborative**
 - Many partners own different information
 - Many partners act at various occasions

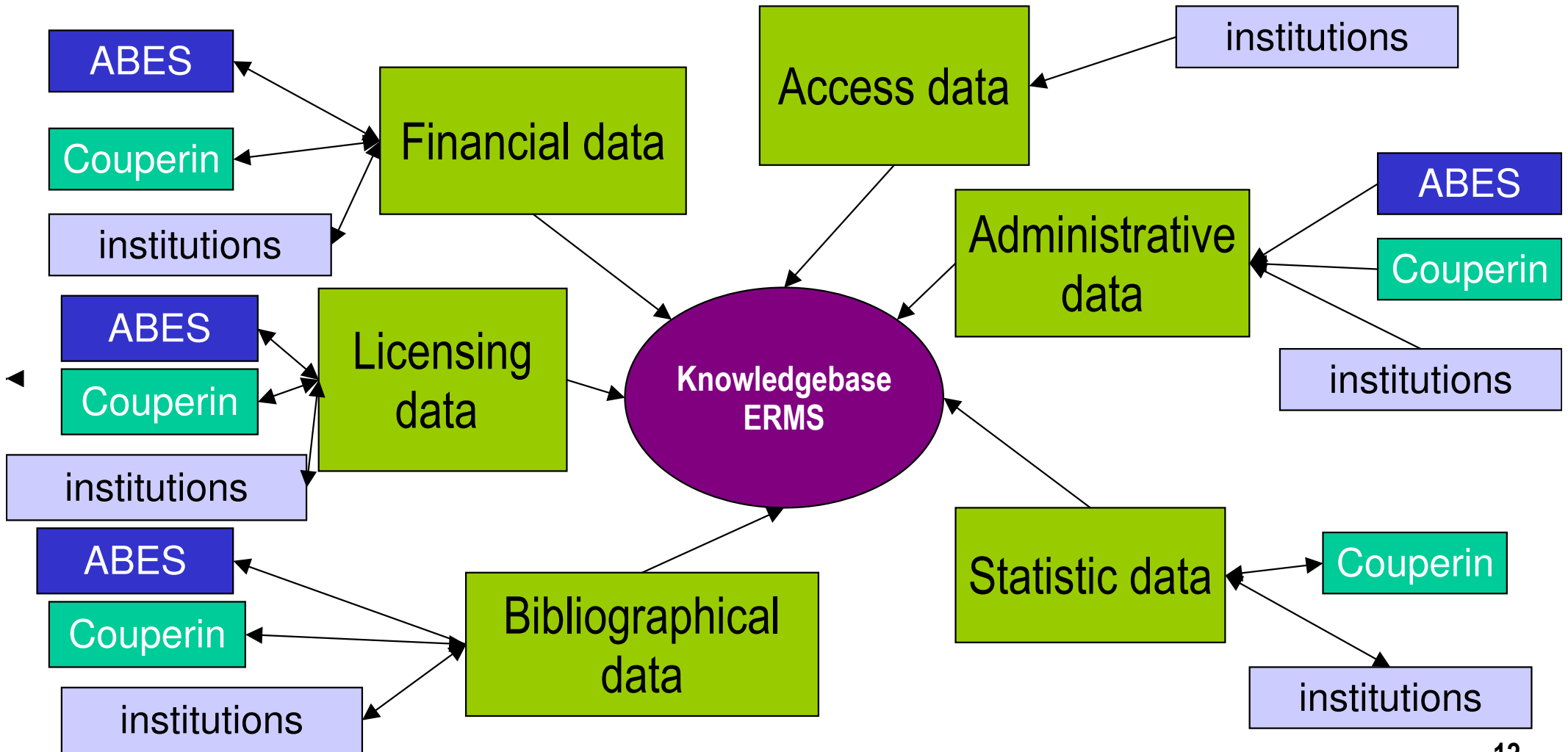


What does « shared » mean?

- **Common**
 - Various data populate a unique knowledgebase
 - The same knowledgebase populate local systems



A common knowledgebase

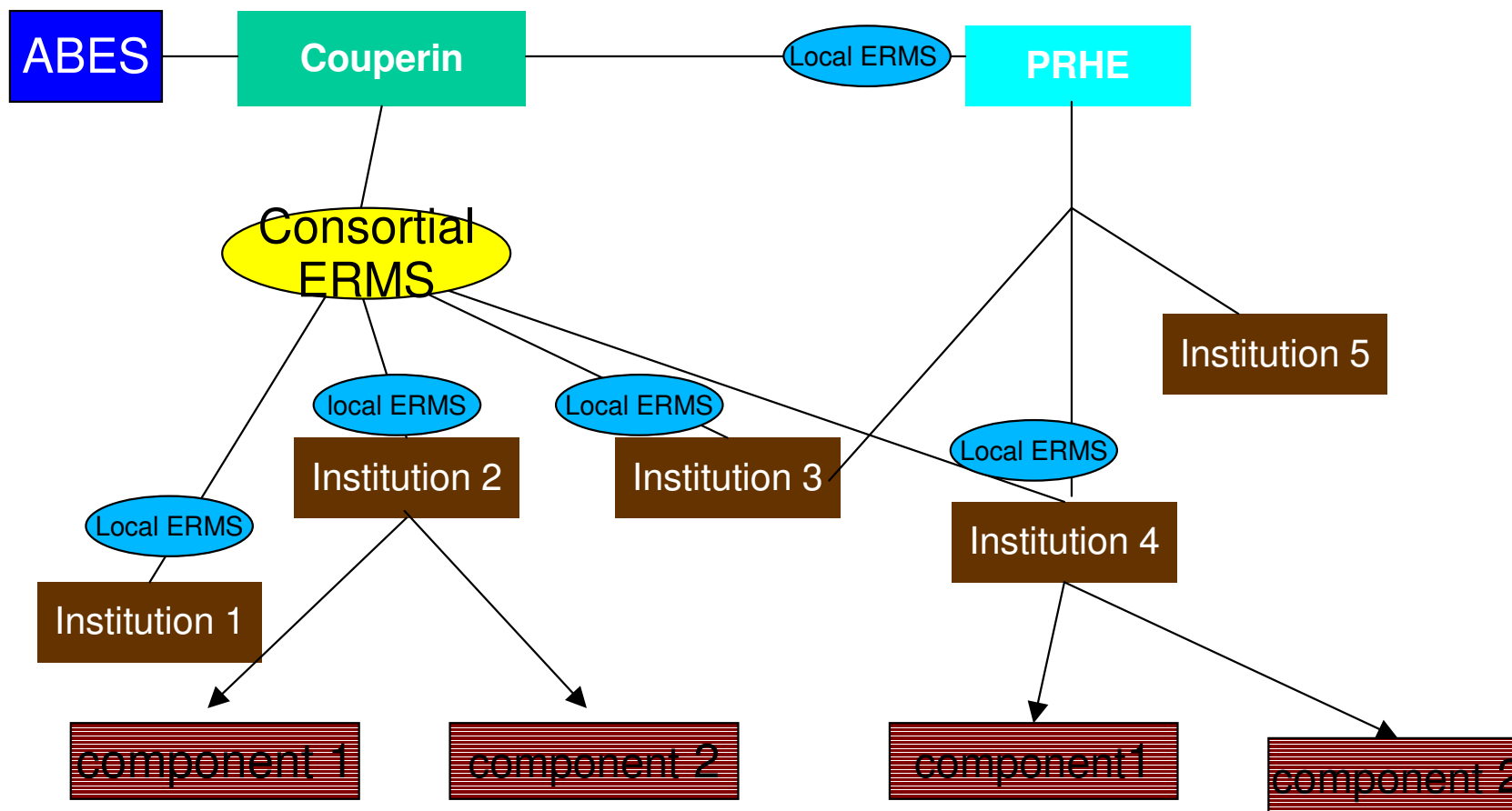


Data inheritance

Data type	Consortial ERMS	Local ERMS
Bibliographical data	yes	yes
Administrative data	yes	yes
Licensing and financial data	yes	yes



Data inheritance in a shared ERMS



What have we done?

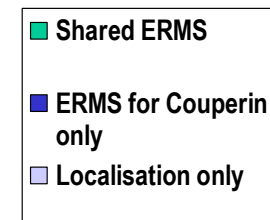
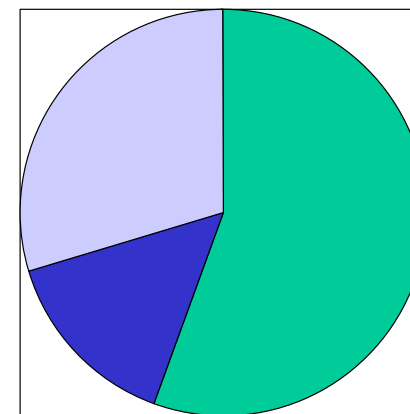
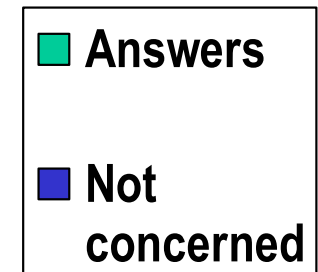
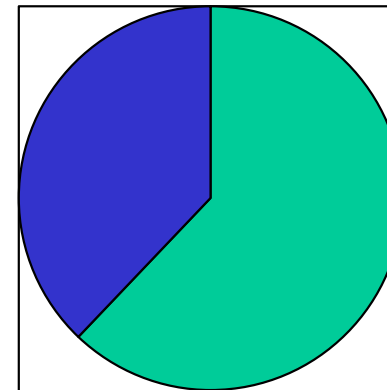
- Coordinating a working group of **40 librarians** for **20 months**:
 - Defining a **set of useful metadata and functionalities**
 - Writing one **demonstration guide**
 - Attending 3 **public demonstrations**: Verde (ExLibris), V-sources (Infor Library), ERM (Innovative Interfaces) and 2 **presentations** : SwetsWise (Swets), ERM Essentials (Ebsco)
 - Administrating **two tests**: 360 Manager (Serials Solutions) and Gold Rush (Colorado Alliance)
 - Conducting a **large survey** among our members
 - Writing a **book of specifications**

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What have we done?

- Conducted a large **survey** among all Couperin members
- Outcomes:
 - **Needs expressed** by the working group were **validated** by 128 members
 - **70 members** libraries will **take part** in the project



Key issues

- 1) **Commercial** ERMS solutions for consortia are at an early stage of development
- 2) Chose an **economic** model
- 3) Deal with **legal** issues
- 4) Address last **technical** issues
- 5) **Organizing** the workflows among 70 members is a challenge



Commercial issues

- **Commercial ERMS solutions for consortia are at an early stage of development**
 - Some products are on the right way to meet the needs of consortia
 - Question of access, definition of roles is a major issue in consortium management



Economic issues

- **3 economic models** have been considered:
 - Acquisition and local installation of a commercial ERMS
 - Financing the development of an open-source ERM
 - Subscription to a hosted service
- The choice of a hosted service is based on:
 - The changing number of interested members
 - The progressive nature of ERMS for consortia
 - The cost effectiveness of subscription



Legal issues

- **Legal issues**
 - Classical tender
 - Competing procedures
 - Public/Private partnership
- The choice of the legal procedure will rely on:
 - Legal analysis of our situation
 - Expertise from a consultant
 - Involvement of the ABES



Technical issues

- **Technical issues: what about interoperability?**
 - With ILS
 - With Link resolvers
 - With AtoZ type list
- What about emerging products such as ERAMS, UMS?



Organizational issues

- **Organizing** the workflows with 70 members is a challenge for Couperin
 - Our **strength**: a traditional national network
 - Our **weakness**: a variety of e-resources management organization among our members
 - Our **opportunities**: to be at the beginning of a new era of ERMS for consortia and have a great scope for negotiating
 - Our **threat (ie risk)**: to assume the responsibility of being one of the largest library consortia in Europe to use an ERMS for managing e-resources



Next steps

- Submit our requirements and specifications book to a **consultant**
- Launch the **call for tender** or other legal procedure
- Set up the **pilot libraries**



Thank you!

- To learn more:
 - Our wiki (in French): <http://gterms.wikidot.com/>
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