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# Implementing the 360 Suite at Indiana State University

by **George Stachokas** (Electronic Resources Librarian, Indiana State University) <George.Stachokas@indstate.edu>

**I**ndiana State University (ISU) acquired **Serials Solutions 360 Resource Manager**, their e-resource management (ERM) system, in January 2009, along with four other tools: **360 Core**, **360 Link**, **360 Counter**, and **360 MARC Updates**. Taken together, this **360 Suite** has changed every aspect of our work in the Electronic Resources Unit (ERU). The ERU includes me and one Electronic Resources Associate, **Cheryl Bealmear**, along with one or two student assistants, depending on the particular semester. By reviewing our progress in implementation and the impact of this new system on ISU, I hope to provide insight to others who may be considering acquiring the **Serials Solutions ERM** and other components of the **360 Suite**.

Recognizing that implementation was going to be a daunting task, we gave ourselves plenty of time to prepare prior to announcing the new system to our patrons. **360 Resource Manager** and **360 Counter** were entirely new tools for ISU, but we already subscribed to an A-Z list, link resolver, and MARC records service that were replaced by **360 Core**, **360 Link**, and **360 MARC Updates** respectively.

To ensure a smooth transition and reduce any potential negative impact on our patrons, we delayed taking the new system public until well after the spring semester was over when most students and faculty would be off campus. Furthermore, we took **Serials Solutions** live in early June while retaining a subscription to our previous services lasting through July 31, 2009, just in case of any unexpected problems or delays.

Soon after the license agreement was signed, we drafted a formal plan for implementation that broke the work down into discrete tasks with deadlines. Every individual involved in the process had a sense of what they were responsible for and what was expected of them in terms of results. **360 Core**, **360 MARC Updates**, and **360 Link** were implemented first since these tools replaced services that our patrons had become used to. We had hard deadlines for these tools and we met those deadlines. Having assumed that populating data in **360 Resource Manager** and **360 Counter** would be more time consuming, we allowed ourselves more flexible deadlines.

**360 Core** provides access to the single largest knowledge base in the industry, **KnowledgeWorks**. Essentially, **KnowledgeWorks** is a vast universe of metadata, including URLs, for hundreds of thousands of databases, electronic serials, and eBooks. Having so many accurate links at our disposal has made it easy to add new resources, including thousands of unique open access titles to our collection.

Looking at **360 Core** from the back end, all electronic serials and eBooks are assigned

to a unique database which is, in turn, assigned to a unique provider. A database in **KnowledgeWorks** is a level of organization, not necessarily representative of an associated search interface or a formal collection of titles offered by vendors as a single package. For each database available in **KnowledgeWorks** through **360 Core**, library staff can select a status of subscribed, under review, trial, license negotiation, among other choices. These different status categories provide a more accurate depiction of our collection, e.g., a cancelled database retains associated cost history and other data populated in **360 Resource Manager**, while an untracked database is not directly referenced. We can also create databases to reflect unique local holdings.

The public or front end of **360 Core** is the E-Journal Portal, essentially a stripped down Web page provided by **Serials Solutions** that includes four optional search-and-discovery tools that enable patrons to find e-journals by title or ISSN, browse e-journals by title, browse e-journals by subject, and includes a database list. We had to create our own style sheet using CSS and added additional HTML code to create a new Web page for electronic resources. This new E-Resources Web page was designed to provide one-stop shopping for databases, electronic serials, and eBooks for our patrons. The browse "e-journals by title" tool sorts on the first three characters in the name of a particular journal, thus producing long and meaningless lists beginning with "jou" or "int," but the other three search tools are useful.

The ISU library pursues dual representation for electronic resources: every e-resource should be represented in our E-Journal Portal and within the library catalog. While we do not have a MARC record for every e-resource, we have come closer than ever by using **360 MARC Updates** bibliographic records that our library staff can upload into our ILS. We were able to select our own detailed standards by submitting customization reports to **Serials Solutions**. By deciding to use hosted 856 fields, we have cut the work of updating hyperlinks in our MARC records by half, since every link is now a redirect to the corresponding title listed in our E-Journal Portal.

**360 Link**, our **Serials Solutions** link resolver product, has improved the ability of our patrons to find the specific content that they need. For those who may not recall, a link resolver parses elements of an OpenURL, thus supporting mediated linking between sources and targets; essentially checking to see where and how a particular article listed in an abstracting and indexing service might be available in a library's total collection. Our **360 Link** is configured to look like a Web page. It only appears when our patrons, having searched a

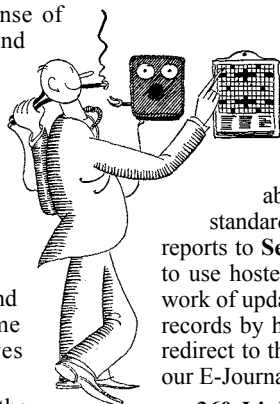
database, proceed to check if a particular article is available in full text somewhere within our collection. **360 Link** is currently configured to offer direct links to the article if this content is available or to the associated journal or database. Additionally, we can direct our patrons to search the online catalog for print holdings or submit a request through **Illiad**, our interlibrary loan service. In order to function, a link resolver must be set up to work with each database or content provider. Of course, some electronic resources do not work with link resolvers. Overall, setup was easy. The only significant problem that we encountered was the mapping and auto population of data fields between **360 Link** and **Illiad**, but **Serial Solutions** tech corrected that for us.

**360 Counter** is a tool for the retrieval, storage, and manipulation of usage statistics that can be mapped to data in **360 Core** and **360 Resource Manager**. Data in these tools can then be manipulated in different ways in the associated **PivotLink** tool, e.g., cost-per-use calculations, graphs, and charts. The realization of the full potential of **360 Counter** has been somewhat delayed due to the fact that most vendors have only recently become **SUSHI** compliant and **Serials Solutions** has not yet integrated a **SUSHI** harvesting client into **360 Counter** at the point of purchase. In the meantime, data must be retrieved by **Serials Solutions** for an additional fee or by library staff and then uploaded into **360 Counter**. **Serials Solutions** did release code for an **Open-Source SUSHI** client in May 2009; however, and we are considering using that code to build our own **SUSHI** harvesting client.

**360 Resource Manager** (the ERM) has a number of valuable features, not the least of which is the ability to run comprehensive reports on data entered throughout the **360 Suite** of tools. Ever since we began to enter detailed license terms into the system, our interlibrary loan staff have been able to run reports that specify what electronic resources are currently available for interlibrary loan via print, secure electronic, or other electronic means. Since the language in our license agreements is seldom consistent and requires considerable interpretation, many licenses require careful reading to extract the raw data necessary for entry. Given all the data fields that are available and the high degree of variability among our license agreements, I have chosen to limit data entry to specific fields for permitted uses by patrons and then simply scan and post the entire license online for further reference.

Cost data can be entered manually into **360 Core**, but **360 Resource Manager** also allows library staff to upload cost data using templates in comma delimited text format. While this does not work well across databases, it is a great time saver for entering data into single databases that include many titles. We had anticipated being able to run reports in our cur-

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rent Integrated Library System to further automate the process, but for various reasons, we have had to resort to a mostly manual process, although using templates still saves time.

**360 Resource Manager** also provides for the organization of electronic resources into specific collections; since the ISU library is a member of multiple consortia, I have found it useful to use this feature to track some of our collective subscriptions. Notes created in **360 Resource Manager** can be attached to specific electronic resources, and we have used special notes to cross-reference cost data.

Information about contacts and alerts for renewals are also available in this tool. Menus enable library staff to customize data fields. Just as one example, we created a complex color coded filing system for our print records in 2009, and I was able to reference the same color codes in **360 Resource Manager** by using a custom data field. Cost data fields can be customized to accommodate the names of specific vendors. I have recently added forty-four vendor names that match the current designations in our Integrated Library System to improve cross-referencing of financial data.

Some other notable features of the **Serials Solutions 360 Suite** include the client center that I have briefly referenced earlier. The client center is entirely Web-hosted, so I can essentially log in and work from anywhere that I have an internet connection. The only drawback of the Web-hosted solution is that I must remind our patrons and other library staff that any changes or updates to the system usually take around one day to become visible. The client center also allows library staff to take full advantage of the fact that all the **360** tools are well-integrated into a common interface, e.g., a license created in **360 Resource Manager** can be attached to a resource in **360 Core** or vice versa. As we continue to populate our system with more data, we can also consider other characteristics of our electronic resources such as impact factor or perhaps eigenfactor. Titles necessary for accreditation could be omitted from cost-per-use calculations. There are many as-yet-unrealized opportunities for improving and streamlining our management of electronic resources using this system that I look forward to implementing in the future.

Overall, I am highly pleased that we chose **Serials Solutions 360 Resource Manager** as our ERM.

**360 Core**, **360 Link**, and **360 MARC Updates** are working very well and have greatly improved service for our patrons in most areas, except for the E-Journal Portal. This tool could be improved by providing greater customization features. **360 Counter** with **PivotLink** and some of the features of **360 Resource Manager** are not yet fully implemented, but our interlibrary loan staff have already started to use electronic resources to satisfy requests from other institutions — a first for our library. The overlap analysis tool has already saved our library thousands of dollars by identifying duplicate subscriptions and permitting more accurate assessment of potential acquisitions. Clerical work that once took many hours, if not days, can now be done in minutes. Our ERM is enabling us to succeed, not just survive, in the midst of a difficult economy that has reduced our library budget and personnel. 🍀

## Re-Inventing the ERM: EBSCO Takes a New Approach to E-Resource Management with the Release of ERM Essentials

by **Oliver Pesch** (Chief Strategist, E-Resources; EBSCO Information Services) <opesch@ebSCO.com>

It has been nearly six years since **ERMI** published their groundbreaking report that includes a detailed data dictionary and functional specifications for electronic resource Management (ERM) systems.<sup>1</sup> And it has been nearly six years since the first commercial ERM module was introduced to the market. Yet, librarians continue to struggle with the problem of managing their e-resources — including many who have implemented some form of ERM system. With so much time and energy spent, why is the problem largely unsolved?

This was the key question that we asked ourselves as we embarked on the development of **EBSCONET ERM Essentials**. We could have built an ERM system similar to others on the market, but we didn't want to come out with a product until we knew we could deliver something that actually makes a difference. **ERM Essentials** is the result of our investigation and development efforts — an ERM that we believe truly makes a difference to e-resource management.

In order to solve the outstanding problems, we first needed to understand what they were. The **ERMI** report provides a comprehensive list of data elements needed to describe and manage e-resources. The flowcharts and functional specifications were fairly clear regarding what an ERM system should do. From this perspective, **ERMI** had it right. When we surveyed our customers, other than an occasional comment that there are too many data elements, it became clear that the **ERMI** specifications were not the problem. Instead, we heard from our customers that some of their challenges were related to:

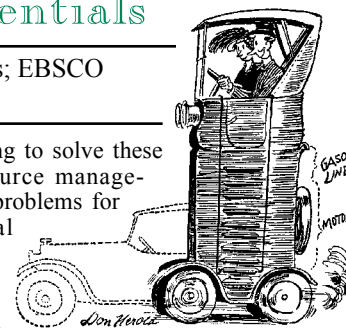
- The time it takes to gather and enter the data needed to effectively manage e-resources (information such as supply terms, license details, access and registration information).
- Managing their e-journal package renewals and ensuring they were adhering to the terms of their agreements.
- Keeping up with changes in their e-journals, such as titles moving from one publisher to the next (this also affects the renewals of e-packages).
- The time it takes to update holdings and related data to the various systems their patrons use for accessing the content they subscribe to.

When we examined the nature of **EBSCO's** role in the information supply chain, (we are the intermediary between publishers and libraries), we realized that we have been

working to solve these e-resource management problems for several years. These solutions

are already available in the form of enhancements we have made to our subscription services. For example:

- **EBSCO** captures license details and terms of use for thousands of publishers representing tens of thousands of e-journals. These details are coded to the related **ERMI** fields and are made available to our customers through our **EBSCONET** subscription management interface.
- **EBSCO** captures access and registration details that include URLs and instructions for registering journals, information on supported authentication types, information about archiving and perpetual access, and more. This information is also viewable through the **EBSCONET** interface.
- We added an "Order Activation" module that allows customers to track the workflow of registering their e-journals and titles in their e-journal packages.
- For many years, **EBSCO** has been keeping track of the individual titles that make up their e-journal packages, including those that are "access only" (titles that the publisher includes in a package in addition to the "subscribed" titles).
- A recent feature added to our **EBSCONET** subscription management application is E-Package Renewals. This is an application that was specially designed with input from publishers and librarians to handle the annual renewal process for e-journal packages — it enforces the terms of the contract and guides the librarian through the process quickly and accurately.
- Another service our role as part of the e-journal supply chain allows us to provide is the calculation of coverage entitlements using our knowledge of publisher access models, content availability, and a customer's order history.



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