Managing E-Resources in Consortium Environment

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Purpose of this presentation

- To introduce an in-house system for managing e-resources in consortium environment
- To show an example of how to share information between libraries and portal maintenance/licensing
- To introduce a workflow between e-resource licensing and portal maintenance
- Get feedback of the interest of other consortia for Halti
Agenda

• Consortium environment in FinELib
• Overview of licensing in FinELib
• Product overview – what is Halti
• Managing e-resources with Halti
• Some technical facts of Halti
• Utility for consortium libraries
• Development and the future of Halti
• Demo
Consortium environment in FinELib

- FinELib is a national consortium which supports research, teaching and studying in Finland by promoting the availability of high-quality information and its use in society.
- The members of the consortium are Finnish universities, polytechnics, public libraries and a large number of research institutes.
- The FinELib service unit negotiates license agreements centrally on behalf of the consortium member organizations for Finnish and foreign electronic journals, databases, e-books and other electronic resources. The member organizations select suitable e-resource packages for their own customers’ needs.
- The FinELib service unit offers the electronic resources to be used via the National Information Retrieval Portal NELLI
Consortium environment in FinELib

• National programme (since 1997)
• Permanent department of the National Library of Finland (2000)
• Nelli project began 2002, first library went live in 2004
• Service centre for libraries
• Aims to license high quality e-resources and develop ease of usability
• 108 members within licensing (universities, polytechnics, public libraries and research institutions)
• 67 members in Nelli consortium
• Consortium principles
• Service agreements for both licensing and Nelli
• Agreements: 60 (majority 2-3 years)
• Usage (2006)
  – 6,2M downloads
  – 42M searches
Strategic environment of FinELib

FinELib Consortium

Members of the FinELib Consortium
- Universities, polytechnics, research institutes and their libraries, and public libraries
- More than 100 organisations

Ensuring acquisition and use of resources
- Acquisition of online resources
- Facilitation of the use of online resources

The National Library
- FinELib service unit
- Nearly 20 experts

Rectors' Councils
Other stakeholders
Ministry of Education Financiers
International co-operation partners

Researchers
Teachers
Students
Software suppliers
Publishers
Overview of licensing in FinELib

- **Resources in production**
  - Nov. – Jan.

- **Negotiating agreements**

- **Selecting new resources**
  - Nov. - Feb.

- **Calls for bids**
  - March - May

- **Renewals of agreements**
  - March - Dec.

- **Initial negotiations**
  - June – Nov.
  - Tryouts, testing

- **Founding consortia**
  - Aug. - Nov

- **MetaLib: configurations**
  - SFX: e-journal lists

- **MetaLib/SFX compatibility**
- **MetaLib/SFX testing**
- **MetaLib/SFX collecting contact information**

- **Statistics** constant
- **Training** constant
Product Overview – what is "Halti"

• Halti stands for “managing resources”
  – Administrative database for both FinELib licensing team and Nelli team
  – 1. version 2000 to “cut down the routine procedures”
  – Simple database: organizations, resources, and costs
  – 2002 requirements grew due to increase of consortia
  – Today 2. version: a tool for FinELib and libraries
  – User + admin levels (1 of per library)
    • Admin (1 per library) can create users and update contact information
    • Browsing can update contact information

• Maintenance and managing
  – Maintenance outsourced
  – Managing and development in FinELib and Nelli
Utility for consortium libraries

- Some examples of the information (library specific):
  - Organizational information
  - Subscription information:
    - Cost for each subscription
    - Costs for sector specific and library specific subscriptions (reports)
    - Combined costs per year / institute / subscription (reports)
    - Costs for similar type of resources (reference/full text databases etc.) (reports)
  - Statistics (usage reports from publishers)
  - Key figures and trends of the usage of resources (reports)
  - IP reports for publishers
  - Contact and billing/invoice addresses
Portal Management and Halti

• With Halti it is possible to
  – Share SFX/MetaLib specific information
  – Share contact information
  – Handle IP’s (additions, deletions, changes, check overlapping)
  – Generate and update default_z312 and IP filters in MetaLib
  – Use a tool for handling e-journal lists (coming)
  – Send emails to members of consortia
  – Check libraries’ subscriptions (FinELib consortia)
Recent developments

- Enrolment to resource (database) consortia (two-phase and very information intensive and interactive process)
- IP management (default_z312, IP Filters, reports to publishers for IP authentication)
- Separate test environment created 2007
- UserID’s for all public libraries (previously via regional libraries)
- Export data from Halti to the FinELib’s web site
- Produce downloadable lists for SFX DataLoader automatically (from e-resources that are subscribed only partly, that is not the full package) – under construction
Development and the future of Halti

- Technical co-operation with software company
  - enhancement requests and proposals via email and meetings
- Compare e-resources (contents) and members of consortia in consecutive years
- Improve the user interface
- Add new reports
- Add new utilities on the basis of library feedback
- Continue automating straightforward procedures
- Standards … Counter … Sushi?
Some technical facts of Halti

- HTTP server: Apache/2.0.46
- PHP: 5.2.2
- SSL: OpenSSL 0.9.7a Feb 19 2003 / TLSv1
- Oracle: Oracle8i Release 8.1.7.4.0 - Production
- Linux
- Authentication: Username/password (Possible also by IP)
- Maintenance and implementation of enhancements outsourced
- Interfaces: 1) Admin 2) Test 3) Library/User (all Finnish)
# Database tables

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E-resource table
Organization table

Diagram showing relationships between entities:
- Organ_cont_person
- Organ_fees
- Organ_ip
- Eresource
- User_register
- Organization
- Organ_fte

Relationships:
- 1 to 0..* for Organ_cont_person
- 0-1 for Organ_fees
- 0..* for Organ_ip
- 1 to 1 for Eresource
- 1 to 1 for User_register
- 1 to 1 for Organization
- 1 to 0..* for Organ_fte
Demo