

# (Why Aren't We) Solving Common Library Problems with Common Systems?

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# ERM = Problem Solving

- Book is listed in our catalogue but we've **lost access** on book platform
- Journal **thresholds** are differently listed between our catalogue, the link resolver, and the publisher platform - which is correct?
- When did we **cancel** Teaching Professor and why?
- We need to weed the print copies of periodicals in Chemical Engineering to make space, which ones do we have **perpetual rights** to online?
- Can you **post** a PDF of this **SUPO** book we have from Ebook Central on ARES?

# Clues - ERM Records

**Records** might be:

- License Agreements
- Invoices
- Titles Lists
- Kbart files
- Emails
- Meeting Agendas

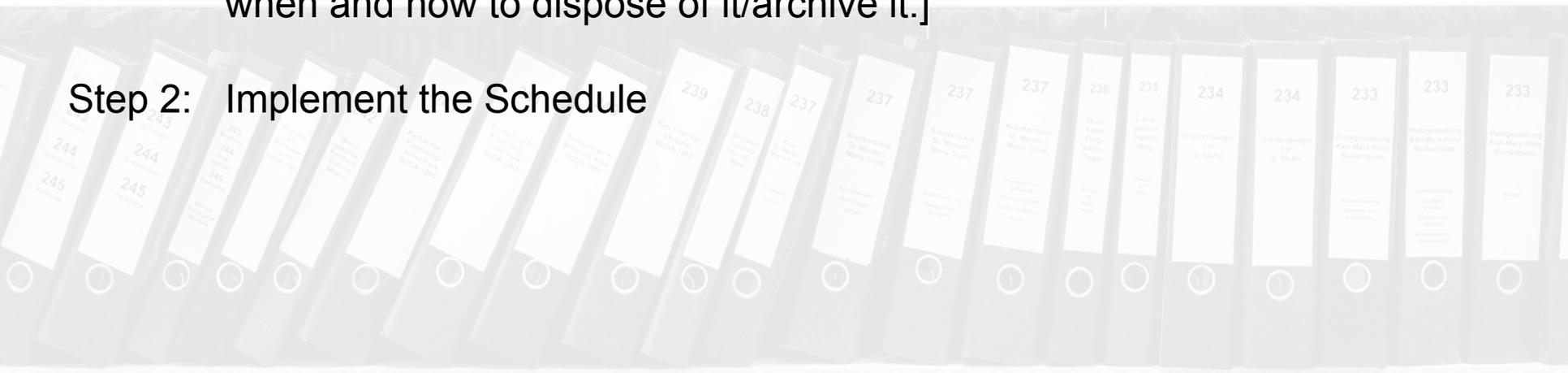
For our own use but also **evidence** in our interactions with outside parties (vendors, publishers, suppliers) and **legal** obligation (legal discovery).



# Need Records Management

Step 1: Developed a Records Retention Schedule

[Records Retention Schedule: Define what to keep, for how long, and when and how to dispose of it/archive it.]



Step 2: Implement the Schedule

# Management Records with System

- University Records Management processes handles paper records
- No University wide electronic Records Management system
- Need electronic solution - don't want to wait
- Priority: need to preserve records that document evidence of legal rights to perpetual access resources (Archives where we have right to retain access on vendor platform, dark archives or manage a copy in case of cancellation or ceased publication, operation of business etc.)
- We have very limited resources - need low effort solutions

# Functional Requirements

Must integrate with current ERM workflow; easy to use; restrict users into system

**Metadata:** Publisher, Resource, File type, File Name, Duration, File Status, Date acquired, etc.

**Search:** By metadata; Full text searchable (PDF, excel, word, etc);

**Accession/Preservation/Destruction** based on file type, status and schedule with focus on **Preservation and scheduled destruction.**

# AtoM - A Library System

- Existing experience in Archives & Special Collections
  - Low-cost, easy to deploy
  - Compatible data model (File, Record, Actor)
  - Customizable (UI, taxonomies)
  - Full-text indexing, faceted search
  - **Verdict:** workable but development required
- 

Browse

Search



Advanced search

Narrow your results by:

PART OF

All	
Title Lists	89
License Agreements	66
Invoices and Receipts	7

NAME

All	
Canadian Research Knowledge N...	25
ProQuest	14
SAGE Publishing	11
Elsevier	10
Ontario Council of University Libr...	9
Lei jin	5
Wiley Subscription Services, Inc.	3
Ovid Technologies, Inc.	3
American Institute of Aeronautics...	3
Dun and Bradstreet	2

RESOURCE

All	
ALPSP Learned Journals Collectio...	9
ScienceDirect	9
ebrary	6
Safari Tech Books Online	5
Ullmann's Encyclopedia of Indust...	3
Subject Backfile Collection	3
Meeting Papers Online	3
Hoovers	2
Cambridge Journals Online	2
SAGE Research Methods	2

MEDIA TYPE

 Showing 165 results  
Document

Advanced search options



View:



Sort by: Most recent

160 results with digital objects Show results with digital objects

	<b>IHS - ASTM Standards Collection - OCUL</b> 2017-10-12/23 · Signing date: 2008-08-28 · Draft · Part of License Agreements	
	<b>csv 01</b> 2017-12-11/189 · Draft · Part of Title Lists	
	<b>csv 01</b> 2017-12-11/187 · Draft · Part of Title Lists	
	<b>Wiley - Wiley Online Library</b> 2017-10-24/112 · License coverage: 2016-2017 · Draft · Part of License Agreements	
	<b>csv 01</b> 2017-12-04/186 · Draft · Part of Title Lists	
	<b>ProQuest - Safari Tech Books Online</b> 2017-10-19/58 · 2014-01-27 · Draft · Part of Title Lists	
	<b>ProQuest - Safari Tech Books Online</b> 2017-10-19/51 · 2012-07-18 · Draft · Part of Title Lists	
	<b>ProQuest - ebrary - Full Metadata - Holdings Export</b> 2017-10-20/69 · 2017-03 · Draft · Part of Title Lists	

# Strategic Systems Requirements Review

Strategic Analysis to define requirements of Library's Collections Systems.

In Scope: ILS, ERM systems, IR, Discovery, Reserves, ILL etc.

Not in Scope: Research Guides, Reference, Instruction etc.

Methodology used: Task Descriptions (Lauesen, 2003)

This approach allows us to define our problems and then search for technology solutions.

# Subset of Strategic Recommendations

1. Software as a service (*SaaS*) model
2. Choose the best of breed product for our needs and swap out for better technology solutions as often as possible.
4. use open source technologies for our needs *when appropriate*.
5. Where there is no significant advantage to a library service provider solution, use products outside of the library technology

# Strategic Goals

- Modularity to maximize flexibility
- Consistency across applications
- Control feature/requirements scope
- Abstract implementation from service
- Reduce maintenance & security risks
- Commodity solutions when possible



# Common Problems



Single Sign-On



Consolidated  
Identity



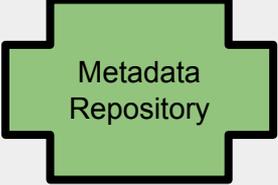
Personalized  
Context



Data Modelling



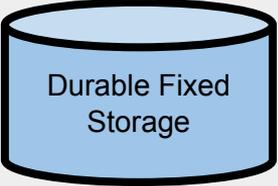
Metadata  
Querying



Metadata  
Repository



Hot File Storage



Durable Fixed  
Storage



Digital Preservation

Single Sign-On

Consolidated  
Identity

Personalized  
Context

Data Modelling

Metadata  
Querying

Metadata  
Repository

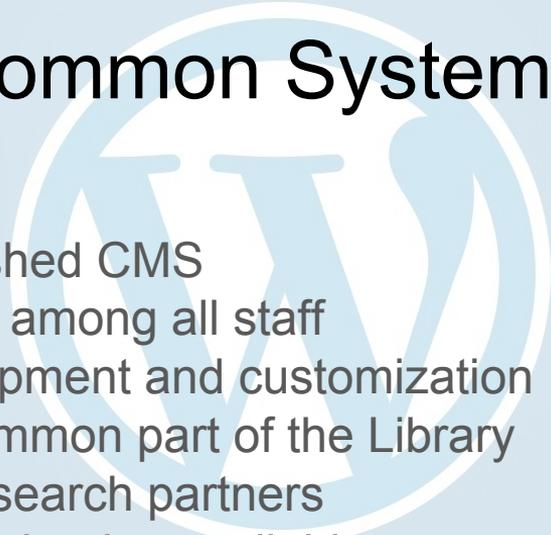
Hot File Storage

Durable Fixed  
Storage

Digital Preservation

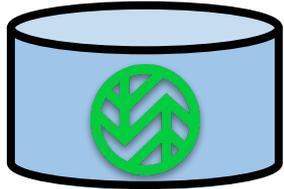


# Wordpress - A Common System



- Open source, well-established CMS
- Existing general familiarity among all staff
- Flexibility for future development and customization
- Knowledge becomes a common part of the Library
- Facilitates working with research partners
- Mature SaaS options and plug-ins available

WORDPRESS



SEARCH...

Sort by

Relevance

Filters

All Results

Type

- Actor (9)
- Document (5)

Actor type

- Corporation (3)
- Person (3)
- Consortium (1)
- Nonprofit (1)
- University (1)

Document type

License Agreement (5)

Document status

- Inactive (3)
- Active (2)

Resource

- Cambridge Journals Online (2)
- Knovel (1)

Search for - 14 results found

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# Cambridge University Press Journals License




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# Canadian Research Knowledge Network




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# Jim MacLeod

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# BBM Canada



# All Good

Freedom to do this

- Scope
- Low risk application (internal)
- Planning required to execute
- Internal culture
- Okay to fail
- Can develop and operate outside of University IT oversight

# Potential Applications

- Institutional repository
- Archival collections system
- Catalogue / OPAC
- Departmental intranet
- Faculty research projects
- ...



## Contact Us

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# Discussion

Questions?