



Verde in a Consortial Environment: First Experiences



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Partners and problem situation

Consortial model

Verde electronic resource management system (ERM)

Preparation and current status

Experiences and results

Summary

FAK consortia in the German federal states Berlin and Brandenburg, Germany

Friedrich-Althoff-Konsortium e.V. (FAK)

Aim of the association:

To improve information supply in the Berlin and Brandenburg region, including joint acquisition of electronic resources. Currently there are 21 members; further 19 institutions in Berlin and Brandenburg plus around 200 institutions from Germany, the Netherlands, Austria, and Switzerland participate in license agreements concluded by the FAK.

Libraries in this Project

Freie Universität Berlin (FUB): 34000 students

Charité (joint medical faculty of FUB and HUB): Students from FU and HU, 10000 FTE

Option: Humboldt University Berlin (HUB): 34000 students

Option: Technical University Berlin (TUB): 28000 students

Kooperativer Bibliotheksverbund Berlin Brandenburg (KOBV — Berlin-Brandenburg library network)

Cooperative library network of the two German federal states Berlin and Brandenburg. Give technical support for Verde and SFX

e-Resources management: general problems

Quantity problem

The FU has ca. 250 licenses with ca. 14,000 e-journal titles: ca. 8000 with local licenses

The FAK has ca. 30 licenses for e-books (ca. 2,000 titles), databases, journals (ca. 8,000 titles); ca. 450 licensing relations with ca. 300 institutions

License duration problem

License agreements since 1998 where access is still valid

License agreements where list of titles changes

Archiving rights, parallel and overlapping access periods

Problems with managing data related to licenses

Duration, term of access, offer, sharing, of costs, journals included, access information, provider information (addresses, contact person), client information (address of location and for invoicing, contact persons, IP addresses), administration access

Problems with rights and responsibilities of use

Walk-in users, inter-library loans, restricted access, simultaneous access

Coupling with print subscriptions

Working problems

Information, forwarding data to licensors

Revisions, reclamations, error-correcting, inputs to records

... and all data changes at more or less regular intervals!!

FAK office

FAK office must be asked for contract information from different libraries all the times.
Problem with work load.

Support of complicated procedures through workflow functions

Generation of lists of addresses, IP addresses, and titles for licensing partners

Reduction of work load through cooperation in the consortium: it is possible to check through local and consortial instances, take-over of data, and synchronizations together

Documentation of shares of costs and details of invoicing are necessary

FUB (and participating libraries in general)

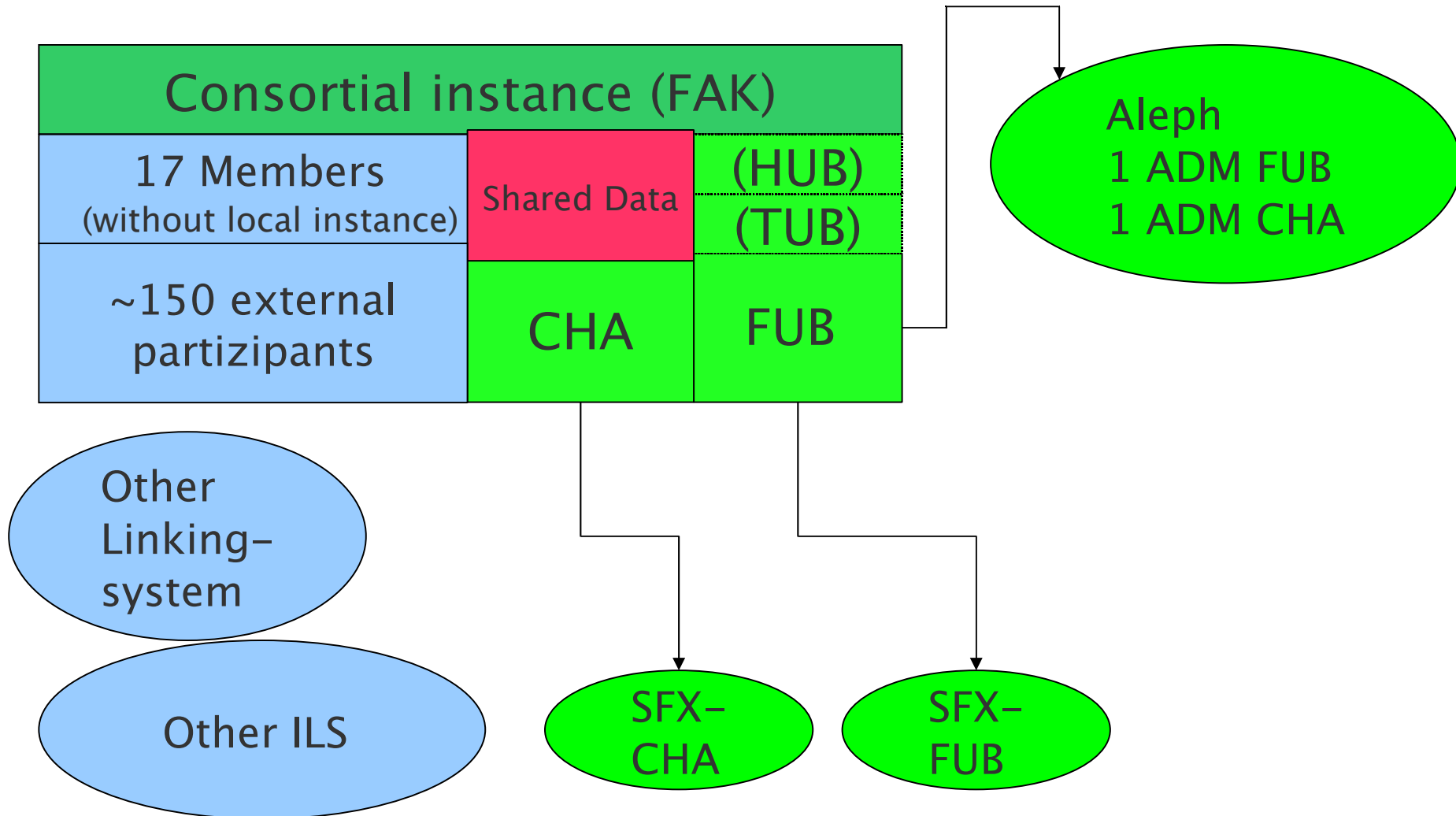
Connection to Aleph is primarily for processing invoices

Accounting and entry is done in ILS (connection to SAP is planned)

No human resources available to undertake data maintenance of several records systems and the end-user tool SFX. The FUB has 30.000 SFX request per month.

- Verde has a built-in consortial support
- Interfaces: SFX, Aleph/Voyager, SOAP, SUSHI
- Verde is based on the ERMI standard for storing license-related data
- Additional functions
 - Self-input of local data
 - Task manager for routine tasks
- Saving of labor capacity
 - Utilization of the Central Knowledge Base (CKB)
 - Upload and report functions
- Future functions
 - Link-up with print subscriptions; these are the basis of many licenses
 - Cost-benefit analysis through uniform interpretation of statistics — SUSHI and COUNTER; Problem: not schematically comparable, not the sole criteria for purchase, data are incomplete and non-uniform
 - Analysing history for further purchasing strategy

FAK Consortial model with a central instance – the asymmetric model





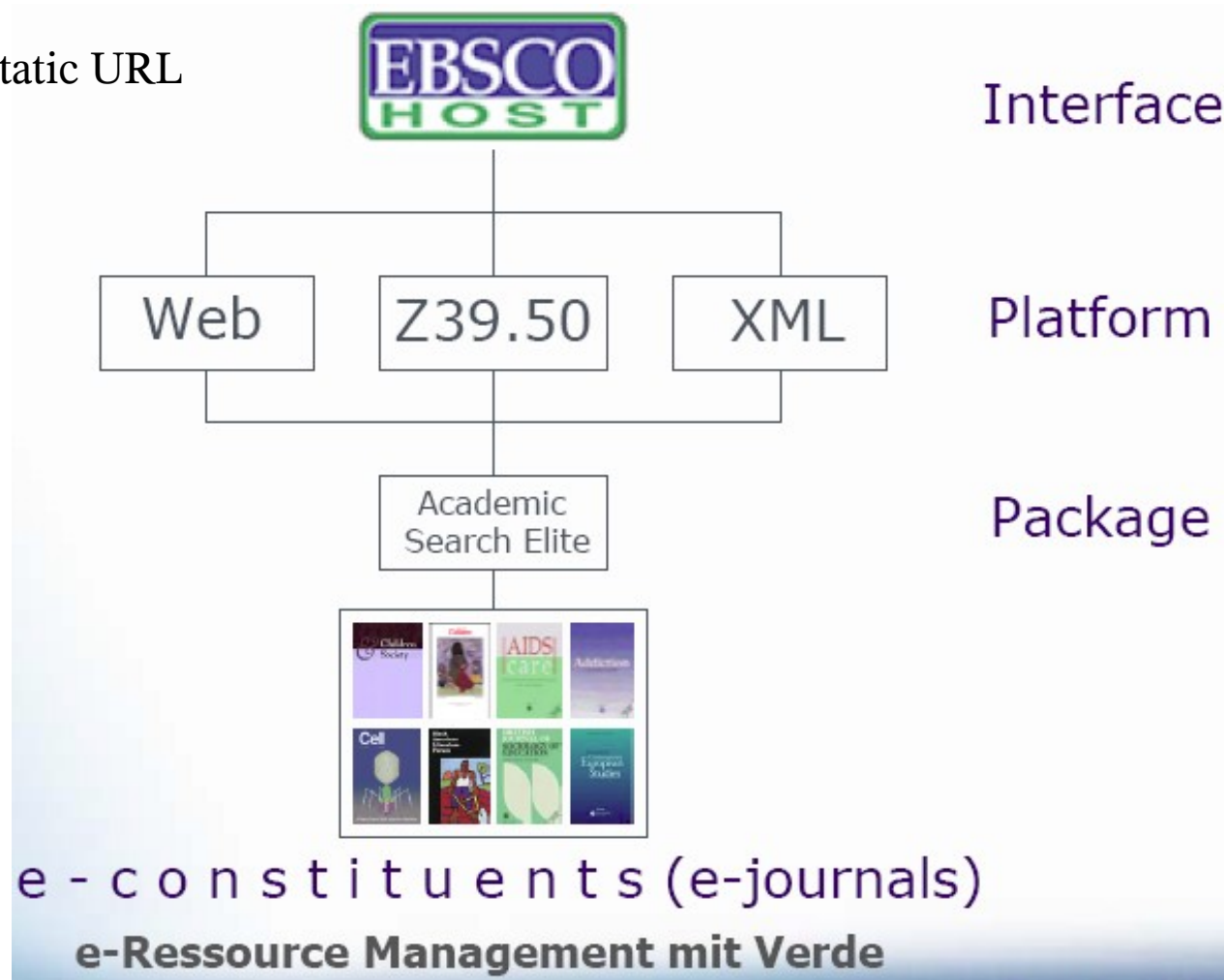
Central Knowledge Base (CKB)

Central Knowledge Base (CKB)

Centrally maintained database with objects, providers, and progression reports

Monthly local update

Parameter-oriented, no static URL



Quelle: Ahrens, Peter:
Introduction to Verde for
Swiss Consortia (2007)

First step: search

Acta*

Managing: e-Products

Find: By: All Type: Contains e-Product Type: All

Search results for (Acta*): at Members (FUBIB_Test), KB
Found 2,849 e-Products.

Title	e-Package	Holdings	e-interface	Actions
Acta agriculturæ Scandinavica. Section B, Soil and plant science [0906-4710, 1651-1913]				New
1998-12 m. ago	EBSCOhost Academic Search Alumni Edition		EBSCOhost	
1998-12 m. ago	EBSCOhost Academic Search Complete	FUB(C) [Production]	EBSCOhost	
1998-12 m. ago	EBSCOhost Academic Search Elite		EBSCOhost	
1998-12 m. ago	EBSCOhost Academic Search Premier	FUB(L) [Production] FUB(C) [Trial]	EBSCOhost	
1998-12 m. ago	EBSCOhost Academic Source Premier		EBSCOhost	
1998-12 m. ago	EBSCOhost Advanced Placement Source	FUB(C) [Production]	EBSCOhost	
v. 49:1 (1999)-	EBSCOhost Electronic Journals Service		EBSCOhost	
1998-12 m. ago	EBSCOhost MegaFILE		EBSCOhost	
1998-12 m. ago	EBSCOhost Science & Technology Collection		EBSCOhost	
v. 49:1 (1999)-	Informaworld Journals		Informaworld	
1999-	Ingenta Connect Taylor & Francis Ltd		IngentaConnect	
v. 49:1 (1999)-v. 56:3 (2006)	IngentaConnect Journals	FUB(L) [Evaluation]	IngentaConnect	
1999-	OCLC FirstSearch ECO		OCLC	
v. 46:3 (1999)-	SwetsWise		SwetsWise	

Filter

Work Record:
bibliographical description

Constituent
Aggregator package
Selectiv package

Holding information
central instanz
local instanz

List of titles of a package



Filter

Managing: e-Products

EBSCOhost Academic Search Alumni Edition EBSCOhost

Status: Production e-Package type: Selective Acquisitions: Active License: Approved Sync Status: Sync required

Jump to: Go 1 - 15 of 3,380 records.

Filter by e-Product status: All Filter by Selection status: All Display Local Display All Update

Title	Identifier	e-Product Status	Selection Status	Coverage	
AANA journal	0094-6354			2001-	Update +
The ABNF journal	1046-7041			2002-	Update +
About campus	1536-0687			1997-12 m. ago	Update +
Abstract Machine Models for Parallel & Distributed Computing	90-5199-267-X	Production	Final Approval	v. 25:1 (2001)-	Update +
Academe	0190-2946		Rejected	2002-	Update +
Academic leader	8750-7730	Trial	Evaluation	2002-	Update +
Academic questions	1936-4709	Production	Approved	1987-6 m. ago	Update +
Accent on living	0001-4508	Production	Approved	1990-2001	Update +
Acta agriculturæ Scandinavica. Section A. Animal science	1651-1972	Production	Approved	1998-12 m. ago	Update +
Acta agriculturæ Scandinavica. Section B. Soil and plant science	1651-1913	Production	Approved	1998-12 m. ago	Update +
Acta agriculturæ Scandinavica. Section C. Food economics	1651-288X	Production	Approved	2004-12 m. ago	Update +
Acta anaesthesiologica Scandinavica	1399-6576			1999-12 m. ago	Update +

Title display,
sort by Titel
or ISSN/ISBN

Status information

Holding information

Processing functions



e-product record: general information about the product

Bread crumb tail for orientation

Short information

Option menu

Breakdown of information with tabs and subsections

Managing: e-Products

EBSCOhost Academic Search Alumni Edition EBSCOhost

Status: Production License: Approved Last Sync: Done Sync Status: Synced SFX setup required (23/05/2008 15:01:11) Active: 06-Mar-2008 Local Holdings + embargo: 1999- e-Package type: Selective Acquisitions: Active

Summary
e-Product
Acquisitions
License
Access
Admin
Trial
Cost
Usage
Workflow
Sync History

General Information Interoperability Libraries

Belongs to e-Interface: EBSCOhost
e-Package type: Selective Aggregator
Selective e-Package type: Complete Partial
Selection status:
e-Product status: Production 06-Mar-2008 Update
Activation from date: 06-Mar-2008
Expiration date:
Availability: Down
From:
To:
Availability note:

Global coverage:
From: Volume: Issue:
To: Volume: Issue:
From: Volume: Issue:
To: Volume: Issue:
From: Volume: Issue:
To: Volume: Issue:

Local Holdings:
From: 1999 Volume: Issue:
To: Volume: Issue:
From: Volume: Issue:

Annotations:
- Bread crumb tail for orientation: Points to the breadcrumb trail.
- Short information: Points to the status bar.
- Option menu: Points to the left-hand navigation menu.
- Breakdown of information with tabs and subsections: Points to the 'General Information' tab and its subsections.
- e-Package type: Points to the 'e-Package type' field.
- Status and period of validation: Points to the 'Activation from date' and 'Expiration date' fields.
- Coverage (global) and holding(local): Points to the 'Global coverage' and 'Local Holdings' sections.
- SFX synchronisation button: Points to the refresh button in the top right of the main content area.

Acquisition record

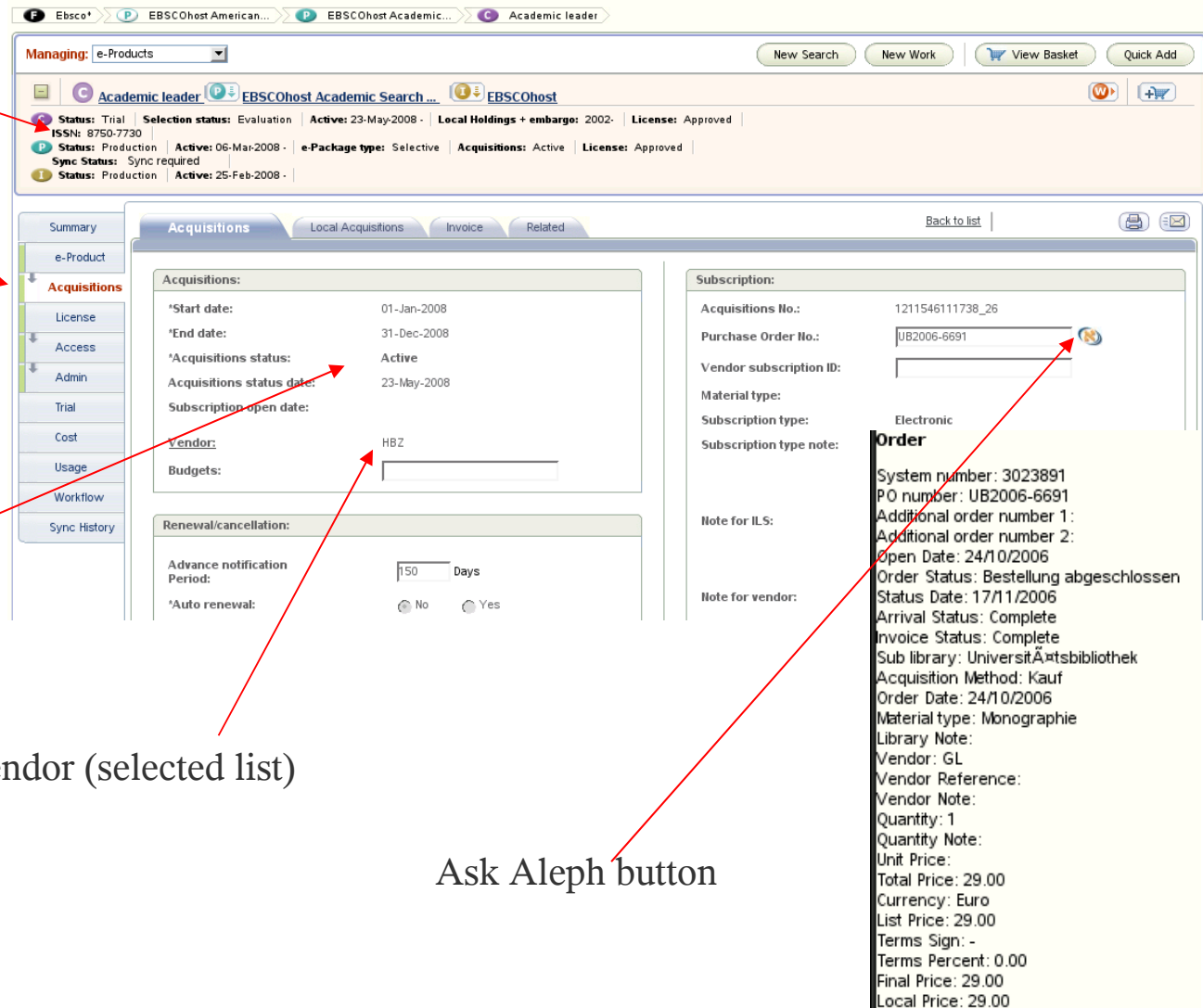
Overview

Inherent information or overwriting

Licence status: 'active' status prevents information being changed

Vendor (selected list)

Ask Aleph button



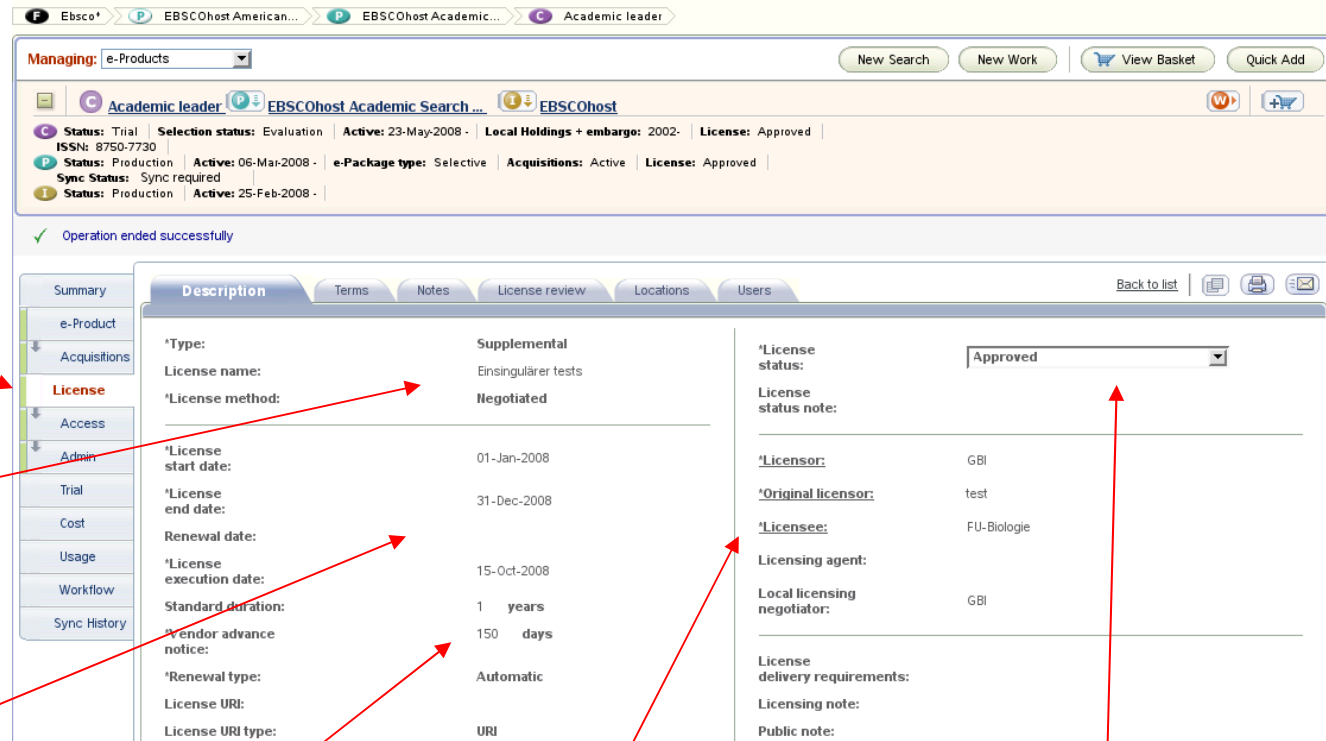
The screenshot shows the EBSCOhost Academic Search interface. At the top, there are navigation tabs for 'Managing: e-Products', 'New Search', 'New Work', 'View Basket', and 'Quick Add'. Below this, the product details are displayed:

- Status:** Trial | **Selection status:** Evaluation | **Active:** 23-May-2008 | **Local Holdings + embargo:** 2002 | **License:** Approved
- ISSN:** 8750-7730
- Status:** Production | **Active:** 06-Mar-2008 | **e-Package type:** Selective | **Acquisitions:** Active | **License:** Approved
- Sync Status:** Sync required
- Status:** Production | **Active:** 25-Feb-2008

The main content area is divided into several sections:

- Summary:** A sidebar menu with options like 'e-Product', 'Acquisitions', 'License', 'Access', 'Admin', 'Trial', 'Cost', 'Usage', 'Workflow', and 'Sync History'.
- Acquisitions:** Contains fields for:
 - *Start date: 01-Jan-2008
 - *End date: 31-Dec-2008
 - *Acquisitions status: Active
 - Acquisitions status date: 23-May-2008
 - Subscription open date:
 - Vendor: HBZ
 - Budgets:
- Subscription:** Contains fields for:
 - Acquisitions No.: 1211546111738_26
 - Purchase Order No.: UB2006-6691
 - Vendor subscription ID:
 - Material type: Electronic
 - Subscription type:
 - Subscription type note:
- Order:** A detailed order summary including:
 - System number: 3023891
 - PO number: UB2006-6691
 - Additional order number 1:
 - Additional order number 2:
 - Open Date: 24/10/2006
 - Order Status: Bestellung abgeschlossen
 - Status Date: 17/11/2006
 - Arrival Status: Complete
 - Invoice Status: Complete
 - Sub library: Universitätsbibliothek
 - Acquisition Method: Kauf
 - Order Date: 24/10/2006
 - Material type: Monographie
 - Library Note:
 - Vendor: GL
 - Vendor Reference:
 - Vendor Note:
 - Quantity: 1
 - Quantity Note:
 - Unit Price:
 - Total Price: 29.00
 - Currency: Euro
 - List Price: 29.00
 - Terms Sign: -
 - Terms Percent: 0.00
 - Final Price: 29.00
 - Local Price: 29.00
- Renewal/cancellation:** Includes 'Advance notification Period: 150 Days' and 'Auto renewal' options (No/Yes).

Red arrows point from the text annotations to specific elements in the interface: 'Overview' points to the top navigation bar; 'Inherent information or overwriting' points to the 'Acquisitions' section; 'Licence status...' points to the 'Status' fields; 'Vendor (selected list)' points to the 'Vendor: HBZ' field; and 'Ask Aleph button' points to the globe icon next to the 'Purchase Order No.' field.



The screenshot shows a web interface for managing e-products. The main content area is titled 'Description' and contains the following information:

*Type:	Supplemental
License name:	Einsingulärer tests
*License method:	Negotiated
*License start date:	01-Jan-2008
*License end date:	31-Dec-2008
Renewal date:	
*License execution date:	15-Oct-2008
Standard duration:	1 years
*Vendor advance notice:	150 days
*Renewal type:	Automatic
License URI:	
License URI type:	URI

On the right side, there is a 'License status' section with a dropdown menu set to 'Approved'. Below this, there are fields for 'Licensor' (GBI), 'Original licensor' (test), 'Licensee' (FU-Biologie), and 'Local licensing negotiator' (GBI).

Overwrite inherent information

License status

License period

Notification of renewal

License vendor

Status generate notification, no action possible

Loader functions for loading

- Objects, activating lists of titles, holding information

- Libraries

- Organizations

Task manager for executing routine tasks

Report functions

Very helpful log functions (summary and long versions)

Detailed system of rights according to the ERMI standard

- However, we have only three forms of accounts: read only, modify, and admin

Workflow concept (not in use at present)

- Start: August 2006 with Version 2.0, Patch no. 14; staff training by ExLibris and first steps
- Test and analyses do not come up to expectations or promises; numerous support incidents
- From July 2007: participation in the 'Implementation Partner Programme' with the goal of establishing the necessary basic functions
- With Service Pack December 2007 in our view the system is functional although there are still bugs and we have many additional requests
- Patches are provided every two months which eradicate errors as well as providing new functions and updates of the documentation
- As of December 2007 (parallel to the renewal processes 2007/2008) preparations and tests for start of production
- Status June 2008: Patch no. 528, CKB update 0806

- Support an parallel updating need to be in one hand, in our case by KOBV
- Any Verde project should begin early in the year to avoid conflicts with the renewal period end of the year (as of March); 3–6 months to introduce are a minimum, and time-consuming factors are:
 - Reorganization of transactions, changing the former ways of working
 - Training staff, establishing work procedures
 - Establishing the configuration of Verde, customization of SFX and Aleph, testing
 - In the consortial environment: necessary for the parties involved to agree upon conventions and procedural-organisational stipulations
- The advantages of managing licensing data with Verde are now being seen
 - Structured preparation of all licenses, improved documentation, fast retrieval of the requisite information when problems arise
- Clean up script with deficiencies – unexpected data from previous testing phases
- Outstanding problems:
 - Several active licenses in one package
 - Unsolved bugs
- Further problems associated with this project:
 - At the beginning Verde was not functional
 - Much more training as expect is necessary; lots of software changing during the implementation
 - Exchange of experiences and information with others was virtually impossible
 - The documentation was lousy

FUB:

STP: Titles data maintained in Verde instead of SFX; i.e., takeover of all data from SFX to VERDE. then VERDE data will 'feed' SFX (as of 9 June 2008)

Input of license data for local licenses (currently ongoing)

Deactivation of local consortial data and utilization of consortial licenses and lists of titles (dependent on FAK work)

Link-up with Aleph, test model until our Aleph system has been reorganized

Export to the German EZB-System in beta-testing

FAK office

Set-up of libraries and accounts, loading participants' data

Input of license data, approx. 50% is documented on the system

Activation of lists of titles (currently ongoing)

Testing and introduction of upload routines for license data, report functions and workflow

STP: All relevant data on licenses and participants are on the system and inputs/outputs are operative via uploads/reports — Autumn 2008?

- An ERM is urgently needed by all who are participating in the project
- In its current state Verde fulfills the basic requirements of a consortial ERM:
 - Systematic and ordered management of license data
 - Separation and integrative use of consortial data
 - Synchronisation with SFX as the end-user system
 - Link-up with the library system (Aleph) with limiting conditions
- Verde is complex and thus intensive training of staff is essential
- With Verde it is necessary to reorganize your workflow, particularly in a consortial environment
- There are still some outstanding problems, bugs, and lacking features
 - The data model is not adequate
 - With the reports modifications are necessary before they can be forwarded
 - Management of utilization data is not yet available
- Positive and fruitful cooperation with ExLibris in Hamburg, Germany, and Israel

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