



## URM and Its Benefits

FAQ

## CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

## DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

## TRADEMARKS

"Ex Libris," the Ex Libris bridge, Primo, Aleph, Alephino, Voyager, SFX, MetaLib, Verde, DigiTool, Preservation, URM, Voyager, ENCompass, Endeavor eZConnect, WebVoyage, Citation Server, LinkFinder and LinkFinder Plus, and other marks are trademarks or registered trademarks of Ex Libris Ltd. or its affiliates.

The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32,

Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc.

Google is a registered trademark of Google, Inc.

Copyright Ex Libris Limited, 2009. All rights reserved.

Document released: May 2009

Web address: <http://www.exlibrisgroup.com>

# URM and Its Benefits: FAQ

---

## **What is URM?**

The Ex Libris™ Unified Resource Management (URM) framework provides an open, extensible platform that will support emerging and future needs, positioning libraries to better serve the overall teaching and research missions of their institutions they serve. The URM environment will lower the cost of traditional library operations; its network-level infrastructure will streamline workflows for the management of print, electronic, and digital assets; and will offer new opportunities for collaboration, delivering increased efficiency and reducing redundancy within and across libraries.

## **How will URM increase library efficiency and lower costs?**

URM will enable libraries to efficiently and effectively manage the full life cycle of all types of resources, regardless of format or acquisition method, at significantly lower costs than libraries incur today. By unifying the processes associated with obtaining, describing, managing, distributing, and analyzing diverse resources, URM will assist libraries in reevaluating and redesigning their back-office processes, optimizing staff resources, integrating library systems more fully with other applications used by the organization, focusing new attention on underserved areas, and successfully addressing user needs.

Economic realities have increasingly encouraged libraries to seek new ways of working together at a network level. By centralizing data and services in a software-as-a-service environment, Ex Libris URM will support flexible models for collaboration across the functional spectrum—from cooperative collection development to more seamless sharing of

metadata and resources with partner libraries. In this new network environment, libraries will be able to join forces to leverage technical support, purchasing power, collections, and even staff knowledge and resources.

Today's library collections reach far beyond traditional published material including the management of such items as primary datasets and associated research output, learning objects, and institutional archives. URM will provide the tools that libraries need for working in this new environment and expanding the library's role in managing the intellectual output of the institution.

Modularity and extensibility, facilitated by a service-oriented architecture (SOA), fully documented Web services and application programming interfaces (APIs), are keystones of the URM framework. The ensuing URM framework will be easy to customize and enhance through locally developed code extensions that can be shared within the customer community via the [Ex Libris EL Commons Website](#), which serves as a host for collaborative efforts.

### **How will URM differ from an integrated library system?**

One of the key advantages of URM—and a feature that distinguishes it from current integrated library systems—is the unification of workflows regardless of the type of material being managed or the method of its acquisition. In the foreseeable future, libraries will continue to work in a hybrid environment, managing different back-office processes related to print, electronic, and digital assets. Bringing together the selection, acquisition, management, and distribution of the entire library collection will provide new efficiencies, reducing costs and improving the service to users.

Libraries however will have to do much more than redesign current processes to achieve greater efficiency in order to meet the expectations of today's users. Undertaking entirely new kinds of activities has become equally as important. While URM incorporates the key capabilities of integrated library systems and electronic resource management systems, it is unique in that it will also enable libraries to go beyond traditional functions to provide new service offerings to institutions and the academic community. From its use of a centralized data-services environment to its unified workflows for all types of library assets, the URM platform offers libraries with a new infrastructure that will support different—and increasingly important—tasks: the management of an institution's intellectual output, a greater level of engagement in teaching and learning activities, and more. Although many of these tasks once lay outside of the library domain, changes in technology and the academic landscape have created a demand for libraries to assume a stewardship role regarding their institution's intellectual activities and output.

#### **When will the first version of URM be released?**

Ex Libris is now finalizing requirements with its user community and development partners. Current plans call for a beta release of URM 1.0 in mid-2011 and a general release at the end of that year.

## **URM Functionality**

#### **What will the first release of URM include?**

The first release of URM will support full life-cycle management for print and electronic resources, providing libraries with more streamlined processing and enabling them to lower management costs.

URM 1.0 will support the following areas:

- Collection development
- Acquisitions, including the management of both financial and license terms
- Cataloging and inventory maintenance, using current and emerging metadata standards
- Fulfillment, including new functionality necessary to streamline resource-sharing activities
- Dissemination control, including a new tool for publishing the library's collection in user-discovery spaces
- Access to a central knowledge base, which will provide availability information for electronic resources in support of linking and other tasks
- Consortium support across functional areas
- Multilingual requirements
- Reporting and analysis tools necessary to make data-driven decisions about library activities and collections

URM 1.0 will also support a centralized system for managing metadata (the Metadata Management System) and a data-services environment, which together will provide new ways of creating, managing, and sharing metadata and other types of information that is common among libraries.

The URM design and development effort is grounded in the Ex Libris commitment to open interfaces and community-developed software, enabling libraries to customize their URM deployment according to local needs.

## **How are you obtaining input from the library community about URM requirements?**

As part of its development processes, Ex Libris is working in close cooperation with library and industry partners as well as its worldwide user community. Specifically, Ex Libris has created the following formal collaborative roles:

- Development partners: libraries that are engaging with Ex Libris intensively to validate the URM requirements and design and to participate in software testing
- URM focus groups: functionally-focused groups to advise Ex Libris on specific requirements in the areas of selection/acquisitions, metadata, fulfillment, and consortium support. Ex Libris has worked closely with the ELUNA and IGeLU user groups to solicit nominations to ensure that libraries in diverse geographic regions and of diverse types and sizes would be amply represented.
- Strategic partners: Complementing the detail-oriented role of the focus groups, strategic partners which represent the wider library community, are charged with advising Ex Libris on emerging issues in the library landscape and helping to ensure that URM remains aligned with the high-level goals of today's libraries.

Additional focus groups and other formal collaborative forums will be established throughout the course of the project. If your institution is interested in participating in one of these activities, please contact Susan Stearns, VP of strategic partnerships, at [susan.stearns@exlibrisgroup.com](mailto:susan.stearns@exlibrisgroup.com).

## **Where can I learn more about the conceptual design and functionality of the URM framework?**

Ex Libris has published a white paper (located on the URM Resource Center) that describes the conceptual framework of URM; this paper is an excellent starting point for learning more about planned URM functionality.

Ex Libris will offer numerous opportunities for libraries to learn more about the company's plans and to provide input, including regional information sessions, discussion groups at key conferences, Webinars, and postings on our [New Initiatives blog](#). [The URM Resource Center](#) is your source for details about these activities, as well as all of the latest information on URM.

### **What does URM mean for Aleph and Voyager customers?**

With the move to a next-generation library management system, libraries will be able to “turn off” their current integrated library systems and begin working exclusively on the URM platform. In this respect, URM replaces Aleph® and Voyager®.

That said, Ex Libris recognizes that not all libraries will be ready to migrate to a next-generation system right away. Therefore, Aleph and Voyager will continue to be actively developed, enhanced, and supported; there is no planned end of life for either of the Ex Libris ILS products. In fact, the roadmaps for both Aleph and Voyager include many customer-requested enhancements, demonstrating the Ex Libris commitment to ongoing investment in our ILS products.