Three S’s of Electronic Resource Management: Systems

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What is an Electronic Resource
Early challenges for libraries ...

• Integrated library systems not originally designed to accommodate electronic resource data
  ‒ Resource
  ‒ License
  ‒ Coverage database
  ‒ Usage statistics

• Internal workflow issues
  ‒ Electronic resource data in many formats and locations; not centralized
  ‒ Data not integrated into ILS
Early challenges for patrons ...

• No single search and discovery point for both print and electronic holdings
• Electronic holdings typically in separate database silo

Electronic Resource Management Initiative (ERMI)

• Workshop co-sponsored by NISO and the Digital Library Federation (DLF) in 2002
• ERMI evolved under the guidance of DLF to pull together common specifications and tools to effectively manage licensed electronic resources
• Landmark report published in August 2004
Electronic Resource Management: The Report of the DLF Initiative

• “An Electronic Resource Management system is a system encompassing a wide range of functions throughout the electronic resource life cycle …”

Electronic Resource Management: The Report of the DLF Initiative

• “… including but not limited to:
  - Ordering
  - Acquisition
  - Maintenance and renewal process
  - Generation and maintenance of discovery tools such as e-resources web pages
  - Recording and presentation of license information such as authorized users and permitted uses”
Early ERM system challenges...

Since 2004...

The Colorado Alliance of Research Libraries
ExLibris
Innovative Interfaces
Serials Solutions

ERM Essentials™
Open ERAM
HARRASSOWITZ

Hesburgh Libraries
University of Notre Dame
Coral

Murphy Library
University of Wisconsin-La Crosse
ERMes

OLE Project

SFU

CUFTS

360 Resource Manager
SwetsWise eSource Manager

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Since 2004 …

Where are we today?
Many ERM choices for different requirements

- A-Z List
- Link Resolver
- Federated Search
- Enriched content
- Electronic resources in separate catalog
- Everything in one place; regardless of format & location
- Usage statistics
- Cost per use
- Title overlap

ERM System

- Bibliographic
- Knowledgebase
- Catalog
- Acquisitions
- COUNTER
- SUSHI
- ERMI
- ONIX-PL
- CORE
- Catalog
- Acquisitions
- COUNTER
- SUSHI
- ERMI
- ONIX-PL
- CORE
- Standards & Best Practices
- Reporting Tools
- OPAC & Discovery Platform
- Related Products & Services
- Metadata Services
- ILS Integration

At the same time, many challenges …

- Many academic libraries now spend in excess of 60 to 70% of resource budgets on electronic resources each year
- Economic reality … budgets are shrinking
- There is increasing pressure to maximize use of electronic resources
At the same time, many challenges …

• Many libraries struggle with the same workflow issues

• Many still spend more time and energy controlling traditional paper resources which make up a smaller portion of the budget

As a result …

• Workflows are shifting, not always a linear process
• Library staff duties are shifting
• “Big picture” is shifting
  ─ Print and electronic?
  ─ One system vs. interoperable products and services?
  ─ What are the most critical areas and priorities?
  ─ Do these fit into long-term objectives?
Where do we go from here?

What libraries can do …

- Identify opportunities for increased efficiency
- Get involved with stakeholders
  - Patrons
  - System vendors
  - Subscription/publisher services
  - Other libraries
  - Standards organizations
What ERM system vendors can do …

• Solicit library feedback
  – Conferences, user groups, customer support, email, listserv etc.

• Partner with other stakeholders
  – Standards organizations and interest groups
  – Other product and service providers

• Adopt industry standards and best practices

ERM Data, Standards & Best Practices Review

• Ivy Anderson (co-chair, California Digital Library)
• Tim Jewell (co-chair, University of Washington)
• Jeff Aipperspach (Serials Solutions)
• Jeanne Downey (University of Houston)
• Deberah England (Wright State University)
• Rafal Kasprowski (Rice University)
• Tim McGeary (Lehigh University)
• Bob McQuillan (Innovative Interfaces)
• Angela Riggio (UCLA)
ERM Data, Standards & Best Practices Review

• NISO working group to undertake “gap analysis” regarding ERM related data, standards and best practices

ERM Data, Standards & Best Practices Review

• Deliverable will highlight current work that provides solutions for specific areas of ERM use, identifies gaps where work has not been done, and recommends appropriate further work
  - Report to be delivered to the NISO Business Information Topic Committee and made publicly available
ERM Data, Standards & Best Practices Review

- Consult with vendors, libraries using ERM systems and other stakeholders for additional feedback
- Describe challenges libraries face with current ERM systems
- Identify gaps in interoperability and best practices
- Make recommendations regarding future of ERMI dictionary

ERM Data, Standards & Best Practices Review

- Standards mapping with ERMI
  - Working from related standards and best practices
  - Determine correspondence, overlap
  - Compare meanings and uses
  - Determine whether ERMI data dictionary should address, or relevant standard (w/revisions) sufficient to address ERM needs
  - Discovery of gaps in existing standards

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Why Standards?

- ERMI was not a standard
- Libraries want:
  - Simplified license agreements
  - Workflow tools and best practices
  - Authority control for products and vendors
  - Interoperability and data transport
  - Holdings data for ebooks and ejournals

Why Standards?

- Reduce re-keying
- Reduce maintenance cost & disruption
- Durability of data
- Avoid supplier lock-in
- Easier development path
- Platform for collaboration
- Whole system economies

Source: “The Business Case for Standards” (JISC)
For More Information

ERM Data, Standards & Data Review
Working Group

http://www.niso.org/workrooms/ermreview

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