Meeting the E-Resources Challenge

An OCLC report
An OCLC report on effective management, access and delivery of electronic collections
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INTRODUCTION

BRIDGING THE GAP

By 2020, it’s predicted that 80 percent of academic library expenditures will be on e-resources.

Yet, alarmingly, 94% of librarians still rely on spreadsheets for ERM.

There is a disconnect between what librarians need and what the library technology market has been delivering.

The extent to which environmental forces have been reshaping the information landscape over the last few years can’t be overstated. Global connectivity, cloud computing, social networking, BYOD (Bring Your Own Device)—to name a few—are redefining what it means to be a teacher, a student, a scholar, a business person, a classroom, a library. And at the heart of this restructuring is the expanding amount of digital information—including the e-resources to which information seekers want, need and demand instant access.

Librarians have been evolving their methods and approaches to managing the increasing range and number of electronic collections. But much of the technology that has been developed to support this evolution is locally deployed, and involves multiple systems that each support only a single aspect of managing electronic resources.

The result is a complex and siloed set of hardware and software built on closed systems. In addition, the variations of data licensing and the limitations in system capabilities have forced librarians to develop a number of workarounds to manage their electronic resources that can be labor intensive and costly.

We know this. We have known it for a while. Yet a massive 94% of librarians still rely on nothing more sophisticated than spreadsheets to manage electronic collections, which in some cases represent 80% of their collections budget. The many surveys of librarians’ needs in relation to e-resource management create a compelling general case for change, but often fail to surface the detailed scenarios that are needed to inform the nature of that change.

In OCLC’s remit as a not-for-profit cooperative, much of our work is to generate insight, create impact and drive greater efficiencies for our members. We have worked with a number of librarians exploring the challenges that managing electronic resources presents, and are releasing this report not only as a means to extend these conversations across the community, but also as a means to help librarians find new ways to address these issues.

Three years ago, as part of our work in this area, OCLC convened the E-Resource Advisory Council, a group of library leaders from around the world, as a forum for more detailed explanation and discussion of specific challenges, and to guide OCLC’s support for e-resource management.
This report presents brief case studies of the experiences shared by the members of this group, and others, structured around key tasks in the e-resource management workflow: Select, Acquire, Describe, Discover, Access and Renew. The first part of this report illustrates the tasks that make up this workflow and gives examples of the typical challenges encountered (see graphic). Each case study then considers what an ideal future might look like, and reflects on some of the developments that might be required to bridge the gap. For example, while next-generation library systems like OCLC’s WorldShare Management Services (WMS) resolve many problems, not every library is in a position to make an immediate large-scale transition. With many seeking to move forward step by step, OCLC’s approach is to make the WorldShare applications for e-resource management individually available, so that libraries can progress at a pace their systems and budgets allow. Moreover, it is the goal of each WorldShare application to leverage the traditional and familiar management of physical materials by better integrating the management of electronic collections in the same interface and with the same management tools.

By offering applications that address acquisitions, link resolution, authentication, license management, discovery, metadata management and analytics packaged together as a complete solution—on an open, shared platform—our goal is to help libraries centralize the management and maximize the exposure of licensed resources in a simple end-to-end service. OCLC’s e-solution is informed by the community and consolidates key components designed to work seamlessly together. This provides one connected workflow to streamline and automate electronic collection management; putting electronic materials in the hands of your users more quickly, wherever they start their search.
# The E-Resource Management Workflow

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- Check costs & purchasing model
- Check licensing terms
- Check whether access is already available
- Evaluate functionality
- Open order on ILS
- Send order to supplier
- Start subscription
- Decrement budget
- Find or create catalog record
- Check and improve metadata
- Add to knowledge base
- Check discovery service
- Check for MARC
- Set up access

| Challenges | | |
|------------|---|
| Multiple systems and websites must be reviewed | Collections not always included in knowledge base; MARC records not always available; access systems not always fit for purpose |
| Checking licenses, systems and websites is a manual, repetitive process | Data must be checked and edited manually |
| Information must be duplicated in multiple systems | Data must be entered and checked manually |
Pursuing greater automation, integration and interoperability to support effective management and delivery of e-resources for users.

**DISCOVER**
- Update systems to include new resource
- Notify academic staff
- Integrate with other discovery channels

**ACCESS**
- Customize access configurations
- Synchronize and check data
- Deal with user problems
- Ensure access is maintained
- Keep on top of new functionality

**RENEW**
- Check renewal requests with faculty
- Review usage
- Check for transfers
- Select/deselect titles
- Advise agents
- Update knowledge base, electronic resource management and library management systems

**CHALLENGES**
- Low level of interoperability means multiple systems have to be updated individually
- System updates and staff notifications have to be manually actioned

- New system releases and features can break existing workflows and user journeys
- Diverse settings and devices make it time-consuming to replicate user experience

- Multiple systems must be checked and updated
- Data must be manually gathered from many sources and normalized
We recently experimented with Demand-Driven Acquisition (DDA) to see whether this will help us meet the varied needs of our staff and students while also, potentially, saving some time for library staff. With only a small budget available, we had to limit the faculty that participated in the program. This helped us in selecting from the wide range of content available from our provider. We built up a profile based on subjects, publishers, date ranges—and avoided duplicates where we already hold content elsewhere. We had to make several other initial decisions that we then fine-tuned, for example, decisions about the point at which browsing becomes a short-term loan, and how many loans are needed to trigger a purchase.

Although we wanted to offer unmediated DDA, the model was so popular with our patrons that we had to begin mediating requests. This was frustrating for users and made them feel guilty about incurring fees for the library—not our intention! The mediation was also time-consuming and led to awkward selection discussions with academics. It was not always clear that DDA resulted in the selection of the right content—a significant proportion of titles were not well used after purchase.

Another challenge was that we wanted to share metadata for DDA titles with union catalogs and other discovery channels to maximize the likelihood of our users finding these titles, but this raised the question of how to give access to our users without triggering ILL requests from others.
Meeting the Challenge

OCLC is working with leading publishers to ensure corresponding MARC records are delivered with the e-books that our members order through participating vendor partners. This means that once a library is registered in the WorldCat knowledge base, WorldShare Metadata Collection Manager automatically provides high quality MARC records, and maintains holdings, for the titles that a library has in its collection.

As selection processes like Demand-Driven Acquisitions become more popular, the WorldCat knowledge base can also expose DDA titles, allowing libraries to make e-books discoverable by users prior to purchase. Updated records are provided from WorldCat when a title moves from DDA to a purchased status. The system is completely flexible, and results in a more efficient workflow for collections staff, and faster access for users. In addition, this approach makes collections visible on the web by libraries’ holding symbols automatically attached to WorldCat records.

“Imagining the future

We’d like to be able to share metadata about our DDA titles with our national union catalog and with WorldCat, to enable it to appear in major discovery channels like Google Scholar, where we know many of our users will start their search.

Simone Kortekaas,
Project Manager, Innovation & Development, University of Utrecht
All libraries are having to shift to electronic materials as the only way to meet our users’ needs, and the effectiveness of our systems is increasingly about the quality of the data that describes the resources we’re trying to manage. From an acquisitions perspective, we’re not trying to manage bibliographic entities—we’re managing orders, packages and title lists, with multiple platforms, requirements and purchasing mechanisms. With so many variables, it’s inevitable that there are more layers of management.

These changes to our collections are changing the way we work. As our content becomes increasingly virtual, our staff need different skills. Our work is increasingly project-driven, data-driven—knowledge base-driven—and not all staff can adapt. We need systems that can automate a lot of this so that it is easy and intuitive for staff to complete new kinds of tasks.

We’re also finding that distinctions between departments are becoming blurred, for example, acquisitions and cataloging. Previously, our acquisitions department handled most of the knowledge base work—licensing and ordering—while a separate metadata cataloging unit was responsible for record management, load management and intersection with special and digital collections. But we’re moving from the print world, where processes and controls were very clear, to the e-resource world, where definitions break down because so many processes are cyclical. We’ve recently merged acquisitions and cataloging, as the lines between them are increasingly arbitrary.
Meeting the Challenge

At OCLC, we’re also having conversations about how e-resource workflows are blurring the boundaries of traditional workflow processes. This was part of the impetus for OCLC to combine core components of our strategy to manage e-collections into one solution.

WorldShare Acquisitions supports budgeting, ordering and receiving of both electronic and print resources and will automatically create WorldCat knowledge base holdings for newly acquired resources. At the same time, WorldShare License Manager captures license documents, manages central storage, and facilitates attachment to relevant collections along with all the associated license terms. Libraries might choose to take advantage of licenses loaded as templates to improve the efficiency of this process. Also, the centralized data for all contributed licenses can be made available in the form of an API for integration with external licensing workflows or with other discovery and delivery systems, such as course management software or ILL applications.

Moreover, the integrated Acquisitions module will alert libraries about to order physical titles when that same title is available electronically, streamlining conformance with evolving collection development policies in libraries. All of a library’s acquisitions functions are available in one environment. Librarians can search for a title, purchase it and process the order—all in one seamless workflow.

Imagining the future

Systems will evolve to be much more easily integrated, saving costs by automating workflows. We’ll transition away from locally developed ERM systems so that we can focus that development and maintenance resource on new challenges. We’re going to see organizational change, from restructuring our resources, to realigning the skills that we have.

Maria Collins,
Head of Acquisitions and Discovery, North Carolina State University
OVERTHINKING LIMITATIONS
Dawn Hale,
Head of Technical Services,
Johns Hopkins University

- Find or create catalog record
- Check and improve metadata
- Add to knowledge base
- Check discovery service
- Check for MARC
- Set up access

Not all vendors recognize the critical role of metadata for discovery and usage.

MARC records might be provided with the content, or we might need to search the publisher’s website, or email them. Our catalogers note what records are available, or when they will be ready if they are not yet available. Content providers aren’t always able to be clear about how many records are available, or when new ones will be added; sometimes we simply have to log in to the provider’s FTP site and count the number of records there and compare that to what we already have to see if anything new has been added.

This is a very labor-intensive process and the quality of records is often uneven. Certain fields are necessary to ensure that our search and discovery tools work properly. We have to undertake considerable checking and editing, keeping track of what edits we make to each content provider’s records so that we can quickly customize updates. Sometimes, records lack a unique ID so we can’t do simple overlay updates—we have to delete all the records in the ILS for that vendor, and load a whole new file. Even when we do get records, we often can’t share them, for example with union databases, which we use to maximize visibility of our content. That’s a real drawback.

Our preferred workflow is to get our MARC records from OCLC whenever possible. They send us email notifications when records are available, the records provided are of consistent quality, and we simply load the records—with little, if any, pre-load editing—into our ILS.
Meeting the Challenge

OCLC is using the collective influence of member libraries to dialog with publishers about the need for comprehensive, timely, good quality, reusable metadata that helps drive the discovery and usage that we all seek. OCLC’s WorldCat and the WorldCat knowledge base provide global metadata from multiple sources and keep the records continually updated. We’re working directly with content providers to increase the number of MARC records available, taking records at the point of origin and then enabling our members to enhance and expand data so that it is comprehensive and accurate enough to inform the many processes that depend on it—from discovery to access control to usage analysis. Every library using the system automatically benefits from the improvements to bibliographic data or access URLs made by others.

The data in the WorldCat knowledge base is what powers our solutions for electronic resources, supporting initiatives like DDA and ensuring access URLs for e-content are continually updated in a library’s discovery interface. The goal is to lower the barriers to reflect library holdings in the WorldCat knowledge base and to increasingly embrace a ‘hands-off’ model for maintenance of electronic collection holdings.

Imagining the future

We’re looking for a more robust system for managing our e-books, with timely updates from vendors about content changes, automatic alerts and dynamic pushing of new and updated MARC records. We also want vendors to minimize restrictions for sharing metadata so that we can share our records to maximize interoperability and discoverability. As we move toward a greater proportion of our content being acquired by Demand-Driven Acquisition, greater discoverability is as good for the vendors as it is for us and our patrons.

Dawn Hale,
Head of Technical Services, Johns Hopkins University
The implementation of a discovery service ‘front end’ to our physical, digital and remotely-licensed collections has created a more streamlined and intuitive ‘single search’ experience for our users, and has enabled us to retire our library catalog as a user interface. We’ve also integrated authentication across discovery services and content—Shibboleth and EZproxy authentication have been integral to this.

Despite presenting a single front end to our collections, we still spend a lot of time keeping up to date our various data sources and repositories, such as the library catalog, link resolver and institutional repository. Whether purchased recurrently or as a one-off, content is managed by several teams, and ownership of the ‘activation’ and ‘integration’ activities in discovery services can be disparate. Comprehensiveness, currency and accuracy of journal and e-book holdings information from content providers is still an issue when managing access to content, and requires considerable staff effort.

There are also continued challenges around moving away from reliance on a print ‘ownership’ culture towards widespread adoption of e-resources and an ‘access’ culture. Some providers are not yet able to support this shift—for example, those that don’t offer site-wide licensing, don’t provide metadata to library technology suppliers, or don’t do so at the same time as the materials are available.
Meeting the Challenge

To meet the challenge of ensuring discovery of the broadest range of materials a library owns or has access to, metadata must work to its full potential. Contribution to the world’s largest network of library data opens up collections to a wealth of new opportunities, giving users multiple ways to find collections wherever they work and explore.

Those users that start in the library can do so through OCLC’s discovery services, which provide a simple, consolidated view. But we know that this is only one among many ways that users choose to navigate and explore information. OCLC not only aggregates information from libraries all over the world; we also partner with Google and other important consumer sites, to surface collection information in the places where the majority of users start searching.

We have also opened up discovery to many more material types. OCLC is ‘content neutral’ in its approach to what a user might be looking for. We recognize that quick, one-click access is an expectation of most users, so we index over 977 million licensed e-articles. To supplement this, we have also indexed more than 37 million Open Access items and over 30 million pieces of evaluative content, all of which are combined and presented back to the user in a way that enriches their search experience.

Imagining the future

I’m hopeful that providers will be better able to support the realities of e-resource management and the impact of access restrictions on usage. I’d like to see an end to concurrent seats, and to multiple purchases of single copies, with site-wide licensing becoming the norm. I want all providers, particularly e-book platforms, to understand the importance of sharing metadata—promptly—so that we can maximize discovery of content through our intermediary services. It would also be helpful if standards could be more widely adopted; for example, to ensure that we can make like-for-like comparisons of chapter-level usage of e-books.

Sarah Price,
Assistant Director: Collection Management & Development, University of Birmingham
FOCUSING ON THE FUNDAMENTALS
Gregg Silvis,
Associate University Librarian for Information Technology &
Digital Initiatives, University of Delaware Library

Data synchronization is fundamental to e-resource access. It needs to start early on in the ordering process, when the terms of the deal are often not well translated, creating problems downstream. Things are further complicated by titles being swapped in and out of deals each year, with records not always being fully updated to align with these changes.

This means that content providers don't always know what we should have access to, and therefore they give incorrect information to the vendors of systems that should be enabling that access. Content providers also sometimes change the URLs for content without informing us, so we only find out when users encounter access problems.

Aggregators’ systems are also based on turning on and off ‘standard’ packages, but with institutions able to customize, packages are only about 95% standard. So sometimes the problem is that the data being synchronized isn’t correct to start with.

E-books introduce new challenges. Some platforms don’t allow us to set different loan periods for different types of patrons, which could end up having a substantial impact on access.
Meeting the Challenge

This is a complex area. WorldShare License Manager brings together OpenURL link resolution and the collection information in the WorldCat knowledge base with vendor, licensing and subscription management in one solution. This helps library staff more effectively manage license agreements, rights, access and resolution to full text from the same interface, eliminating the need to devise workarounds to connect disparate systems.

License Manager provides ‘license templates’ for global management of public and shared licensing terms by staff at all participating libraries. These templates are globally maintained along with a shared Vendor Information Center, empowering libraries to collectively maintain any information on providers of e-resources worldwide.

WorldShare License Manager is a vendor-neutral service that allows for KBART-formatted exports of WorldCat knowledge base collections for integration with other library management systems.

Imagining the future

We need more sustainable processes for customizing and synchronizing data sets. That level of access to current content is something we are used to in e-journals but will be new for e-books.

Gregg Silvis, Associate University Librarian for Information Technology & Digital Initiatives, University of Delaware Library
ENHANCING USER SATISFACTION
Paul Mellinger,
Electronic Information Officer,
University of the Arts London

Users expect any time, anywhere access.

My institution spends an ever-increasing proportion of its library budget on e-resources and has invested heavily in discovery tools that optimize access to these materials. Our users (students and faculty) expect access to online content at any time of the day or night, from on or off campus. So when content goes offline for whatever reason, it is critical that my team responds and troubleshoots the problem swiftly, ensuring that we maintain satisfaction with the service.

Multiple parties must collaborate to investigate and fix problems.

The problem is that troubleshooting is time-consuming, and often requires consultation with multiple parties before the actual cause of the fault can be isolated. Problems are logged online and are followed up by Academic Liaison Librarians and the Electronic Information Team to understand whether the issue is user-related. Device incompatibility is sometimes the reason content cannot be accessed, as publishers can place restrictions on the types of devices that can be used to access e-books, for example.

If the problem is not with the user, then we need to look at every point in the chain. The discovery tool, database or e-journal, link resolver, proxy server, authentication system, IT network—all will need to be tested and retested. Communication between the Electronic Information Team and IT services can sometimes be ongoing until the problem is finally pinpointed. Fixing the fault can take hours but it can also take longer depending on the problem.
Meeting the Challenge

Online access to resources has a direct impact on the user’s experience of the library. In areas like troubleshooting, reaction times are important. Providing services that address multiple points in the ‘chain’ can help to efficiently address problems.

Our access and authentication solution, EZproxy, helps simplify the challenge of providing and troubleshooting on- and off-campus access to multiple resources. OCLC has recently made EZproxy available as a hosted service as well as the previously deployed model. This means libraries with stretched IT resources can have us set up, monitor, back up and—perhaps most challenging, in this day and age—keep up to date with security on their behalf.

Today, libraries can use the WorldCat knowledge base configuration to seed their EZproxy configuration file, further breaking down the silos of metadata management and access. In the future, libraries will be able to cooperatively manage EZproxy access stanzas, scaling the shared activity of managing a quickly shifting environment of remote access management.

Imagining the future

I would like to see us in a place where less time is spent on troubleshooting and fixing faults, and more time spent on enhancing our users’ experience.

Paul Mellinger,
Electronic Information Officer, University of the Arts London
Evidence-based collection development and management has never been more crucial, as the growth in scholarly resources continues to outstrip institutional budgets, and libraries come under increasing pressure to demonstrate their value and impact to diverse stakeholders. The move to digital, effectively complete for journals and rapidly accelerating for monographs, has supplied libraries with new collection data via standards such as COUNTER, which now form part of a library’s business-as-usual evidence base. However, it has proven costly to collect and collate e-resource usage, and limitations inherent in current standards allow only crude attempts at meaningful cost–benefit analysis.
Meeting the Challenge

OCLC is building on our experience providing COUNTER-compliant statistics for OCLC’s discovery solution, via our own SUSHI server, to support deeper analysis via third-party e-resource usage statistics. Our future analytics service will aggregate COUNTER-compliant statistics from multiple sources, including third-party content providers.

When a library makes the difficult decision to cancel titles or packages, we can help automate some of the related processes, for example by automatically removing holdings in WorldCat, or outputting a delete MARC record. License Manager will provide quick answers to questions about cost-per-use and archival access, and will update the knowledge base and WorldCat accordingly.

Ultimately, statistics support both libraries’ collection development decisions, and libraries themselves—providing quantifiable evidence about the reach and use of electronic materials by stakeholders.

Imagining the future

Data will become more sophisticated and joined up, to provide evidence that can work harder, travel further, and routinely feed corporate datasets and management dashboards—thereby placing the library more prominently into the organization’s strategic environment. Usage data will be refined to the article and chapter-levels, with greater clarity on what usage relates to what cost. Library datasets will be extended to encompass a wider selection of collection usage and activity, including link resolver click-throughs, authentication logs, and patron-driven transactions, thereby augmenting other library data and, in so doing, enabling the development of a new generation of services and analytics.

Shared services will provide the power to combine, normalize, and benchmark data across formats, business models and delivery platforms at national and global scales. Existing initiatives like JUSP (the JISC Journals Usage Statistics Portal, which takes advantage of the SUSHI protocol to automate data harvesting), and IRUS-UK (Institutional Repository Usage Statistics, which delivers COUNTER reports for repository usage), are already demonstrating what is possible with this approach.

As part of the library evidence base, usage data will find real-world application beyond local collection development and management, and an increasingly big data approach will pull upon this data to contribute to learning analytics, research metrics, and the creation of new knowledge.

Nick Woolley, Head of Academic Library Services, Northumbria University
WORKING WITH YOU TO MANAGE E-RESOURCES

Pursuing integration
E-resource management continues to create new challenges with which early technologies have struggled to keep up. As boundaries and responsibilities shift, the trend is toward closer integration of many previously separate functions and processes. There is a preference for more centralized management of data, both within institutions and beyond, as evidenced by shared services such as GOKb, KB+, WorldCat and the WorldCat knowledge base.

Blending our experience with yours
In this context, OCLC's goal is to bring to bear our many years' experience of integrating people, data and workflows. Taking advantage of our unique status as a worldwide, library-governed cooperative, we're continually exploring your fundamental challenges to ensure that our services are adapting in line with your changing needs. From analyzing the many studies of e-resource management to developing use cases, to talking with our individual members and our E-Resource Advisory Council, our research has informed a new suite of e-services, which we believe can help libraries make the transition to more streamlined, better automated management of their electronic collections.

Synchronizing from a quality source
OCLC has long pursued a 'single source' strategy, with a master system of bibliographic metadata from which updates are synchronized to other services to ensure that records and links stay consistent and up to date. As you select and acquire content, we're helping you make a basic, but accurate, record available to expedite discovery by your patrons. Then we enhance the record's description over time, with automatic enrichment as its WorldCat master is improved by our members, partners and staff.

Interfacing with your ecosystem
We believe in open integration with other systems and workflows to help streamline your processes—whether it's bringing all your print and electronic content together into one system to simplify acquisition and renewal, or interfacing intelligently with patron-driven acquisition providers.

Harnessing the cooperative
This unique community-led approach to records management has resulted in widespread acknowledgement of the richness and accuracy of libraries' metadata. We're now transitioning those processes, and the quality they drive, to the description, management and discovery of electronic resources. We're also working with more providers of e-resources to set up direct feeds of collection and holdings data, to help you ensure maximum access to licensed resources at users' point of need.
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<td>Manage holdings and obtain or update records for vendor collections via WorldShare Metadata Collection Manager</td>
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<td>Integrate continually enhanced MARC records from WorldShare Metadata Collection Manager into knowledge base and discovery interfaces</td>
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<td>Eliminate workarounds by consolidating link resolution and collection information with vendor, license and subscription information in WorldShare License Manager</td>
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<td>Ensure access is maintained with continually updated metadata from WorldShare Metadata Collection Manager</td>
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<td>Keep on top of new functionality with EZproxy</td>
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<td>Inform renewal decisions by reviewing usage in WorldShare License Manager’s future analytics service</td>
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<td>Rely on WorldShare Acquisitions to update relevant systems</td>
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http://www.oclc.org/services/electronic-collection.en.html
Inviting your views

We would like to record our thanks to the members of our E-Resource Advisory Council whose input has helped shape the e-resource management capabilities that we are bringing you today. But the journey doesn’t stop here; we look forward to continuing this conversation with you. In our unique capacity as a library cooperative, we want to provide an ever-stronger platform for librarians’ voices to be heard.

It’s easy for you to take the first step—just pick up the phone and call your regional OCLC office.

Alternatively take a minute to tell us how else we can provide support.

Share your thoughts in our quick online poll at:

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