Future of e-content management: a discussion forum on next-gen needs.

Phoenix IUG – Ahwatukee

May 8, 2019: 3:00 – 4:00

* Why are we talking about ERM
* ERM – a sneak peak of inspire ERM
* Discussion

Why ERM? eResource management is complicated. Content is no always available, not everyone is happy. III is looking for a new solution. IT is the majority of your budget.

* Electronic resource management is about making e-content available to patrons. We need to do better at managing. Looking to simplify the processes in place.
* DEMO of WATCH BOARD / Concept of the landing page for the ERM solution.
	+ Dashboard functions
	+ Data we monitor most frequently needs to be on our dashboard. You may want more than one dashboard. Drop-down next to Bette’s watch board can access other dashboards of the different roles.
	+ Configurable dashboard, critical alerts. When we talk about simplifying the process.
	+ Open Issues widget –Detecting a resource that has become unavailable – the open issue remains on our dashboard. Vendor does not respond. IT” -helps you keep track. “Title not available – system generated vendor request to vendor.
	+ This info can help you make decisions about vendors’ response time, etc.
	+ Task=based workflows – help you resolve what has been identified, help you keep track.
* Question – is this a new version of ERM? YES
* Q: what do you do about the URL checker? You can’t use the URL checker in an automated fashion with proxy links because you need a user and authentication.
* Q: How do you monitor the stuff without credentials? A: Link health monitoring how are we able to do that in an automated fashion - there are complexities. It adds to the configuration. Katheryn: There’s checking for a 404 error or checking for access verification. It’s tricky but the 404 is easy. The others are; do I land on a home page for the article? It’s an area where we have lots of questions. 404 errors should be checking but the landing pages- etc. Pay attention to Sci Direct
* Q: is there any thought about the system alerts – it would be nice to link out to the patron side so they can know the system is down. Is there something that’s going to be built? Answer: YES – III has been thinking a lot about the patron behavior in the event a title is not accessible. Come up with several things – have configurable patron facing messages for those diff conditions. What message do you want to be displayed? Do you want to have a patron feedback loop? Person from audience – or even better have that link auto send to an ILL form.
* Katheryn Harnish is also taking notes. She asks that folks state their names so she can reach out. Think about being a strategic cohort partnership. Running a subgroup that is an advisory board on ERM. We welcome your participation – we get better and do better as a result of your input.
* Q? Theta from Ohio link – I like the idea of the ERM system automatically directing it to someone. How can it be directed? Can this be configurable? Can you break this out by consortia v individual? A: How specific can we be with our messaging rules? That’s a really good question. We would be looking at these routing rules. Rose: - can you put in one email simple thing like – putting in folks emails. A: how can we make it as easy as possible
* Katheryn: the other thing I would mention, designing a notification service that is extensible and customizable is being worked on
* Q: is it all combined in Inspire – Margaret from Bergen county – will it be all included? A: Katheryn – so the answer is yes but we also know libraries are going to move and want to move different pieces of their ecosystem at different times. Thoughtful approach – let’s start with discovery but also build out the tools you need in parallel. Next step is the ERM because it adds value to discovery. As we move forward with ILS replacement – you can run in parallel but ultimately we envision you’ll get to a point you’ll need to move cataloging and acquisitions at the same time. Talking about patron engagement, analytics, bundling analytics into the solutions which is different than the industry thinks of analytics. We want to embed those tools and services driven by analytics into the applications themselves so your ERM mod will have reporting and stats. As we move forward – where is there value? Premium solutions for different libraries. Won’t need to buy as an add-on.
* Q: On the subject of analytics on the center of the screen, we have budget-related widgets. Any thoughts on visualizations, widgets etc. The center row in the DDA provider of the widget. Can drive a deeper dive into the budget and spending. Are there any similar widgets you would like to see?
* Q: At previous institutions, we had article tokens so checking the daily rate. How you get that data out when it’s not built to share would be a challenge. A: Yes, a lot of the stuff we see is going to be a challenge – data availability issues that continue to plague us.
* Any other thoughts what kind of data you want to see? Maureen C – journal usage within a database.
* Jumping over to a package summary page – this is where we would start to see the utilization within the specific packages. The overlap page is interesting, digging deeper than just the overlap. Going one level deeper – how many actually get used? Is this the fluff and filler that people are using? Journal usage within a database.
* Q: We would love to know how many people in a certain major are using these specific resources. Patron data utilization by patron type. Faculty, undergrad, if you know their major you can say how they are using. Katheryn – that’s one of the places where having a robust compelling discover service is important. The more we can do to bring together the discoverability of your content and support an integrated content on the back end.
* Q: Frank from APU – Could you articulate the difference between a discovery platform indexing and the indexing in inspire. Why would we want to move away from EDS to inspire. A: Katheryn – the first piece – we are working from a context basis to a relevancy basis. In order to build context and integrate the resources. We want to integrate them all together so when you have a user who comes to the library – we direct that user contextually. With the central index models, there are limitations so not all your collections (assets) are discoverable. That was a fundamental requirement to consider all of the things the library does. Another piece of the answer is full text relevancy is great but it doesn’t tell us the aboutness of the item. With the work we’re doing to bring semantic analysis of the full text, we’re able to provide very focused searching on a deep level on aboutness rather than a happenstance of a word. When you get 2 million hits back, that’s problematic. We’re going to enrich the metadata - that one of the fundamental
* We’re using a service that semantically analyzes the full text. Not just the index – it’s structured into three tiers. This is academic content. 6-8 meaningful aboutness concepts per page.
* Q: You’re using a service that’s already pulled some of this data? What if we have access to a database that hasn’t been ingested yet? A: Katheryn – that’s going to happen a lot, One of the things their investing in is a group that would help with provider relations to help us get access to the vendor metadata. Some are super willing – others not so much.
* Q: you can’t prevent someone from going to EBSCO and doing their search in which case they’re not taking advantage of the context engine. What would be your suggestion? A: Katheryn – I hope we will create an experience students will want to use – the broadest view of resources content– make sure they’re getting the best match. If they come through the context engine. If they come through us, there will have more.
* Q: Jessica - We used to have the EBSCO discovery layer but it was not working well. How we would like it to be on the home page so you could search by catalog or by discovery layer and an extra tab to get to all the extra resources. Could that work? A: Katheryn – it could. One of the things we are doing as we build the context engine and showcases, that object is referenceable you will be able to pick up that object and put it where you wanted / put it on your homepage. Popular books, referenceable externally and where you share those resources. An embeddable search box.
* Q: If there happened to be a certain title a patron is looking for – we want to be able to search other content in the discovery layer and for them to go straight to it from the discovery layer. Would this be able to solve that issue? A: Katheryn – Absolutely. We’re building a flow where you can load titles that get harvested into the context engine, for vendors that support it, they’re building API integration. Not all content providers support dynamic API support. Want to improve the staff experience for loading – the model of the context engine is that you can see the data in the context engine. You would not have to move things in and out. Based on what you have / do not have you can activate the titles you want to face to the user.
* Q: Denise from ASU – Katheryn mentioned the discovery rather than going directly into the databases. One of the things I tell them is not to even go into Encore. I want them to go into the database that have limiters. She wants limiters like in Cinahl but she can’t do that in Encore. They have encore with duet but she also feels like there is too much information for them in Encore – too broad a topic having something that is more specific for different subject areas. Limiters for subject areas. A: Katheryn – thank you for that feedback. A couple of things we could do to support deeper, richer searching. What is interesting is that further down the road – how do we know it’s a nursing major? How do I optimize the experience to deliver based on the user or the major. Customized by the type of user. When we have a database that’s structured on context but there’s another part of context and that’s user context which can be any variety of things Who I am, what am I studying, what type of device I’m on, the authorization. The user context is equally rich as intellectual context. Hopefully, as we do that – we’ll be able to focus the universe for the user.
* Follow up Q: does that mean you have people pre-authenticate? Katheryn – so yeah – from the library’s perspective the desire is to authenticate at the point of need (when you request) but that’s not how many of the web-based apps work today (cookies) We’ve talked about how do you provide incentive for the user to log in.
* Q: What if it was part of my account? Dashboard, etc. A lot of that information can be pulled in automatically. “Show me only” features. Next year we’re focused on user context. Something like that might be best as an opt-in.
* Privacy is a huge issue –we recognize libraries are on the diff place on the continuum. Some libraries don’t’ want to be responsible. Others are more liberal. Library –level and individual level. Making it required for login it –
* Katheryn – we do not want to block the ability to search. We will have anonymous searching.

Time – (extended)

Frank – the KB and the link resolver should be together. How are you using webbridge?

We’re looking at webbridge and how that migrates into the discovery platform. In the short term we leverage. Katheryn – it is part of our roadmap as part of the initial releases ERM / link resolution have to sit atop the same knowledgebase. How much can we achieve and how quickly? We think there are alternative solutions for short period.

Q: what’s the roadmap. Katheryn – the target expectation Late Q1 of next year. 2020. That could change if things become challenging.

Q: what about Open Athens – we know as part of the ecosystem you’ll need proxy and SSO – that support authentication a lot of the tools we’re looking at would allow us to do that. Take a care an partip