eResource Technical Document

Last Published April 21, 2016

Purpose

The E-Resource e-doc covers all aspects of managing titles that are delivered or provided in electronic form consisting of e-books, e-journals, images, music, video, etc. in OLE. It is used to store and view the information about an electronic resource acquisition, including the titles involved and the content provider. Information related to acquisition such as titles, payment, licensing, invoices, administrative, and contact information are also maintained here.

The following document dwells in relative detail on the various technical aspects of E-Resource documents. Institution specific changes are also highlighted where applicable.

Dependencies (db tables)

Tables used in the E-Resource Record

ole_e_res_access_t	Access
ole_e_res_rec_event_log_t	E-Resource Event log
ole_e_res_rec_ins_t	Resource Instance
ole_e_res_rec_inv_t	Resource Invoice
ole_e_res_rec_lic_t	Resource License
ole_e_res_rec_po_t	E-Resource record Purchase Order
ole_e_res_rec_t	E-Resource Record Document
ole_e_res_stat_t	E-Resource Status
ole_eres_nte_t	E-Resource Notes
ole_eres_req_sel_comm_t	Resource request Comments
ole_eres_req_t	Resource Request
ole_eres_sel_t	Resource Selector
ole_pckg_scp_t	Package Scope
ole_pckg_typ_t	Package Type
ole_pymt_typ_t	Payment type
ole_req_prty_t	Request Priority

ole_agreement_t	Agreement Document[1]

Tables where the E-Resource Record is used/referenced

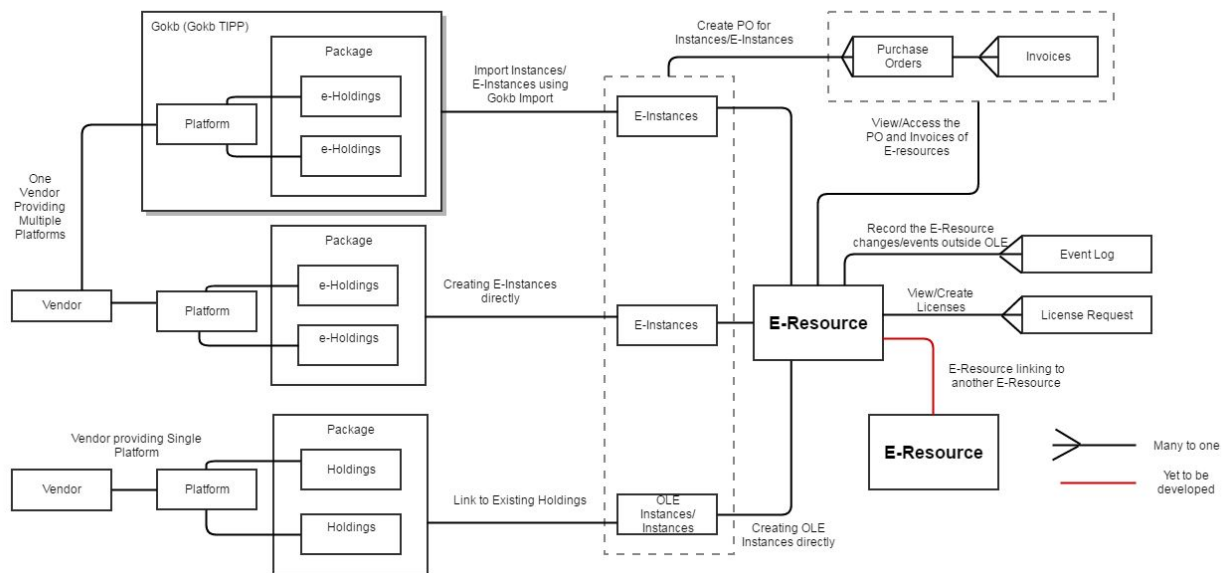|	
ole_mtrl_typs_t	Material Types
ole_frmt_typs_t	Format Types
ole_cont_typs_t	Content Types
ole_vrnt_ttl_t	Variant Title
ole_copy_t	Copy
ole_eres_sync_gokb_log_t	Synchronization Gokb log
ole_e_res_create_po_t	Create E-Resource Purchase Order
ole_e_res_acctg_ln_t	Accounting Line
ole_gokb_review_t	Gokb Review
ole_gokb_change_log_t	Gokb Change Log
ole_gokb_archive-t	Gokb Archive

Logical Data Model (Class Structure)

Each E-resource record is a combination of one or more Instance or E-Instance (henceforth addressed as Instance). The Instances comprise of the package which holds the holdings and the platform in which they are hosted. The platforms are in turn provided by Vendors. Instances are either imported from Global Open KnowledgeBase (GOKb) or created new. Existing instances can also be linked directly with the E-Resource. The Purchase orders and Invoices are also part of the E-Resource Record to help identify prices and related fund codes for attached holding records. The E-Resource record also enables to create Licenses Requests and maintains all the change related logs in the Event log.
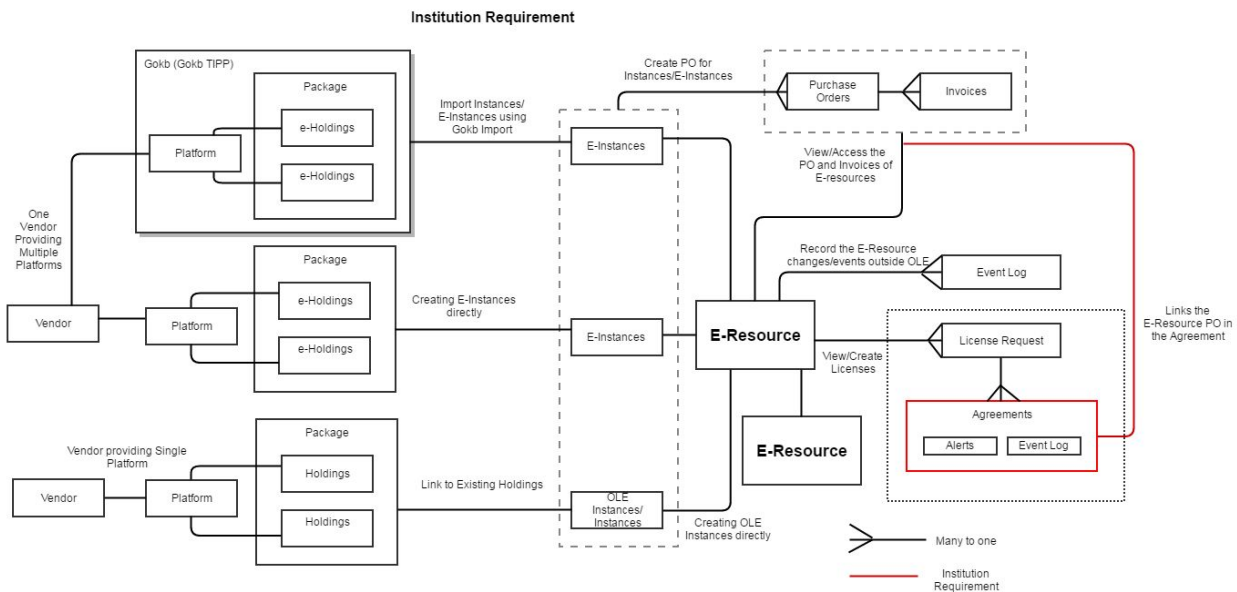
Linking one E-Resource to the other E-Resource is not yet developed and will serve as an enhancement in the future development.

The below diagram represents the various entities and their relationships associated with the E-Resource record.

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[1] Implemented for SOAS specific requirement

Last Published April 21, 2016

SOAS requirements in E-Resource needs specific documents to record agreement terms which can be linked to E-Resources/E-Holdings. The below diagram represents the changes.
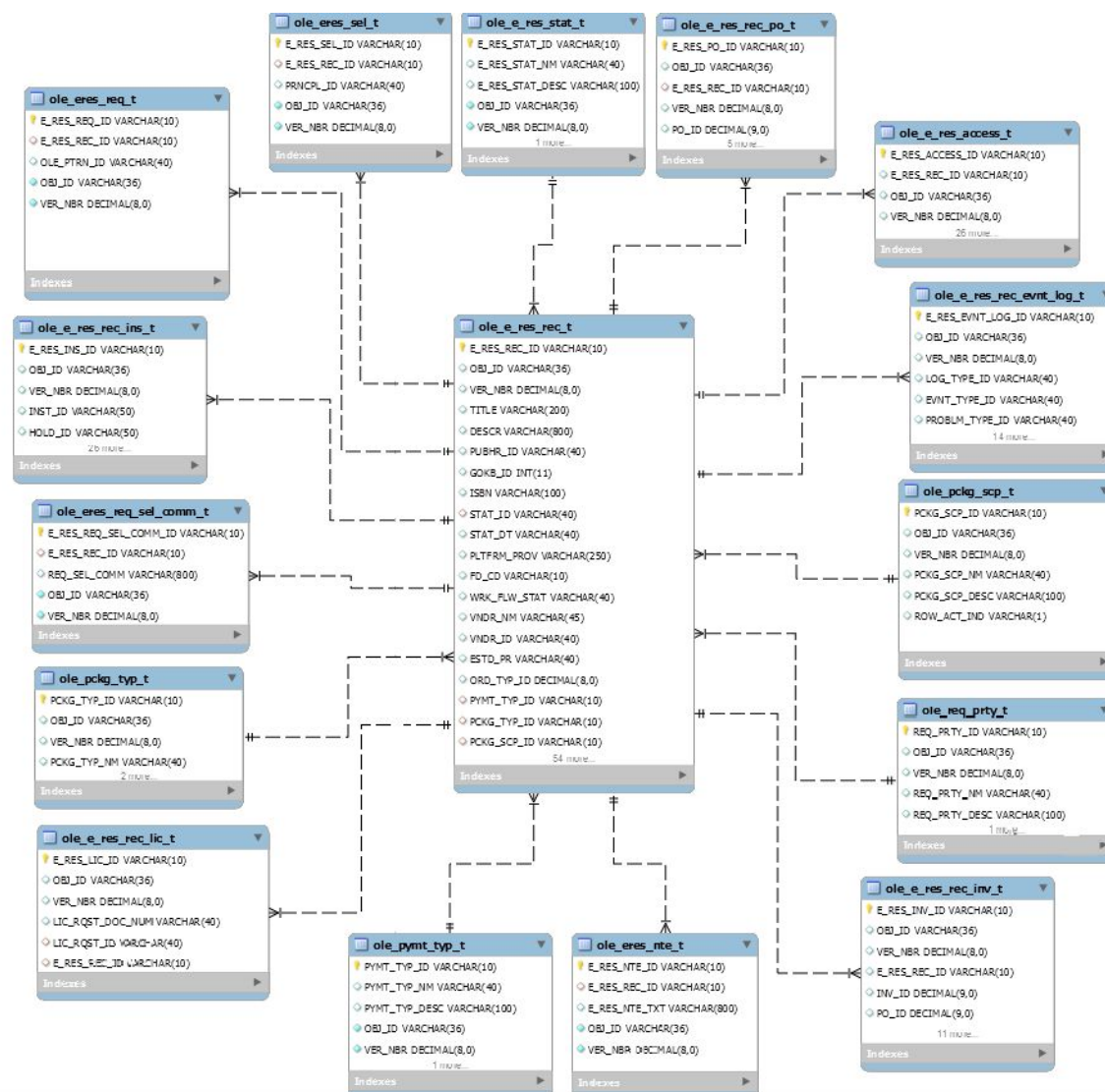

Physical Data Model (Database Schema)

The E-Resource record is maintained in the main ole resource table (ole_e_res_rec_t). Other data such as the notes (ole_eres_nte_t), package type (ole_pckg_typ_t), package scope (ole_pckg_scp_t), access acquisitions such as material type (ole_mtrl_typs_t), content type (ole_cont_typs_t) and format type (ole_frmt_typs_t) are maintained in their respective tables.

The purchase order (ole_e_res_rec_po_t) table is linked to the E-Resource record table (ole_e_res_rec_t) to hold the PO information of any instances that are linked with the

E-Resource table. Similarly the Invoices table (ole_e_res_rec_inv_t) holds the invoices with respective to Purchase orders particular to that E-resource record.

There is a separate License request table (ole_lic_reqs_t) that is used to maintain the License requests and link it to particular E-Resources.
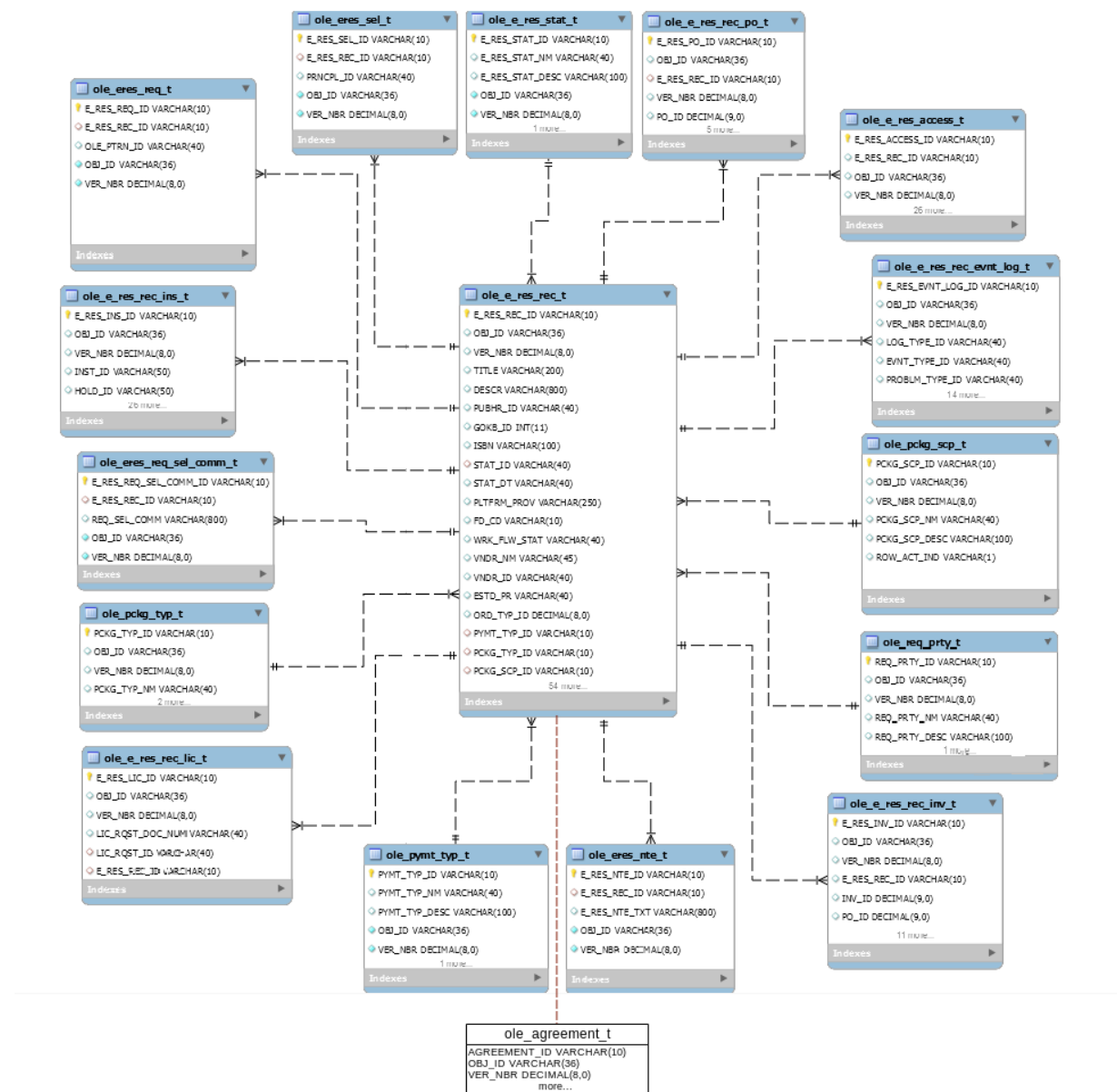
The Event log table holds the audit trail information made to the E-Resource Record or information regarding the events that took place outside of OLE.

Note: All the acquisitions information such as material type, content type, format type have no direct reference to the E-Resource record but are linked through the OLE Record by OLEERSIdentifier. Similarly Payment type and the Request Priority are directly linked to the OLE Record which is referenced through the PYMT_TYP_ID and REQ_PRTY_ID respectively.

The Gokb import of the instances syncs with the E-Resource record through the ole_eres_sync_gokb_log_t, the instances review details in the ole_gokb_review_t and any changes to the Gokb import is maintained under the ole_gokb_change_log_t .All the archive details are stored under the ole_gokb_archive-t.

The above model represents the E-Resource record document relationships with various entity tables
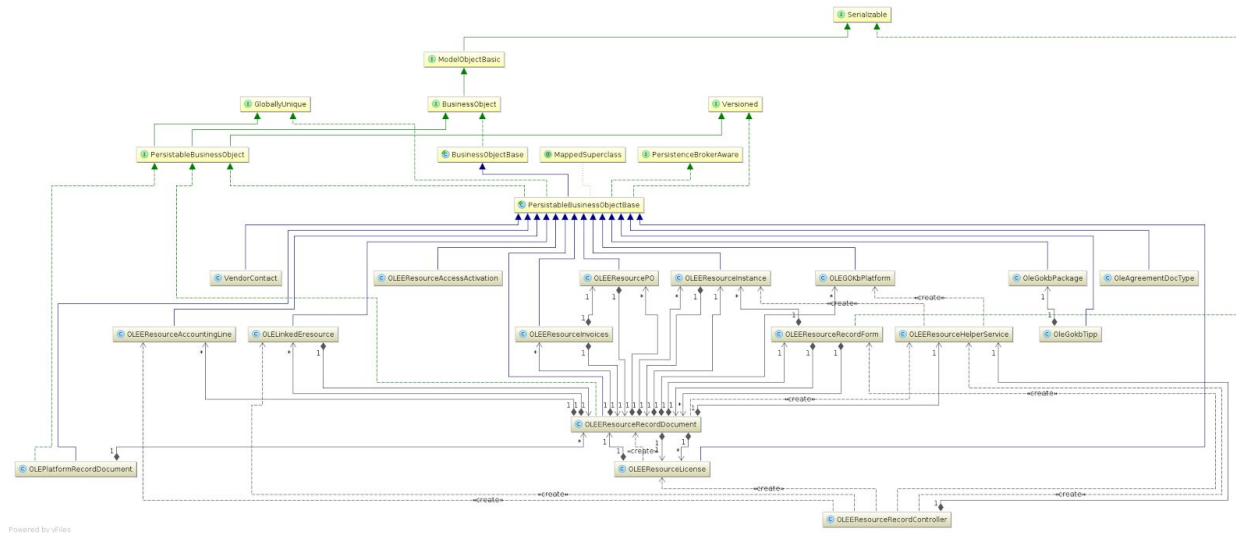

The above model represents the ER diagram based on SOAS' requirement to have Agreement terms linked to the E-resource record. This is achieved by having an agreement table (*ole_agreement_t)* which would contain all agreement terms that are to be recorded.

Last Published April 21, 2016

All tables with persistable data contains two properties by default – Version Number and Object Id. This is in order to take advantage of KRAD features. More information can be found in Rice Documentation here.

Service Interface Design (Java)

The class OleEResourceRecordController extends OleTransactionalDocumentControllerBase and it overrides the necessary methods.

Maintenance Documents are primarily used for creating and maintaining data elements.The OLEEREsourceAccessMaintenanceDocument.xml and the OLEEResourceStatusMaintenanceDocument.xml are used for defining the access and status properties for the E-Resource record

The method to create the E-Resource License request is called by *performCreateLicenseRequest* method of the OLEEResourceRecordController class..Adding purchase orders to the E-Resource is done through the *addPOForEResource method.* The import and synchronization of the Gokb instances with the E-Resource is done through the *importData* and *synchronizeWithGokb* methods.

The other class OleEResourceHelperService is used internally in the controller to validate, build and return POJOs. A lot of business rule validations are done in this class as well.

For SOAS' requirement to include agreement terms, a new business object class for agreement would be created and a form to collect the data would be used. This data would be stored in the respective table and linked to the e-resource through a foreign key.

For more information, Javadocs can be found here.

Last Published April 21, 2016

Service Interface Design (SOAP)

Not Available

User Interface Design

The E-Resource document uses KRAD's UIF (User Interface Framework). A very good guide on this can be found here. The Spring Beans XML used in the case of E-Resource is the OLEEResourceRecordDocument.xml under the data dictionary folder.

Data Importing

E-resource license record data can be imported through Batch Processes. A more detailed document on Batch Process can be found here.

Data Exporting

OLE uses a RDBMS backend and hence any data can be exported using simple SQL queries. Currently there is no direct way in which Patrons can be exported directly from OLE.

Workflow

The E-Resource document has four different workflows that can be found in the "*Workflow" section* of the E-Resource page. The four workflow types include Trials, Licensing, Purchasing through a Requisition and Purchase Order and Activating Patron Access. At present the Licensing workflow such as reviews, approvals, signatures, or notifications alone is supported and others are to be implemented in a future release.

System Parameters

Namespace Code	Parameter Name	Description
OLE-SELECT	ALERT_ENABLED	This is for configuring the default renewal alert enabled while changing the configuration in admin tab
OLE-SELECT	BUILDING_CODE	This is for configuring the default building code while creating the PO through E-Resource

OLE-SELECT	BUILDING_RO OM_NUMEBR	This is for configuring the default building room number while creating the PO through E-Resource
OLE-SELECT	CHART_CODE	This is for configuring the default chart code while creating the PO through E-Resource
OLE-SELECT	COST_SOURC E	This is for configuring the default cost source while creating the PO through E-Resource
OLE-SELECT	DELIVERY_CA MPUS_CODE	This is for configuring the default delivery campus code while creating the PO through E-Resource
OLE-SELECT	FUNDING_SOU RCE	This is for configuring the default funding source while creating the PO through E-Resource
OLE-SELECT	LOCATION	This is for configuring the default location while creating the PO through E-Resource
OLE-SELECT	METHOD_OF_ PO_TRANSMIS SION	This is for configuring the default method of po transmission while creating the PO through E-Resource
OLE-SELECT	NO_OF_PARTS	This is for configuring the default no of parts while creating the PO through E-Resource
OLE-SELECT	NOTICE_PERI OD	This is for configuring the default notice period while changing the configuration in admin tab
OLE-SELECT	ORG_CODE	This is for configuring the default organization code while creating the PO through E-Resource
OLE-SELECT	PURPOSE_TY PE	This is for configuring the default purpose type while creating the PO through E-Resource
OLE-SELECT	QUANTITY	This is for configuring the default quantity while creating the PO through E-Resource
OLE-SELECT	REQ_DESC	This is for configuring the default document description while creating the PO through E-Resource
OLE-SELECT	USER	This is for configuring the default user while changing the configuration in admin tab

Roles, Permissions and Responsibilities

Permissions and Responsibilities are linked to roles which are in turn linked to Users to give them access to screens and functions.

Permission ID	Permission Name
OLE10135	License Request workflow initial filter
OLE10136	Full License Request workflow
OLE10137	License Request secondary filter
OLE10269	Initiate E-Resource Record
OLE10270	Edit E-Resource Record
OLE10326	Initiate Platform Record
OLE10327	Edit Platform Record
OLE10328	Delete E-Resource Record
OLE10329	Delete E-Resource Instance
OLE10135	License Request workflow initial filter
OLE10136	Full License Request workflow
OLE10137	License Request secondary filter
OLE10500	Save E-Resource Record
OLE10169	Initiate Checklist Document
OLE10170	Edit Checklist Document
OLE10171	Initiate License Request Status Document
OLE10172	Edit License Request Status Document
OLE10173	Initiate Current Location Document
OLE10174	Edit Current Location Document
OLE10175	Initiate License Request Type Document
OLE10176	Edit License Request Type Document
OLE10177	Initiate Agreement DocType Document
OLE10178	Edit Agreement DocType Document
OLE10179	Initiate Agreement Method Document

OLE10180	Edit Agreement Method Document
OLE10181	Initiate Agreement Status Document
OLE10182	Edit Agreement Status Document
OLE10183	Initiate Agreement Type Document
OLE10184	Edit Agreement Type Document
OLE10185	Blanket Approve
OLE10190	Edit License Request Document
OLE10191	Save License Request Document
OLESEC6001	Initiate Document AccessSecuritySimpleMaintenanceDocument
OLESEC6002	Look Up Records KFS-SEC
OLESEC6003	Inquire Into Records KFS-SEC

Role ID	Role Name	Permissions
OLE10064	OLE_Selector	OLE10269, OLE10270, OLE10328, OLE10329, OLE10500
OLE10065	OLE_Head	OLE10269, OLE10270, OLE10328, OLE10329, OLE10500
OLE10066	OLE_Acquisitions-select	OLE10269, OLE10270, OLE10328, OLE10329, OLE10500
OLE10067	Collection Management	OLE10269, OLE10270, OLE10328, OLE10329, OLE10500
OLE10068	OLE_E-Resource	OLE10269, OLE10270, OLE10327, OLE10328, OLE10329, OLE10500
OLE10057	OLE_LicenseConfiguration	OLE10136, OLE10169, OLE10170, OLE10171, OLE10172, OLE10173, OLE10174, OLE10175, OLE10176, OLE10177, OLE10178, OLE10179, OLE10180, OLE10181, OLE10182, OLE10183, OLE10184, OLE10185, OLE10186, OLE10187, OLE10188, OLE10189, OLE10190, OLE10191

OLE10051	OLE_Signatory	OLE10137
OLE10052	OLE_LicenseManager	OLE10190, OLE10191
OLE10053	OLE_Licenses	OLE10135, OLE10190, OLE10191
OLE10054	OLE_LicenseReviewer	OLE10190, OLE10191
OLE10071	OLE_E-ResourceManager	OLE10326, OLE10327
OLE10069	OLE_Cataloger	NA
OLE10070	OLE_Circ_Staff	NA
OLE10014	OLE_ERMS	OLE10015,OLE10017,OLE10021,OLE10042 ,OLESEC6001,OLESEC6002,OLESEC6003

Responsibility ID	Responsibility Name
OLE990059	Review E-Resource Acquisition
OLE990060	Review E-Resource Cataloger