Resolving our hosting dilemmas:
comparing remotely and locally hosted OpenURL link resolvers

with

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Abstract

OpenURL link resolvers are currently available as remotely or locally hosted systems. We will discuss and compare both options recently implemented at our respective institutions.

Remote hosting at the University of Kansas (KU): Article Linker

Local hosting at Kansas State University (K-State): SFX
Outline

- Background information
- Link resolver selection criteria
- Remote hosting @ KU 🦅
- Local hosting @ K-State 🐏
- Points of comparison
- Time for questions
Background:
Where are we?
Background:

About your presenters

Judith (University of Kansas)

- E-resources/technical services librarian
- 60% technical services
  - Manage public record for e-resources
  - Liaison with vendor, SerialsSolutions.
  - Manage link resolver tasks
  - Troubleshoot access problems
- 40% science bibliographer
  - Collection development
  - Instruction
Background:

About KU Libraries

Trivia:
- 8 libraries, 2 campuses
- 155 library employees
- 26,700 FTE
- 28,700 unique e-serials in knowledge base

Link resolver history:
- LinkFinderPlus implemented early 2003
- Committee charged with review of link resolver options early 2006
- Transition to Article Linker began in May
Background:
About your presenters

Jamene (Kansas State University)
- Resource Linking Librarian
- New position, new duties
- Link resolver maintenance
  - Vendor liaison, 1st line troubleshooting
- Proxy server configuration
- MARC records for E-journals
  - Service included with link resolver
Background:

About K-State Libraries

Trivia:
- 6 libraries, 2 campuses
- 19,500 FTE students
- 135 FTE library employees
- 8,000 periodical subscriptions
- 22,500 unique e-serials accessible

Link resolver history:
- LinkFinderPlus/ENCompass development site
- Transition before products’ demise
- Shopped in Fall 2005
- Sent RFP in Spring 2006
- Implemented SFX in Summer 2006
At a Glance:
Link Resolver Selection Criteria

- Standards compliance
  - OpenURL 1.0, SAP2
- Extended services
  - Integrate w/ ILL software, public catalog
- Components
  - Citation service, A-Z list, user group
- Knowledgebase
  - Relevant to library
- Vendor
  - Existing relationship, hosting options
Remote Hosting:

Description

Vendor:

- Houses and maintains the server and software
- Provides the technical expertise
Remote Hosting: Vendors

Currently:
- 1Cate (OCLC)
- Article Linker (SerialsSolutions)
- Discovery: Resolver (Endeavor/Ex Libris)
- Gold Rush (Colorado Alliance)
- LinkSolver (OVID)
- LinkSource (EBSCO)
- Resource Linker (Ulrich’s/CSA)
- SFX ASP (Ex Libris)
- SirsiDynix Resolver (SirsiDynix)
- SwetsWise Linker (Swets)
- VLink (Info/Extensity/GEAC)
Remote Hosting @ KU: Selection

- Library Committee charged to review options for new service
- Criteria provided to committee:
  - Easily manageable with minimal support from IT staff for ongoing configuration
  - Extensive and continuously updated knowledgebase aligned with KU’s holdings
  - Compatible with KU’s providers that support OpenURL.
  - Incorporates local services such as ILL, searching online catalog
Remote Hosting @ KU: Selection

- Additional criteria generated by the committee:
  - Integrates with an e-journal management service
  - Has a substantial customer base including large academic institutions
  - Has a track record of responsive customer service
  - Demonstrates a commitment to ongoing development
Remote Hosting @ KU: 

Selection

- Article Linker selected:
  - Current library staff could support link resolver
  - Customer of SerialsSolutions
  - Knowledgebase already in place
Remote Hosting @ KU: Implementation

• Reading & completing SerialsSolutions documentation:
  • Customization forms
  • Target setup guide
  • Referring source setup guide
  • Advanced features
Steinberger J, Kelly AS
Cardiovascular risk at the extremes of body composition
JOURNAL OF PEDIATRICS 149 (6): 739-740 DEC 2006
Times Cited: 0

Article Title: Cardiovascular risk at the extremes of body composition
Author: STEINBERGER, J
Journal: The Journal of Pediatrics
ISSN: 0022-3476
Volume: 149
Issue: 6
Starting page number: 739
DOI: 10.1016/j.jpeds.2006.10.050

If full-text is not available above,
Search the KU library catalog by ISSN/ISBN (preferred)
Search the KU library catalog by journal/book title
Request a loan or copy of this item (if not available at KU)
Ask a Librarian for help

Report a link failure
Get permanent link for this page
Remote Hosting @ KU: Implementation

- Testing of custom links
- Set up a “prep” program temporarily to forward the OpenURLs to production URL
- Contacted database vendors with new URL and KU Link icon
- Tested all sites once production URL operational.
Remote Hosting @ KU: Implementation

- Tested
- Tested
- Tested
Remote Hosting @ KU: Regular Maintenance

SerialsSolutions:

- Provides periodic updates
  - Customization options
  - Linking modifications
- Results displays
Remote Hosting @ KU: Regular Maintenance

- Library staff:
  - Maintain knowledgebase thru vendor client center
  - Evaluate customization options
  - Monitor linking problems
    - Urge source vendors to modify parsing of data
  - Continue to test
  - Inform public service staff of updates
Remote Hosting @ KU: Evaluation

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
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<tbody>
<tr>
<td>• Vendor maintains server &amp; software</td>
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<tr>
<td>• Implementation quick</td>
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<tr>
<td>• No major updates</td>
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<td>• IT staff nominally required for routine maintenance</td>
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<td>• Financial cost low</td>
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<td>• Could easily switch to another service</td>
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<tr>
<td>• Loss of control</td>
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<tr>
<td>• Depend on vendor’s staff for problem solving</td>
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<tr>
<td>• Future development in vendor’s corner</td>
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Local Hosting:

Definition

Customer buys, owns, maintains
- Server hardware
- Resolver software

Customer pays maintenance fees
- Knowledgebase updates
- Software patches, upgrades
Local Hosting:

Vendors

Confirmed as of December 2006:
- SFX - Ex Libris
- GODOT/CUFTS – Simon Fraser University Library (open-source)
- WebBridge – Innovative Interfaces, Inc. (no remote host option)
- OL2 - Fretwell-Downing Informatics (add-on to ZPortal only)

Unconfirmed since February 2006:
- VLink – Info/Extensity/Geac Library Solutions
- SirsiDynix Resolver – SirsiDynix

Local host option withdrawn since February 2006:
- TOUResolver – TDNet
- 1Cate – OCLC Openly Informatics
Local Hosting @ K-State: 
Selection

Request For Proposal (RFP) requirements:

• Local hosting on Solaris platform
• OpenURL compliance
• A-Z list service
• Vendor-maintained knowledgebase
• MARC record service
• ILL software (Illiad) integration
Local Hosting @ K-State: Selection

- Fallout from LinkFinderPlus required local access & control:
  - data
  - metadata
  - scripts
- New resolver to be essential centerpiece of future projects:
  - Online catalog
  - ILL software (Illiad)
  - COinS (ContextObject In Span)
    http://ocoins.info/
  - LibX Firefox extension
    http://www.libx.org
Local Hosting @ K-State: LibX Firefox extension

1. LibX ready to search, using data from Amazon.com

2. K-State branding appears at some searchable content

3. LibX creates links out of ISBN/ISSN numbers
Local Hosting @ K-State: Selection

Response from vendors:
- SFX (Ex Libris)
- Article Linker (SerialsSolutions)

Purchased SFX with student government grant:
- Software
- Installation & training
- 1 year of service
Local Hosting @ K-State: Implementation

Installation

• Populate local knowledgebase
• Activate targets
  • Communicate w/ staff via blog
  • http://ksulib.typepad.com/did/2006/08/sfx_interfaces_.html
• Add SFX button to Databases Web page
  • http://www.lib.ksu.edu/db/
• Customize public interfaces
• Test, test, test
Local Hosting @ K-State: Implementation

Three critical post-activation screens
Local Hosting @ K-State: Regular Maintenance

- Monthly updates
- Backups
- Statistics & reports
- Troubleshoot
- Report errors
- Communicate with campus computing services
### Local Hosting @ K-State: Evaluation

<table>
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<tr>
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<th>Disadvantages</th>
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</thead>
<tbody>
<tr>
<td>• control</td>
<td>• staff-dependent</td>
</tr>
<tr>
<td>• ownership</td>
<td>• problem-solving</td>
</tr>
<tr>
<td>• positioned for future projects</td>
<td>• permanence</td>
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<td>• priority</td>
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Points of Comparison: Pricing Models

- Subscription-based
  - Remote hosting is typical
  - Lower annual fees include updates
  - Rates may increase annually, just like journals

- Purchase
  - Local hosting is typical
  - Higher initial price
  - Annual maintenance fees keep KB updated
Points of Comparison: Relative Cost

Link Resolver Cost Comparison

For estimation purposes only
Costs do not include hardware or staff
Points of Comparison: Remote vs. Local Hosting

The Balancing Act:

- Vendor-dependent? Or Staff-dependent?

- Flexible or permanent?

- Freedom or control?
Time for Questions

- Contact Judith: 785.864.4931 jemde@ku.edu

- Contact Jamene: 785.532.6732 jamenebk@ksu.edu

Thank you for attending!


