ALCTS Serials Standards Forum
ALA 2004

Oliver Pesch
EBSCO Information Services
opesch@ebSCO.com

Overview

- ERMI and ONIX initiatives
- The e-resource life-cycle
- Standards related to the life cycle
Standards categories

- Identifiers
  - Books, Serials, Articles
- Information interchange
  - Acquisition, Management, Access

E-resource life cycle

- Acquire
- Evaluate
- Monitor
- Provide Access
- Provide Support
- Administer
- Order
- License terms
- Price
- Trial use
- Assess need/budget
- Pay
- Evaluate
E-resource life cycle

Acquisition related standards

- Holdings information (ONIX SOH)
- License terms (LibLicense)
- License terms (EMRI)
- Order information (EDIFACT, ONIX SPS)
- Invoice data (EDITFACT)
E-resource life cycle

**Access related standards**
- Registration/IP Addresses (???)
- Search (Z39.50, Z39.89, SRW/SRU)
- Metasearch (NISO Metasearch initiatives)
- A-to-Z configuration (ONIX SOH)
- Library catalog (MARC, Z39.85, METS, IMLS)
- Digital archives (OAI)
- Link Resolver configuration (ONIX SOH)
- Link Resolver access (OpenURL)
- Authentication ( Shibboleth, SAML, EduPerson)
- Interlibrary loan
- Bibliographic manager (???)
- Bibliographic references (???)

**Ongoing administration related standards**
- Managing holdings (ONIX SOH)
- Check-in (SRN)
- Access rights/restrictions (EMRI License terms)
- Claiming (EDIFACT)

- IP Addresses
  - Register
  - Proxy Servers
- Catalog
- Portals/Access lists
- Campus authentication
- URL maintenance

- User IDs
  - Admin module information
  - Preferences (store)
  - Holdings lists
  - Access restrictions
  - View rights for use
  - Claiming
E-resource life cycle

Support related standards
• Networked reference services

Evaluate Monitor
Provide Support
Administer

Problem log
Hardware needs
Software needs
Contact info
Troubleshoot/triage

Provide Access

E-resource life cycle

Evaluation related standards
• Usage statistics
• Z39.7
• COUNTER
• Iocolc
• ARL E-Metrics

Evaluate Monitor

Problem log
Usage stats
Downtime analysis
Review problems

Provide Support
Administer
E-resource life cycle

Acquire
- LibLicense
- EMRI
- SOH
- EDIFACT

Evaluate
- Monitor
- Usage stats
- Downtime analysis
- Review problems
- Problem log
- Hardware needs
- Software needs
- Contact info
- Troubleshoot/ triage

Provide Access
- Trial use
- Price
- Evaluate
- IP Addresses
- Register
- Proxy Servers
- Catalog
- Portals/Access tools
- Campus authentication
- URL maintenance

Provide Support
- Administer
- User feedback
- Admin module information
- Preferences (store)
- Holdings lists
- Access restrictions
- View rights for use
- Claiming

Administer
- User IDs
- Admin module information
- Preferences (store)
- Holdings lists
- Access restrictions
- View rights for use
- Claiming

Networked Reference
- Z39.7
- COUNTER
- ICOLC
- ARL

Thank you
opesch@ebsco.com