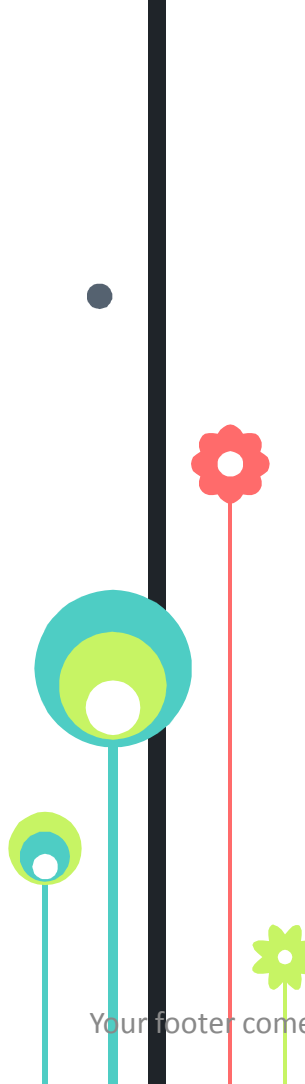
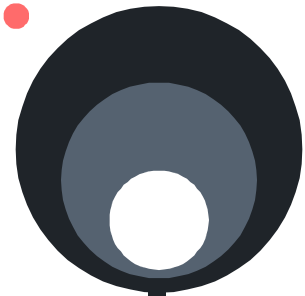




**DIY E-RESOURCE MANAGEMENT**

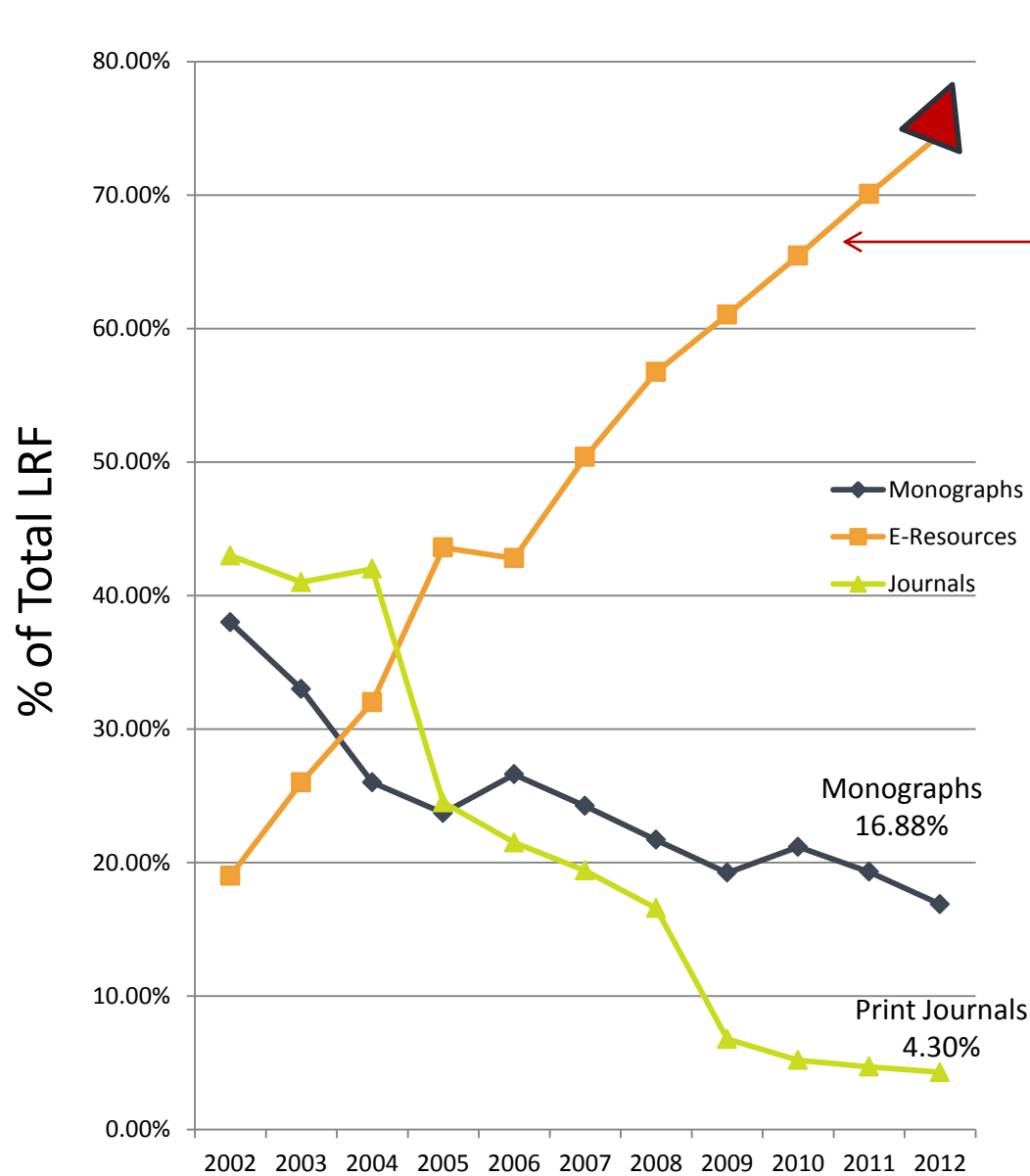


# ELECTRONIC RESOURCE MANAGEMENT (ERM)

## WHY?

Your footer comes here

# HKU, Library Resource Fund %, 2002 - 2012

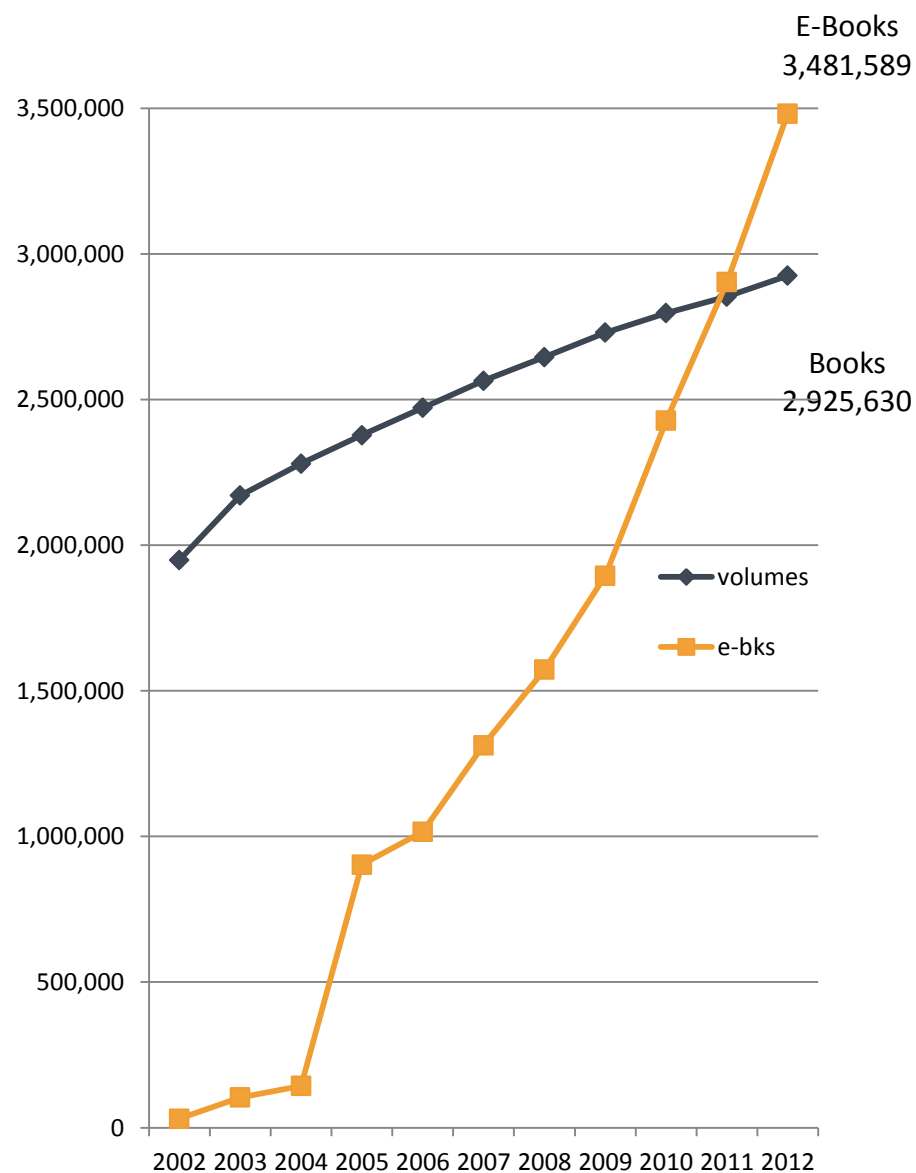
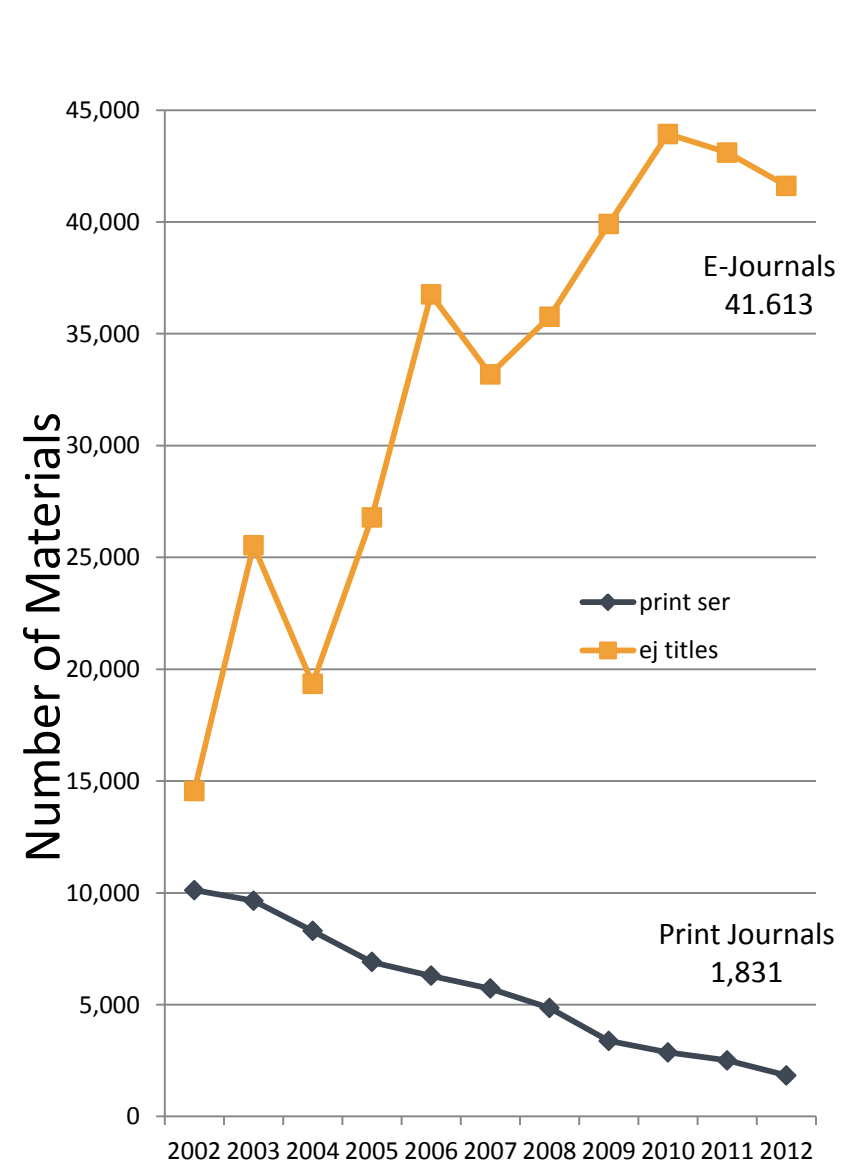


E-Resources  
74.54%

Tail of the  
Dragon



# HKU, Number of Materials. 2002-2012.






# 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.

“Building a Better ERMS,” *Library Journal*  
(March 2011): Maria Collins & Jill Grogg





# 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

Product	Vendor
Verde	Ex Libris
Millennium ERM	Innovative Interfaces
Web-scale Management Services	OCLC
EBSCONET ERM Essentials	Ebsco
ERM as a Service	Swets
E-Resources Services	Harrassowitz
Journal Finder	WT Cox
360 Resource Manager	Serials Solutions
TERMS Core ERMS	TDNet
Gold Rush	Colorado Alliance



# SOLUTIONS: OPEN SOURCE

Product	Source
E-Matrix	North Carolina State University
CUFTS	Simon Fraser University
CORAL	University of Notre Dame
ERMes	University of Wisconsin-La Cross



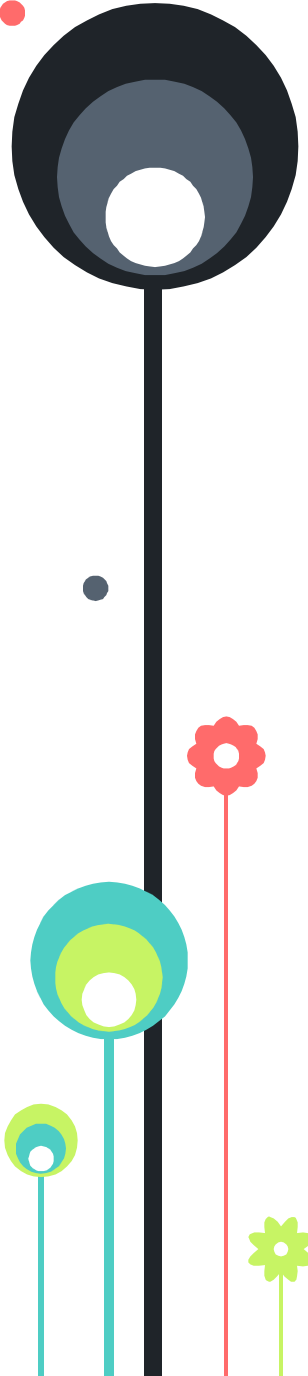


## THE GOOD, THE BAD, & THE UGLY

“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

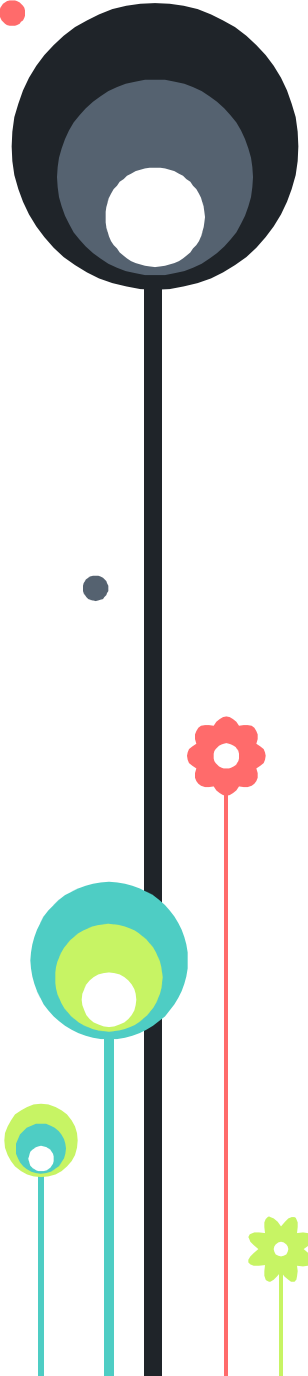




“Several librarians described the data within their ERM systems as static and only as good as their ability to maintain it. The increase in workload has resulted in increased staffing needs for many libraries.”

-- 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!

## HKU Libraries Information Services

### 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

(c) Copyright 1989-95 McAfee, Inc.











F1=Help F2=Network Printing F3=Scan Virus



## Main Menu

- **Communications**
- Meridian CD Net
- Eten Chinese System 3.5
- Kuo-Chiau Chinese System
- WordPerfect
- Scan Viruses
- DBase IV
- Lotus Software
- WINDOWS 3.1
- Harvard Graphics 3.0
- Campus Wide Information Service
- Hytelnet 6.5
- PC-SIG Library
- Select Network Printers
- DOS, Netware & Printer Commands
- MIS (For Administrators Only)
- Dialog Access

# 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](#)

### Arts

- ▶ [Chinese](#)
- ▶ [Comparative Literature](#)
- ▶ [English Literature](#)
- ▶ [Linguistics](#)
- ▶ [Fine Arts](#)
- ▶ [Geography & Geology](#)
- ▶ [History](#)
- ▶ [Japanese Studies](#)
- ▶ [Music](#)
- ▶ [Philosophy](#)
- ▶ [American Studies](#)
- ▶ [European Studies](#)

### Engineering

- ▶ [Engineering in General](#)
- ▶ [Civil Engineering](#)
- ▶ [Computer Science and Information Systems](#)
- ▶ [Electrical & Electronic Engineering](#)
- ▶ [Industrial & Manufacturing Systems Engineering](#)
- ▶ [Mechanical Engineering](#)

### 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”

856 40 |uhttp://eproxy.lib.hku.hk/login?url=http://  
firstsearch.oclc.org/autho=100214401;journal=0309-  
1902;screen=available;done=referer;FSIP|x12|zClick to  
start searching via FirstSearch

856 40 |uhttp://eproxy.lib.hku.hk/login?url=http://  
search.epnet.com/direct.asp?db=aph&jn=%22B9Q%22&scope  
=site |x13|zClick to start searching via Academic  
Search Premier

996 y|cip|l12|dFirstSearch|eej|f15|gpok|gp|hn

996 y|cip|l13|dAcademic Search Premier|eej|gsp|gpok|ga|gp|hy

# PASSWORD CONTROL


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

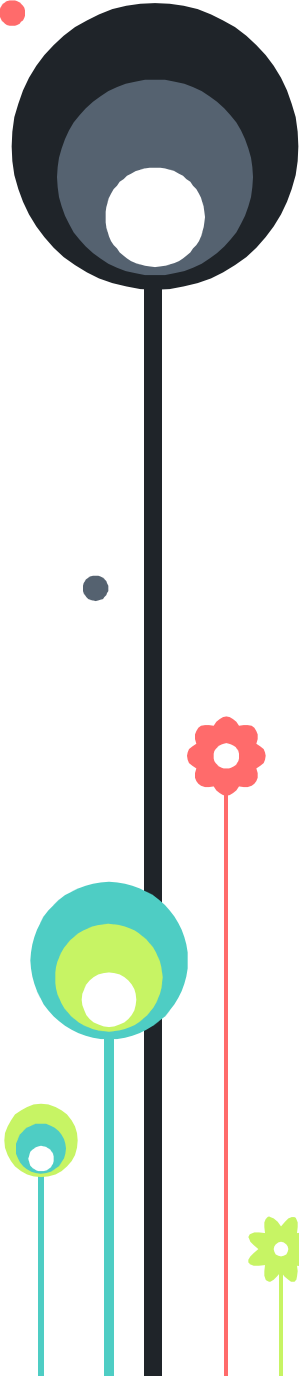
```
C4732406                                CHECKIN Information
LABEL TYPE: n                            COPIES: 1                            RLOC: s                            SCORE4: -
SCORE1: s                                CLAIMON: - -                            VENDOR: halp.                        UPDCNT: c
SCORE2: -                                LOCATION: int                            SCORE3: -                            PCOUNT: 0
XFIELD      Web Resources
CALL #      K1 C53 L41 A5
PFIELD      $$ahkulawlib//uni72109
IDENTITY    Electronic serials
LIB. HAS    Issue 1302 (1999) -
```





# 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
- 



Coll. Dev.  
- License Info



Acq Dept  
- Order, Checkin  
& Bib

Cat Dept  
- Bib record

Multi-  
purposing  
Of Data

Registry  
- Build Patron Record

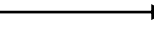
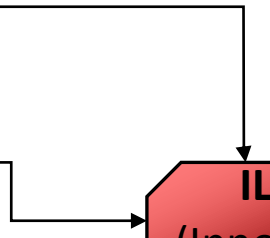
ILS  
(Innopac)

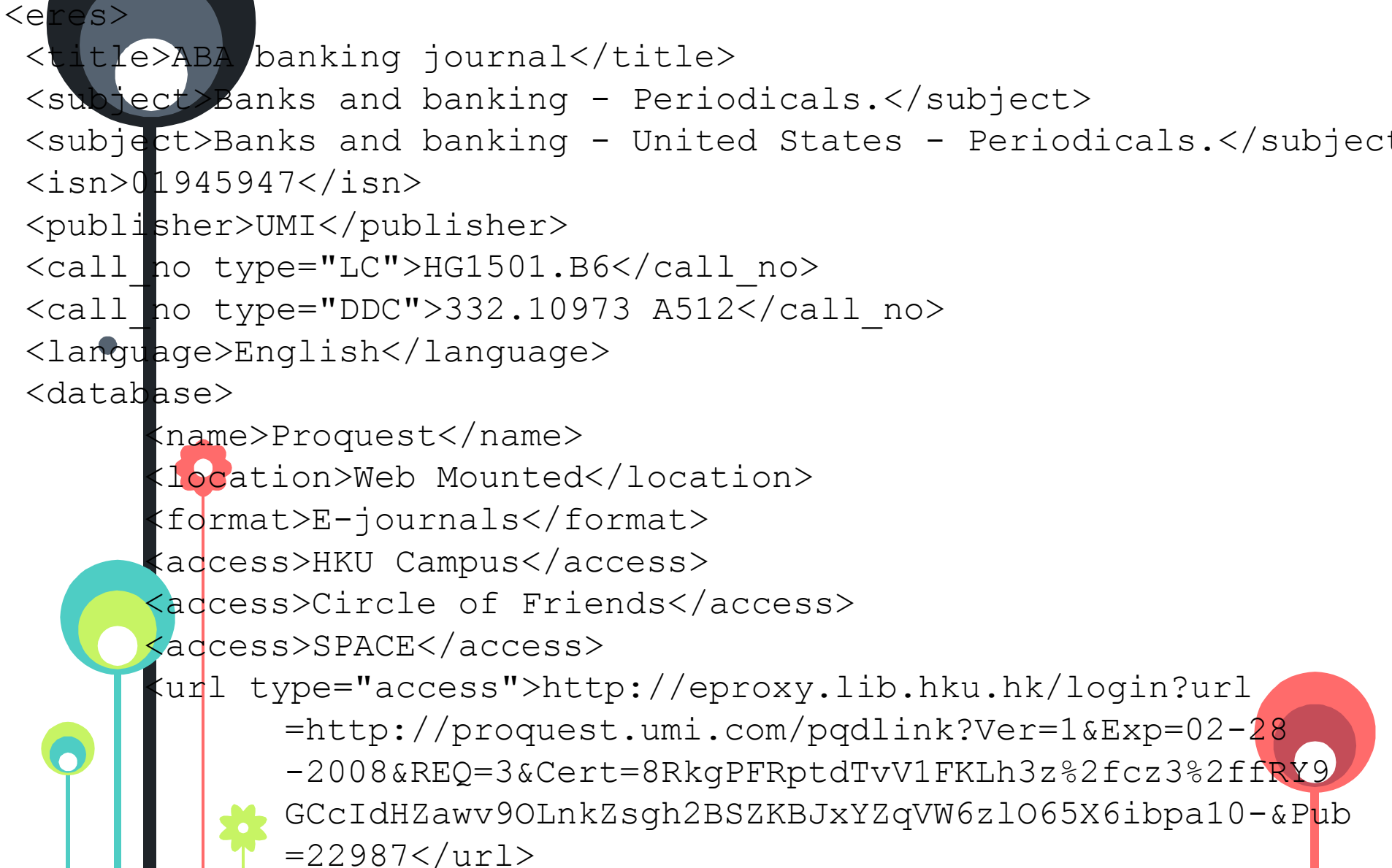
HKALL  
(INN-Rreach)  
OCLC

Systems  
Dept

ER  
(A~Z List)

<extract>





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<subject>Banks and banking - United States - Periodicals.</subject>
<isbn>01945947</isbn>
<publisher>UMI</publisher>
<call_no type="LC">HG1501.B6</call_no>
<call_no type="DDC">332.10973 A512</call_no>
<language>English</language>
<database>
<name>Proquest</name>
<location>Web Mounted</location>
<format>E-journals</format>
<access>HKU Campus</access>
<access>Circle of Friends</access>
<access>SPACE</access>
<url type="access">http://eproxy.lib.hku.hk/login?url
    =http://proquest.umi.com/pqdlink?Ver=1&Exp=02-28
    -2008&REQ=3&Cert=8RkgPFRptdTvV1FKLh3z%2fcz3%2ffRY9
    GCcIdHZawv90LnkZsgh2BSZKBJxYZqVW6z1065X6ibpa10-&Pub
    =22987</url>
```

## Electronic Resources



Browse by Subject ▶

Browse by Format ▶

Locate an E-resource ▶

Key English E-resources ▶

Key Chinese E-resources ▶

New E-resources ▶

E-resources on trial ▶

Ask a Librarian ▶

### Browse by Subject:

Multi-Discipline ▼

Reference ▼

Architecture ▼

Arts and Humanities ▼

Engineering and Technology ▼

Law ▼

Medical Sciences/Nursing ▼

Science ▼

Social Sciences ▼

Area Studies ▼

## Electronic Resources



Browse by Subject ▶

**Browse by Format** ▶

Locate an E-resource ▶

Key English E-resources ▶

Key Chinese E-resources ▶

New E-resources ▶

E-resources on trial ▶

Ask a Librarian ▶

### Browse by Format:

- Almanac & factbooks (3)
- Article Databases (1,458)
- Atlas, maps & gazatteers (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)

## Electronic Resources



Browse by Subject ▶

Browse by Format ▶

Locate an E-resource ▶

Key English E-resources ▶

Key Chinese E-resources ▶

New E-resources ▶

E-resources on trial ▶

Ask a Librarian ▶

Search within this subject:


Submit

### Architecture : Core and Featured

Jump to page : 1

Found 13 formats  
in this subject

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  
- 6 Art index retrospective  
- 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**

- 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)



Browse by Subject

Browse by Format

Locate an E-resource

Key English E-resources

Key Chinese E-resources

New E-resources

E-resources on trial

Ask a Librarian

## 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](#)**

### Broad Subject

General - Science  
Multi-Discipline

### Subject

Research - Databases

### Summary

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.

### Publisher

Institute for Scientific Information

### Language

English

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

HKUVPN, EZproxy, HKU SPACE

### Format

Article Databases

### Location

Web Mounted

New Uses

Multipurposing !



Coll. Dev.  
- License Info

Acq Dept  
- Order, Checkin  
& Bib

Cat Dept  
- Bib record

Multi-  
purposing  
Of Data

Registry  
- Build Patron Record

ILS  
(Innopac)

HKALL  
(INN-Rreach)  
OCLC

Systems  
Dept

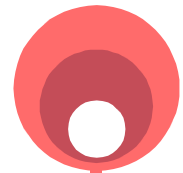
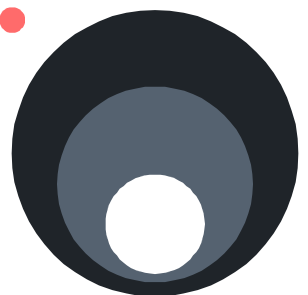
EZProxy  
- Config  
- Stats

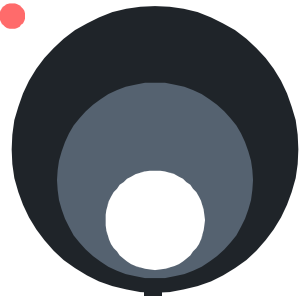
Portals  
- Alumni  
- Distance Edu

Knowledge Base  
- Link resolver

ER  
(A~Z List)

Other databases  
-Theses, etc.





# EZPROXY

- Prefix added to URL
  - [http://eproxy.lib.hku.hk/login?url=http://wilsonweb2.hwwilson.com/|](http://eproxy.lib.hku.hk/login?url=http://wilsonweb2.hwwilson.com/)
- 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:

Browse by Subject ▶

Multi-Discipline ▼

Browse by Format ▶

Reference ▼

Locate an E-resource ▶

Architecture ▼

Key English E-resources ▶

Arts and Humanities ▼

Key Chinese E-resources ▶

Engineering and Technology ▼

New E-resources ▶

Law ▼

Ask a Librarian ▶

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.

View Paste Filter Sort & Filter Records Find Window

Ascending Descending Remove Sort  
 Selection Advanced Toggle Filter  
 New Save Delete  
 Totals Spelling More  
 Replace Go To Select  
 Size to Fit Form Switch Windows

All Access Objects

- Tables
  - BackfilesAvailable
  - BibRecord
  - Child
  - Entitlements
  - License
  - main
  - MarcTitleUrlList
  - OrderRecord
  - PerpetualAccessNote
  - Pricing
  - ProposalsAndEvaluation
  - Requester
  - SAR\_IR\_OA
  - Usage
  - VendorDataForm
  - VendorPublisherNote
- Queries
  - QueryExpiredWithin30Day
  - QueryExpiredWithinThree...
  - QueryLicenseName
- Forms
  - BackfilesAvailable Subform
  - BibRecord Subform

main

RID:

LicenseName: American Association for Cancer Research (AACR) Journals

WebBridge:

Branding: Yes

Updates: Yes, within each titles

eReserve: No

Status:

ILL: Yes, in compliance with Section 108 of the U.S. Copyright Law.

CoursePack: No

ExpiredDate: 12/31/9999

BackfilesAvailable Subform

name	link
Cancer Research (Jun 1963 - pres	<a href="http://library.hku.hk/record=b2231">http://library.hku.hk/record=b2231</a>
Clinical Cancer Research (Jan 199	<a href="http://library.hku.hk/record=b2231">http://library.hku.hk/record=b2231</a>
Molecular Cancer Therapeutics (N	<a href="http://library.hku.hk/record=b2506">http://library.hku.hk/record=b2506</a>
Molecular Cancer Research (Nov 2	<a href="http://library.hku.hk/record=b2926">http://library.hku.hk/record=b2926</a>

Record: 1 of 6

BibRecord Subform

name	link
B22310897	<a href="http://library.hku.hk/record=b22310897">http://library.hku.hk/record=b22310897</a>

Record: 1 of 1

Entitlements Subform

name	
Please see license agreement	AACR_2004 License

Record: 1 of 2

License Subform

<b>Resource</b>	Safari Tech Books Online
<b>Bib record #</b>	<ul style="list-style-type: none"> <li><a href="#">B25548153</a></li> </ul>
<b>Order Record</b>	<a href="#">Click here for more details</a>
<b>Requester</b>	<ul style="list-style-type: none"> <li>Collection Development</li> </ul>
<b>Vendor / publisher note</b>	
<b>License</b>	<ul style="list-style-type: none"> <li>nil</li> </ul>
<b>Vendor data form</b>	
<b>Pricing</b>	
<b>Backfiles available</b>	
<b>MARC / title / URL list</b>	<ul style="list-style-type: none"> <li><a href="#">List of all Titles</a></li> </ul>
<b>Perpetual access note</b>	<ul style="list-style-type: none"> <li>Yes</li> </ul>
<b>Self-archive rights / Institutional respository / Open access</b>	<ul style="list-style-type: none"> <li>No</li> </ul>
<b>Entitlements</b>	
<b>ILL</b>	No
<b>Course Pack</b>	Yes
<b>e-Reserve</b>	Yes
<b>Usage</b>	<ul style="list-style-type: none"> <li><a href="#">Usage Report &amp; Statistics</a></li> </ul>
<b>WebBridge</b>	
<b>Branding</b>	Yes
<b>Updates</b>	
<b>Proposals and evaluation</b>	
<b>Status</b>	
<b>Child</b>	

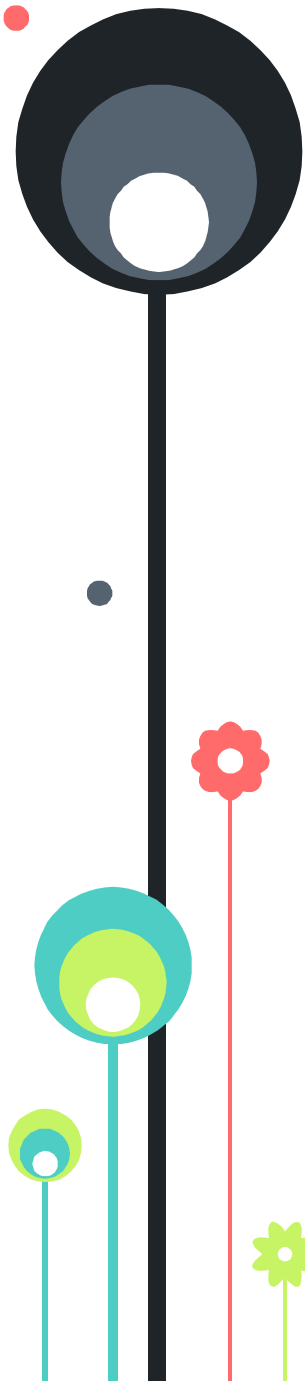


# THE FUTURE ?

- An iterative process
- More integration
- More standard based
  - → COUNTER, SUSHI, etc

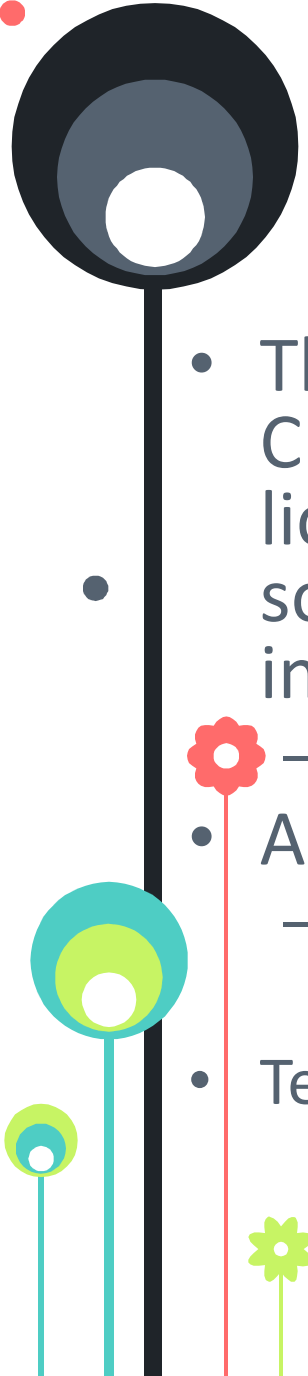
## Next Generation ILS

- Alpha, Ex Libris
- Sierra, Innovative
- Worldshare Management Services, OCLC



Do you have any questions?

**THANK YOU FOR YOUR  
ATTENTION !**

- 
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  - Archived at,
    - <http://hdl.handle.net/10722/176510>
  - Template & design by [www.showeet.com](http://www.showeet.com)