

We Need All the Help We Can Get! - Standards That Assist in Electronic Resources Management

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Betty Landesman, "We Need All the Help We Can Get! - Standards That Assist in Electronic Resources Management" (2009).
Proceedings of the Charleston Library Conference.
<http://dx.doi.org/10.5703/1288284314803>

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WE NEED ALL THE HELP WE CAN GET! – STANDARDS THAT ASSIST IN ELECTRONIC RESOURCES MANAGEMENT

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As we are expected to work more and more with electronic resources, we need to be able to standardize and streamline our workflows in order to manage these resources. We also need to be able to work collaboratively with our publishers and vendors to accomplish this goal. This session describes new and emerging standards that are designed to support the acquisitions, licensing, and usage statistics/cost analysis processes, such as ONIX-PL (ONIX for Publications Licenses), CORE (Cost of Resource Exchange), SERU (Shared E-Resource Understanding), and SUSHI (Standardized Usage Statistics Harvesting Initiative) and how they relate to our work. The objectives are to demystify the alphabet soup of standards and to highlight those that, when adopted, will help us do our work “better, faster, cheaper” as necessity forces us to do.

Online Information eXchange for Publications Licenses (ONIX-PL)

ONIX is an XML metadata standard designed to support computer-to-computer communication of publishing information. ONIX was developed by EDItEUR, an international group working on standards for electronic commerce in the book and serials sectors, along with Book Industry Communications and the Book Industry Study Group. One example of how ONIX is used is in publishers’ sending files with tables of contents to the Library of Congress, who then make them available through 856 links in bibliographic records. ONIX standards include ONIX for Books, ONIX for Serials, and now ONIX for Publications Licenses (ONIX-PL).

ONIX-PL is an XML schema allowing a publisher’s license to be transferred to a machine-readable format and sent to a subscriber – a kind of MARC for licenses, if you will. Libraries can then load the licenses into their electronic resource management systems, and the publishers can maintain their licenses in a standardized machine-readable format.

More complete information about ONIX-PL is available at <http://www.editeur.org/85/Overview/>.

Cost of Resource Exchange (CORE)

CORE is a proposed standard for the exchange of cost, fund, vendor, and invoice information between integrated library systems, business systems, electronic resource management systems, and other interested parties such as subscription agents. The goal is to allow data to be entered once and not over and over in multiple systems by identifying the data elements exchanged among the parties who have acquisitions metadata and to create a transport protocol to move these data elements from one system to another. Draft Standard Z39.93-200x defines an XML schema to facilitate the exchange of financial information related to the acquisition of library resources between systems either within the same organization or from two different organizations, e.g., a subscription agent and a library.

Imagine being able to post an invoice for an electronic resource in your acquisitions or payment system and being able to determine the cost per use data from your ERM without having to enter it again!

Z39.93-200x is now available as a Draft Standard for Trial Use, with the trial use period running from April 1, 2009 to March 31, 2010. The text of the draft standard is available at http://www.niso.org/kst/reports/standards/kfile_download?id%3Astring%3Aiso-8859-1=Z39-95-DSFTU_final01apr09.pdf&pt=RkGKiXzW643YeUaYUqZ1BFwDhIG4-24RJbcZBWg8uE4vWdpZsJDs4RjLz0t90_d5_ymGsj_IKVa86hjP37r_hKWfHKABWbWBUj7WRFc8z2TztylJBYxlioV381oW3zB_vxv4ARbILv9cKrW2Z2QF4Q%3D%3D.

More complete information about CORE is available at <http://www.niso.org/workrooms/core>.

Shared E-Resource Understanding (SERU)

SERU is not a standard per se, but rather a “Recommended Practice” of the National Information Standards Organization. It is available as NISO RP-7-2008 at <http://www.niso.org/publications/rp/RP-7-2008.pdf>.

SERU began as a series of discussions led by Judy Luther and Selden Lamoureux at library conferences on how we might work together with publishers to lessen the burden of negotiating licenses for every electronic resource we purchase. The text of SERU was adopted in February 2008. It provides an alternative to detailed license terms which have to be negotiated over and over in favor of a mutual agreement between publisher and subscriber to follow a set of common understandings for subscribing to electronic resources. These understandings include the subscription, the subscribing institution and its authorized users, use of materials, inappropriate use, confidentiality and privacy, online performance and service provision, and archiving and perpetual access.

Publishers wishing to sell any or all of their resources using SERU as well as libraries wishing to acquire resources using SERU can sign up on a NISO registry to convey their willingness to use statements of shared understanding instead of negotiated licenses. At the time of writing, the registry included 44 publishers and content providers and 131 libraries and consortia. The SERU registry form is at <http://www.niso.org/workrooms/seru/registry/signup>.

More complete information about SERU is available at <http://www.niso.org/workrooms/seru>.

Standardized Usage Statistics Harvesting Initiative (SUSHI)

SUSHI (Z39.93-2007) is a protocol for harvesting electronic resource usage data. It provides a standardized format to allow the harvesting of COUNTER-compliant usage statistics without the need for a library to gather tens or hundreds of spreadsheets from individual publishers. The COUNTER Code of Practice is a set of protocols designed to measure usage in a consistent way.

Use of the SUSHI standard by libraries requires a vendor system that supports it and publishers that make their usage statistics available to librarians using SUSHI. Release 3 of the COUNTER Code of Practice for Journals and Databases was released in August 2008. NISO’s SUSHI Standing Advisory Committee announced the release of schemas to support Release 3, which requires content providers to implement SUSHI to delivery their statistics reports, in November 2008. The deadline for publisher implementation was August 31, 2009.

The text of the Z39.93-2007 SUSHI standard is available at http://www.niso.org/kst/reports/standards/kfile_download?id%3Austring%3Aiso-8859-1=Z39-93-2007.pdf&pt=RkGKiXzW643YeUaYUqZ1BFwDhIG4-24RJbcZBWg8uE4vWdpZsJDs4RjLz0t90_d5_ymGsj_IKVa86hjP37r_hI9wQuWOt-ED6oLx17YyVIII EAytQp1kLJGhhtjwcl3V.

The COUNTER Code of Practice is available at http://www.projectcounter.org/code_practice.html. The register of vendors providing usage reports compliant with Release 3 of the COUNTER Code of Practice is available at <http://www.projectcounter.org/r3/cv.pdf>.

More complete information and tools to assist libraries and publishers in the implementation of SUSHI is available at <http://www.niso.org/workrooms/sushi>.