



**Approved by the NISO Business Information Topic
Committee for Ballot to NISO Voting Members
Ballot Dates: May 1, 2008 – May 30, 2008
If approved, this proposal will result in the formation
of a new NISO Working Group.**

Cost of Resource Exchange (CORE) A Proposed NISO Work Item

The following proposed work item is respectfully submitted on behalf of Ed Riding (SirsiDynix), Ted Koppel (Auto-Graphics) and Jeff Aipperspach (Serials Solutions).

Work Item Title:

The proposed name of the work is "Cost of Resource Exchange" (CORE), and is intended as a standard to facilitate the exchange of cost, fund, vendor, and invoice information between Integrated Library Systems (ILS) and Electronic Resource Management Systems (ERMS).

Background and Problem Statement:

The purpose of this specification is to facilitate the transfer of cost and related financial and vendor information from an Integrated Library System (ILS) Acquisitions module to an Electronic Resource Management System (ERMS) or other applications that can make use of this information. The ability to request financial data (whether for display or for writing to populate the ERM) from the ILS Acquisitions system enables both real-time lookups and cost-per-click and other cost-related reports in the ERMS all the more possible, without the work of manually entering the same data in two different systems. Using defined XML data schemas, we anticipate the standard will provide a common method of requesting cost-related information from an ILS for a specific electronic resource, within the boundaries of a subscription period. Once defined, implemented and successful, it is likely that this standard could be expanded to include other elements for purposes not yet envisioned.

In late 2006, as a next step in the progress of the Electronic Resource Management Initiative, Norm Medeiros (Haverford College), Linda Miller (Library of Congress), Adam Chandler (Cornell) and Angela Riggio (UCLA) queried a number of librarians, ERMS suppliers, and ILS vendors to discover which elements from an ILS would most likely be required to facilitate cost management within the context of the ERMS. They published their findings in their "White Paper on Interoperability between Acquisitions Modules of Integrated Library Systems and Electronic Resource Management Systems" (http://www.diglib.org/standards/ERMI_Interop_Report_20080108.pdf).

Building upon this work, we expect to precisely define and validate the data elements to be exchanged, specify which are required and which are optional, as well as specify the protocol which will be used to transport the data from one system to another. We also expect that the inclusion of Use Cases would also help those ERM and ILS vendors engaged in developing software to better understand the dataflow expectations.

Statement of Work:

These, then, are the goals and objectives of the project, along with the means we plan to use to accomplish the goals and objectives.

- Project Goals:
 - Develop and refine the list of data elements to be exchanged between an ERMS and ILS in order to facilitate the population of the ERMS with cost and related financial and vendor information found in the automated Acquisitions or other financial system.
 - Create a transport protocol useful in moving these data elements from one system to another.
 - Write a small number of Use Cases which will help ILS and ERMS system creators understand the capabilities and expectations of the protocol.
- Specific Deliverables and Objectives:
 - The outcome of the project would be a draft standard for trial use (DSTU) which includes a list of data elements (required or optional) to be used as match points for information for display and for use to populate the ERMS cost management system.
 - This draft shall also include a transport method and mechanism (possibly Web services and XML), as well as a few use cases to help set expectations for the work-flow and sequence of data elements to be exchanged.
 - Much of the work that has been done to date includes discovery of data elements available from the ILS for transfer into the ERMS. It is likely that a more formal method will be used to survey the various ERMS and ILS vendors and librarians to validate those specified so far, and discover if there are any crucial elements which have not yet been considered.
- Process:
 - Appoint a Working Group
 - Appoint a possible Response Panel
 - Organize the work via teleconference and email.
 - Validate and finalize the data elements used for match points and data population
 - Create a data transfer protocol (e.g. XML) and document it
 - Call for testers
 - Gather test results
 - Propose and execute changes, based on test results

Partners and Participation:

The organizations that have a stake in this issue are:

- Librarians who have implemented an ERMS which has a cost management module, have purchased and invoiced their e-resources through their ILS Acquisitions system, and would like to transfer the cost information from their ILS to the ERMS.
- ERMS creators who have built a cost management system and are in a position to change their systems to a) record the ILS order match-point, b) send the match-point to the ILS and c) process, display or integrate the cost data returned from the ILS.
- ILS creators who are in a position to change their ILS systems to accept a match-point sent from the ERMS and create a response message with cost, vendor and other information specified in the standard and available in the system.
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This process will require individuals with the skills to:

- Help validate and describe the data elements which will be used in the transfer.
- Help create the XML schema to facilitate the exchange of the CORE data.
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Similar or related standards already in use:

- The closest standard we can think of is EDItX, an XML version of EDIFACT developed by EDItEUR for specific EDI functions, including the transfer of Order, Claims and Invoicing information. We propose to examine whether this can be used, but suspect it may be too heavy for our purposes, while not providing for all the precise data elements we need.

Timeline:

Provide target dates using Months from Project Approval for the stages of the work. For developing a standard or recommended practice, include:

Pending approval and support from NISO the first half of December, we would plan the process, based on the following timeline:

- Appointment of Working Group or other Participants by May 31, 2008
- Approval of initial Work Plan by August 1, 2008
- Completion of Information Gathering by November. 1, 2008
- Completion of the XML schema by January. 1, 2009
- Completion of Initial Draft Standard for Trial Use (DSFTU) by February. 1, 2009
- Completion of Final Draft by March 31, 2009
- Ballot, Approval, and Publication (For ANSI/NISO Standard) by September 30, 2009

Funding:

We do not anticipate needing any more funding outside of what NISO generally uses to support a few (6 or so) phone conferences.