What Value Do ERM Systems Bring to Libraries?

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NISO Forum
E-Resource Management: From Start to Finish (and Back Again)
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"My interest in the new technologies in technical services in libraries arises from the simple belief that technology, if intelligently applied, can bring three important benefits. It can improve the efficiency of our service to library users; it can enable us to spend our limited resources more sensibly; and it can improve the nature of the work of all employed in the library. The last of these advantages is too often ignored."

-Michael Gorman

Electronic Resources Librarian

Responsibilities include:

Negotiation and administration of new and existing licensing for electronic resources

Consulting with University Counsel to resolve license and contract issues

Researching license agreements in order to place new subscription orders

Developing and maintaining guidelines for standard licensing terms

Electronic Resources Librarian

Monitoring subscriptions in relation to existing license expirations and renewals

Reviewing the impact of current licensing on post cancellation archival access

Collecting usage statistics

Arranging for trials

Registration and activation of electronic subscriptions

Troubleshooting e-access problems reported by patrons and other library staff

"You get no more out of an ERM than you are willing to put in."

-Donna Ekart

Communications 101

WORKFLOW TRACKING	Lic. Libr.	Triads Coord (TC)	Pub. Serv.	Coll. Dir. (CO)	Dig. Init. Lib.	ERG	DOTS	Proxy Server	Serial.	SFX Admin.	Web admin.	I-R Cat.	Trial Req.	Status Chang.
Trial request	I	T				T							I	System
Trial pending	I	T	I	I	I	I							I	TC
Trial delayed	I	I	I	I		I							I	TC
On trial	I	I	I	I	T	I						I	I	TC
Under consideration	I	I	I	T		T							I	System
In negotiation	T		I	I	I	I	I		I			I	I	CO
Purchase delayed	I		I	I	I	I	I		I				I	CO
Purchase declined	I		I	I	I	I	I		I				I	CO
Decision pending	I		I	T		I			I				I	CO
On order	I		I	I	I	I	I		T			T	I	CO
Activation pending	I		I	I	I	I	I		T				I	Serial.
Active	I		I		T	I	I	T	I	T	T	T	I	Serial
Cancelled (pending)	I		I		I			T	T	T	T	T	I	CO
Cancelled (some access)	I		I		I	I	I		I	I		I	I	Serial.
Cancelled (no access)	I		I		I	I	I	I	I	I	I	I	I	Serial.

What is electronic resource management, really?

Discrete tasks that form an intricate matrix of processes that rely on timely, appropriate information exchange among distributed staff.

ERMS Marketplace

2005

- Innovative *ERM*
- Dynix *Horizon*
- SIRSI *ERM*
- Endeavor *Meridian*
- Ex Libris *Verde*
- VTLS *Verify*
- Serials Solutions *ERMS*
- TDNet *TeRMS*
- CARL *Gold Rush*
- Harrassowitz *HERMIS*

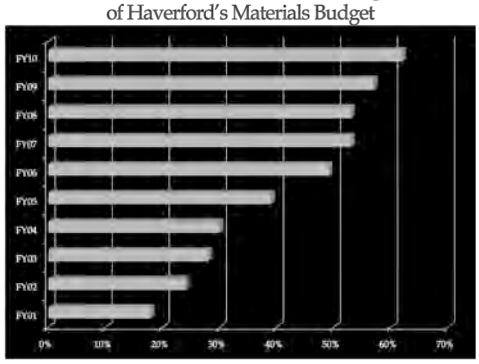
2008

- Innovative *ERM*
- Ex Libris *Verde*
- Serials Solutions *360 Resource Manager*
- TDNet *Open ERAM*
- CARL *Gold Rush*
- Harrassowitz *HERMIS*
- Swets *SwetsWise eSource Manager*

"In theory, ERMs are a winner. Yet in practice, we have discovered that ERMs do not immediately solve all the problems we expected."

-Jill Grogg

Electronic Resources as a Percentage of Haverford's Materials Budget

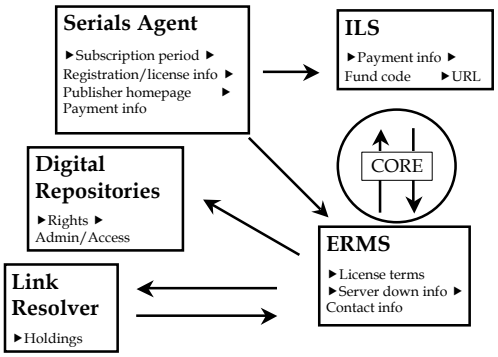


Guiding Principles

1. The system should support both management of, and access to, electronic resources without creating duplicate systems and duplicate data entry.

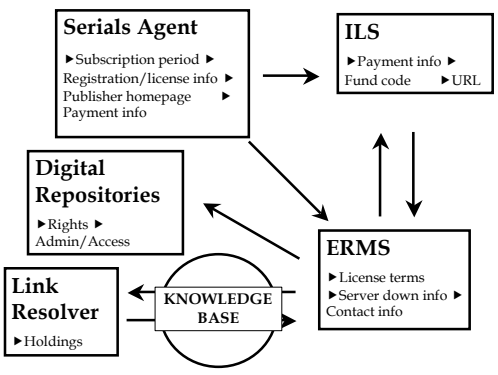
Guiding Principles

2. The system should provide the capability for the input of complex data in one place as well as enable the use of that data in many places, either by integrating functionality or by normalizing data to allow for easy import or export.



Guiding Principles

3. The system should be designed to allow for global updating and have enough customization capability/flexibility to allow for the addition of fields.



Guiding Principles

4. It should have the capacity to display records for both public and staff, with versions of the display tailored to the appropriate category of user.

Guiding Principles

5. It should be interoperable with other systems and be able to share data with OPACs, Web portals, and link resolvers.

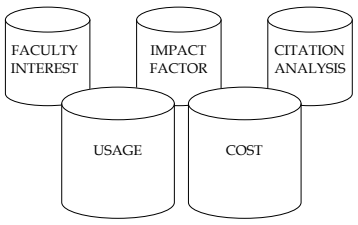
"Interoperability is the biggest lie in automation today. The word is thrown around as easily and meaninglessly as friend. Interoperable is, at best, an adjective for standards-based systems, and, at worst, a hack to cover up the fact that different systems are not meant to speak to one another."

-Andrew Pace

Guiding Principles

6. It should be able to store, access, and search for information and be able to generate reports.

Decision Support System



"The ideal ERM system would bring together information I need when I make cancellation and swap decisions. I would like to have usage statistics and cost per download appear automatically in my ERM. And I would like a place to note low usage so I can pull those titles out easily when reviewing titles to drop. I would like the ISI impact factor and the rank the journal holds in the ISI subject breakdown. I would like to have a place for the Eigenfactor and other journal-ranking systems. I would like to include interlibrary loan information. I would like to include whether a journal is indexed in Medline as well as its language of publication."

-Susan Klimley

Report Card

1. The system should support both management of…
2. The system should provide the capability…
3. The system should be designed to allow…
4. It should have the capacity to display…
5. It should be interoperable…
6. It should be able to store, access…

Success Stories

- Resource Administration & Management Functions
- SUSHI
- Training program for license mapping
- ONIX-PL
- CORE

CORE: Cost of Resource Exchange


White Paper on Interoperability between Acquisitions Modules of Integrated Library Systems and Electronic Resource Management Systems

Prepared by a Subcommittee of the Digital Library Federation's Electronic Resource Management Initiative, Phase II

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CORE: Cost of Resource Exchange

- Purchase order number
- Price
- Start and end dates for the subscription period
- Vendor name
- Vendor ID
- Fund or budget code
- Invoice number
- Invoice date

www.niso.org/workrooms/core

CORE: Cost of Resource Exchange

CORE defines an XML schema to facilitate the exchange of financial information related to the acquisition of library resources between systems. The two systems may be within the same organization, e.g., an ILS and an ERMS, or from two different organizations, e.g., a subscription agent and a library.

"Future ERM systems will have to be different. No longer will it be sufficient for the ERM to be a system on the outside looking in -- a standalone system, separate from the e-resource supply chain and, in many cases, the library's other library automation tools. No longer will it be sufficient for the ERM to merely be the place where information generated elsewhere is recorded and external tasks are monitored. To be effective, ERM systems must become a part of the e-resource supply chain."

-Oliver Pesch

Resources

Anderson, Caryn (2006). Electronic Resource Usage Statistics: Defining a Complex Problem <http://web.simmons.edu/%7Eandersoc/erus/ERUSlandscape.doc>

Cost of Resource Exchange (CORE) Protocol <http://www.niso.org/publications/rp/RP-2010-10.pdf>

Electronic Resource Management: Report of the DLF ERM Initiative <http://www.diglib.org/pubs/dlf102/>

Geller, Marilyn (2006). The ERMI and Its Offspring. *Library Technology Reports 42*(2): 14-21.

Grogg, Jill E. (2008). Electronic Resource Management Systems in Practice. *Journal of Electronic Resources Librarianship 20*(2): 86-89.

Klimley, Susan (2010). We Can Work It Out: What an ERM Needs. *Against the Grain 22*(2): 18-20.

Klusendorf, Heather (2010). Measure for Measure: Libraries Want a More Effective ERM: Results from ERM Systems Usage Trends Survey. *Against the Grain 22*(2): 34-40.

Tijerina, Bonnie & Douglas King (2008). What is the Future of Electronic Resource Management Systems? *Journal of Electronic Resources Librarianship 20*(3):147-155.

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>