

## Chapter XVII

# Challenges and Potentials of Electronic Resource Management

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### **ABSTRACT**

*This chapter will focus on two ERM services, ExLibris' SFX and III's ERM. ExLibris' SFX is an example of a link resolver, whereas III ERM is an example of an ERM system. The discussion of these ERM services will focus on key issues encountered during ERM implementation at Cal Poly Pomona. The main objective of this chapter is to make the readers aware of the challenges and potentials ERM services offer, distilled from the experiences gained at Cal Poly Pomona.*

### **INTRODUCTION**

During the past decade, there has been phenomenal growth in the number of electronic resources including electronic journal packages and full text aggregations acquired by libraries. Cornell University Libraries projected that by 2005 their holdings will become mostly digital (Cornell Libraries, 2000). Though this prediction has yet to come to pass, the Association of Research Libraries (ARL) expenditure trend data (Association of Research Libraries, 2002) showed that academic libraries are “in the midst of a profound shift toward reliance on electronic resources, and this reliance seems to have deepened just within the last year or two as libraries have shed

paper journal subscriptions to help pay for online access.” Since providing access to electronic resources have become such a major part of the library services, it was crucial for libraries to tackle these new challenges head on.

As early as 2000, librarians began to search for a working tool to help manage electronic resources. Some of the in-house solutions included home grown A-Z list, paper files, spreadsheets, and stand-alone databases (i.e., using Microsoft Access). Virtual Electronic Access (VERA) developed at MIT and Digital Acquisitions Database developed at UCLA were two of the most well-known in-house examples. In July 2000, Digital Library Federation (DLF) Electronic Resource Management Initiative (ERMI) was formed

to create standards such as functional requirements, workflow diagrams, and data dictionary (Digital Library Federation, 2004). Based upon these standards, commercial electronic resource management (ERM) services began to appear in two major categories: Link resolver and ERM systems. Link resolver is a linking function based upon openURL that works with a majority of the electronic resources and ties together information about the cited resource, the user, and the library's online subscriptions. An ERM system can either be stand-alone software or a module within the integrated library system (ILS).

This chapter will focus on two ERM services, ExLibris' SFX and III's (i.e., Innovative Interfaces Inc.) ERM. ExLibris' SFX is an example of a link resolver, whereas III ERM is an example of an ERM system. The discussion of these ERM services will focus on key issues encountered during ERM implementation at Cal Poly Pomona. The main objective of this chapter is to make the readers aware of the challenges and potentials ERM services present, distilled from the experiences gained at Cal Poly Pomona.

### **BACKGROUND**

California State University (CSU) purchased ExLibris' SFX in the summer of 2002. SFX implementation among all 23 CSU campuses was subsequently carried out in phases during a span of four years. The CSU's main SFX server resides at the chancellor's office, managed by the system SFX coordinator. Each library of the 23 CSU campuses is an instance managed by the individual library's SFX Team. Cal Poly Pomona, an instance of CSU/SFX main server, was one of the first CSU campuses to roll out SFX to the public in Sept. 2002. From that experience, knowledge was gained in areas such as consortia specific tasks, workload and staff support, and implementation strategies.

In addition, Cal Poly Pomona purchased III ERM as a "natural" extension of the library's

ILS system right after the product was publicly released in Oct. 2004. As the implementation of III ERM occurred at a time when there was limited guidance and proven "best practices" available, the lessons learned revolved around defining code, record creation, batch load troubleshooting, and constantly improving the current practices for better ERM utilization in the future.

### **SFX CHALLENGES AND POTENTIALS**

ExLibris' SFX is a context-sensitive linking service commercially available since 2001. Based upon the openURL standard approved by the National Information Standards Organization (NISO), SFX provides links from one information resource to another, such as e-journal databases and full text aggregations, in a transparent manner to the public (Lagace, 2003). Using SFX allows the library to offer a consistent menu/user interface which promises direct links not only to the full text, if it is available, but also to alternative resources, customized at the library's discretion. In addition, SFX not only generates a customizable and updatable journal title list for the library's Web site but also provides on the same list pertinent coverage data as well as print holdings. Although the success and the usefulness of SFX depend upon many factors such as the source database metadata, the construction of the openURL string, the resulting target database structure, and the local libraries' collection development (Wakimoto, 2006), a link resolver such as SFX is considered by both the library users and the librarians as a significant step forward for full text search and delivery across multiple databases.

The key issues encountered during SFX implementation at Cal Poly Pomona included staff qualifications and support, SFX menu set up, target activation and update, and teamwork in a consortium environment.

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