

# Resolving our hosting dilemmas:

comparing remotely and locally hosted OpenURL link resolvers

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with



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# Abstract

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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): 

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

# Outline

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- Background information
- Link resolver selection criteria
- Remote hosting @ KU 
- Local hosting @ K-State 
- Points of comparison
- Time for questions

# Background: Where are we?

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Background:

## About your presenters

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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

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### 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

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Jamene (Kansas State University)

- Resource Linking Librarian
- New position, new duties
- Link resolver maintenance
  - Vendor liaison, 1<sup>st</sup> line troubleshooting
- Proxy server configuration
- MARC records for E-journals
  - Service included with link resolver



Background:

## About K-State Libraries

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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

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- 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

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### Vendor:

- Houses and maintains the server and software
- Provides the technical expertise

# Remote Hosting:

## Vendors

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### 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

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- 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

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- 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

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- Article Linker selected:
  - Current library staff could support link resolver
  - Customer of SerialsSolutions
  - Knowledgebase already in place



# Remote Hosting @ KU:

## Implementation

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- Reading & completing SerialsSolutions documentation:
  - Customization forms
  - Target setup guide
  - Referring source setup guide
  - Advanced features



# Web of Science Citation:

Steinberger J, Kelly AS  
[Cardiovascular risk at the extremes of body composition](#)  
JOURNAL OF PEDIATRICS 149 (6): 739-740 DEC 2006

Times Cited: 0



## KULink

[Databases](#) | [E-Journals](#) | [KU Libraries Home](#)

[Edit Citation](#)

**Article Title:** Cardiovascular risk at the extremes of body composition

**Author:** STEINBERGER, J

**Journal:** The Journal of pediatrics

**ISSN:** 0022-3476

**Date:** 2006

**Volume:** 149

**Issue:** 6 **Starting page number:** 739

**DOI:** 10.1016/j.jpeds.2006.10.050

### Content should be available via the following links

Coverage Range	Links to content	Resource
1999 - present	<a href="#">Article</a> <a href="#">Journal</a>	ScienceDirect Journals
CrossRef offers the following full-text links:	<a href="#">Article</a>	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

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- 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

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- Tested
- Tested
- Tested





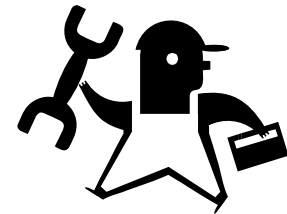
# Remote Hosting @ KU:

## Regular Maintenance

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### SerialsSolutions:

- Provides periodic updates
  - Customization options
  - Linking modifications
  - Results displays





# Remote Hosting @ KU:

## Regular Maintenance

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- 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

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- Advantages

- Vendor maintains server & software
- Implementation quick
- No major updates
- IT staff nominally required for routine maintenance
- Financial cost low
- Could easily switch to another service

- Disadvantages

- Loss of control
- Depend on vendor's staff for problem solving
- Future development in vendor's corner



## Local Hosting: **Definition**

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Customer buys, owns, maintains

- Server hardware
- Resolver software

Customer pays maintenance fees

- Knowledgebase updates
- Software patches, upgrades

# Local Hosting: Vendors

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## **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

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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

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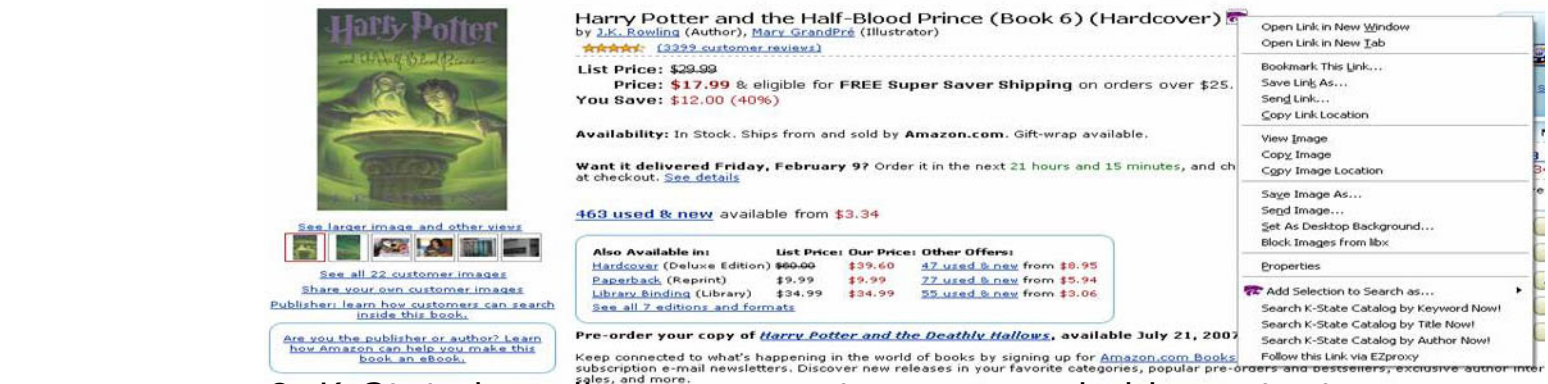
- Fallout from LinkFinderPlus required local access & control:
  - data
  - metadata
  - scripts
- New resolver to be essential centerpiece of future projects:
  - Online catalog
  - ILL software (Illiad)
  - COinS (ContextObject In Span)  
<http://ocoins.info/>
  - LibX Firefox extension  
<http://www.libx.org>



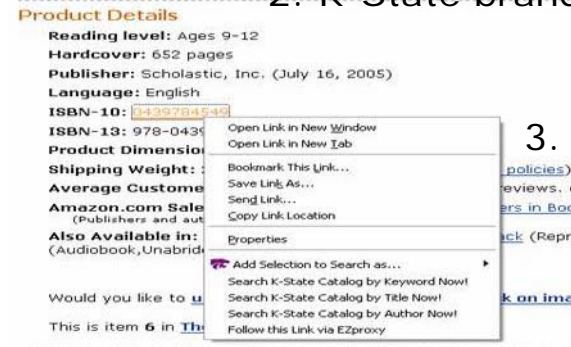
# Local Hosting @ K-State: LibX Firefox extension



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

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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

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## Installation

- Populate local knowledgebase
- Activate targets
  - Communicate w/ staff via blog
  - [http://ksulib.typepad.com/did/2006/08/sfx\\_interfaces.html](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

**SFX ADMIN CENTER**  
SFX instance: sfxst3

[KBManager](#) | [KBTools](#) | [Troubleshooting](#) | [Administrator Tools](#) | [Statistics](#) | [Other](#) | [Searchable A-Z](#) | [KBUpdate Reports](#)

Glossary of icons in the Access column:  - Full Access |  R - Read Only |  X - No Access

KBManager	
Access	Tool Name
<input checked="" type="checkbox"/>	<a href="#">Sources</a>
<input checked="" type="checkbox"/>	<a href="#">Targets</a>
<input checked="" type="checkbox"/>	<a href="#">Search Objects</a>
<input checked="" type="checkbox"/>	<a href="#">User Parameters</a>
<input checked="" type="checkbox"/>	<a href="#">Institutes</a>

KBTools	
Access	Tool Name
<input checked="" type="checkbox"/>	<a href="#">DataLoader</a>
<input checked="" type="checkbox"/>	<a href="#">Look-Up Tool</a>
<input checked="" type="checkbox"/>	<a href="#">Export Tool</a>
<input checked="" type="checkbox"/>	<a href="#">MARCIt! Tool</a>
<input checked="" type="checkbox"/>	<a href="#">TargetMatcher</a>
<input checked="" type="checkbox"/>	<a href="#">Threshold</a>
<input checked="" type="checkbox"/>	<a href="#">Category</a>
<input checked="" type="checkbox"/>	<a href="#">Collection</a>

Troubleshooting	
Access	Tool Name
<input checked="" type="checkbox"/>	<a href="#">OpenURL Generator</a>
<input checked="" type="checkbox"/>	<a href="#">Debugging</a>
<input checked="" type="checkbox"/>	<a href="#">SFX Help Form</a>
<input checked="" type="checkbox"/>	<a href="#">KB changes via CRM</a>

Administrator Tools	
Access	Tool Name
<input checked="" type="checkbox"/>	<a href="#">SFXAdmin Users</a>
<input checked="" type="checkbox"/>	<a href="#">UNIX File Manager</a>
<input checked="" type="checkbox"/>	<a href="#">Menu Configuration</a>
<input checked="" type="checkbox"/>	<a href="#">SFX eXpress Administration</a>

KBUpdate	
Access	Tool Name
<input checked="" type="checkbox"/>	<a href="#">TEXT Rep</a>
<input checked="" type="checkbox"/>	<a href="#">HTML Rep</a>

Statistics	
Access	Tool Name
<input checked="" type="checkbox"/>	<a href="#">SFX Quer</a>
<input checked="" type="checkbox"/>	<a href="#">Scheduler</a>

## Get it @ K-State

**Title:** Measuring Patient Quality of Life: Is the Health Utility Index Useful?  
**Source:** Psychiatric quarterly [0033-2720] yr:2007 vol:78 iss:1 pg:53

### Your options

#### Online

Get an online copy from **Springer Standard Collection**

Year:  Volume:  Issue:  Start Page:

#### Print

Check for a print copy in the **K-State Libraries Catalog**

### Other helpful services

## K-State Libraries

quick links: [CATnet Home](#) | [Catalog](#) | [Databases](#) | [E-journals](#) | [Login to My Account](#) | [Help](#) | [Site Index](#)

### Find a Database

By name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [start over](#)

By subject:

Already have a citation? Use [Citation Linker](#) to locate a copy.

For additional resources, try the [subject guides](#). Or, [ask a librarian!](#)

Not sure where to start? Try searching these general databases:

#### Expanded Academic ASAP journal list powered by GETIT

This is a good starting place for finding journal articles on almost any topic. Full-text and/or scanned pdfs are included for many of the articles it indexes. Searches can be easily limited to articles from peer-reviewed (aka scholarly, academic, refereed, or professional) publications. The Subject Guide Search is especially useful for browsing subdivisions of a topic. Note: Expanded Academic ASAP is a subset of InfoTrac OneFile.

Coverage: 1980- Access: unlimited Licensed by: BCR

#### ProQuest Research Library title list powered by GETIT

This is a good starting point for finding journal articles on almost any topic. Over 150 academic subject areas are covered, and many articles are full-text. Searches can be limited to scholarly, peer-reviewed journals. Use the "Topics" button to browse topics or get suggestions on keywords to use.

Coverage: 1971- Access: unlimited Licensed by: KSL

# Three critical post-activation screens



# Local Hosting @ K-State:

## Regular Maintenance

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- Monthly updates
- Backups
- Statistics & reports
- Troubleshoot
- Report errors
- Communicate with campus computing services





# Local Hosting @ K-State:

## Evaluation

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### Advantages

- control
- ownership
- positioned for future projects
- priority

### Disadvantages

- staff-dependent
- problem-solving
- permanence

# Points of Comparison: Pricing Models

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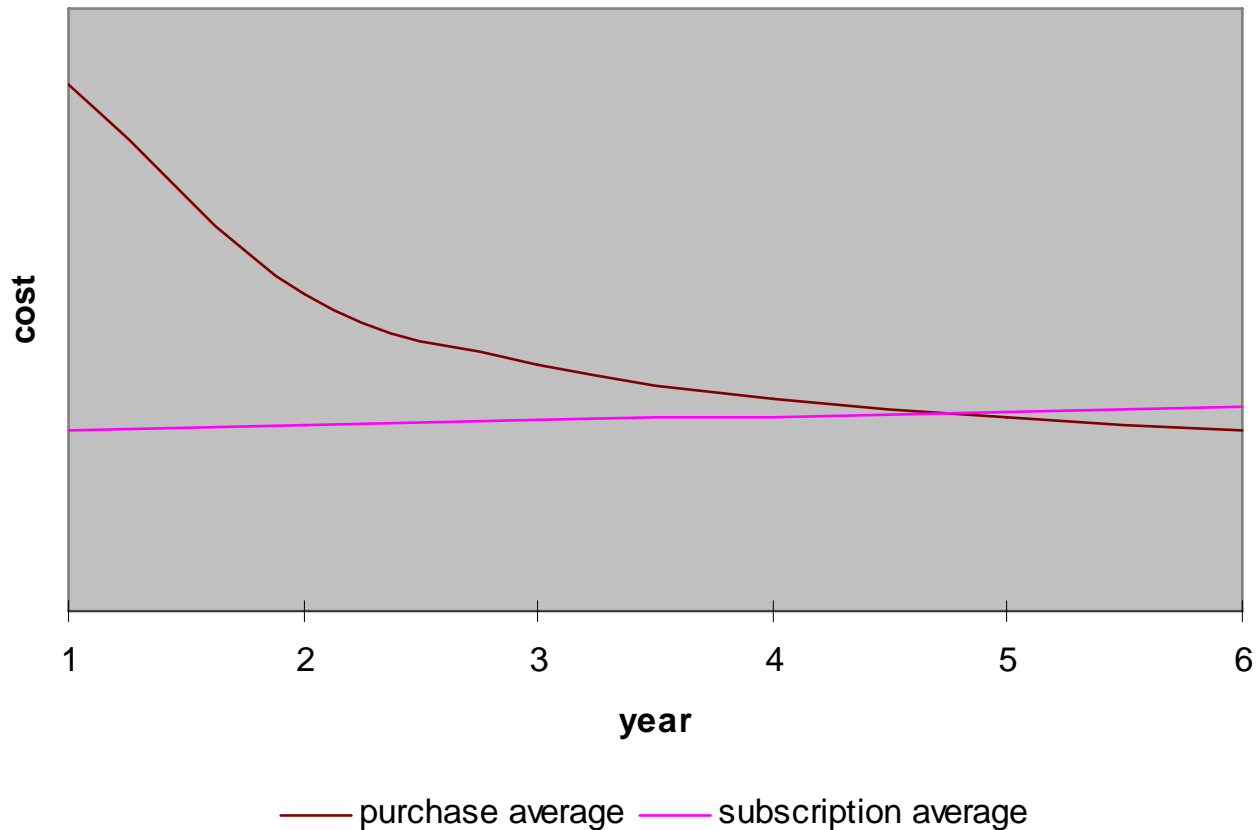
- Subscription-based
  - Remote hosting is typical
  - Lower annual fees include updates
  - Rates may increase annually, just like journals
- Purchase
  - Local hosting is typical
  - Higher initial price
  - Annual maintenance fees keep KB updated



# 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**

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## **The Balancing Act:**

- Vendor-dependent?  
Or Staff-dependent?
- Flexible or permanent?
- Freedom or control?





# Time for Questions

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- Contact Judith:  
785.864.4931  
[jemde@ku.edu](mailto:jemde@ku.edu)
- Contact Jamene:  
785.532.6732  
[jamenebk@ksu.edu](mailto:jamenebk@ksu.edu)

**Thank you for attending!**

# Works Cited

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