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2006-08-08

Implementing an Electronic Resource Management (ERM) System

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Original Publication Citation


Utah Library Association Annual Meeting (26)

BYU ScholarsArchive Citation

Howland, Jared L., "Implementing an Electronic Resource Management (ERM) System" (2006). *Faculty Publications*. 1281.


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Implementing an ERM


Jared Howland
 Brigham Young University
 May 18, 2006



Outline

- Overview of BYU
- Background of ERMs
- Who should/should not have an ERM
- Implementing an ERM


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BYU Overview

- Largely an undergraduate institution
 - 32,000 FTE
 - 10% are graduate students
- 300 electronic resources
- Sirsi Unicorn is our ILS provider
- Gold Rush is our ERM provider


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What is an ERM?

- ERM: Electronic Resource Management System


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What is an ERM?

- “Tools for managing the license agreements, related administrative information, and internal processes associated with collections of licensed electronic resources.”
 - Ellen Duranceau (June 2005) *Against the Grain*

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ERM Background

- Difficulty of managing electronic resources was widely recognized by 2001*
- Digital Library Federation (DLF) formed the Electronic Resource Management Initiative (ERMI) steering group in May 2002

* Jewell, Timothy D. (2001) *Selection and Presentation of Commercially Available Electronic Resources*. <http://www.clir.org/pubs/abstract/pub99abstf.html>

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ERM Background

- ERM Goals*
 - Describe architectures needed to manage electronic resources
 - Establish lists of elements and definitions
 - Write and publish XML schemas/DTDs
 - Promote best practices and standards for data exchange

* Jewell, Timothy D. (2006) *Envisioning the Future of ERMs*. NASIG Annual Conference 2006


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ERM Background

- Serials Solutions (ERMS)
- Ex Libris (Verde)
- Innovative Interfaces (Innovative's Electronic Resource Management)
- SirsiDynix (SirsiDynix ERM)
- North Carolina State University (E-matrix)
- Massachusetts Institute of Technology (VERA)
- Colorado Alliance (Gold Rush)
- Many others


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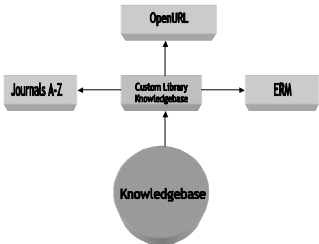
System Options

- Stand alone vs. Integrated
- Proprietary vs. Open source
- Locally hosted vs. Vendor hosted
- Consortium/branches vs. Single location
- As a package vs. ERM only


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System Options




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ERM Features

- ERMs help manage the following:
 - Trials
 - Acquiring
 - Customizing
 - Accessing
 - Evaluating


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ERM Features for Library Staff


- ERMs track the following:
 - Trial resources
 - Administrator modules
 - Number of simultaneous users
 - Costs over time
 - Resource access problems
 - Metadata for usage statistics
 - SUSHI will allow storage and tracking of statistics in the future
 - Renewal times and notices
 - Consortia agreements
 - License agreement details
 - Contact information


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| | <p style="text-align: right;"></p> <h2 style="margin: 0;">ERM Features for Library Patrons</h2> |
| | <ul style="list-style-type: none"> ■ Informs patrons of the following: <ul style="list-style-type: none"> – Access problems – Terms of use <hr style="width: 30%; margin-left: 0;"/> <p style="font-size: small; margin: 0;">Utah Library Association Annual Conference 2006 Jared Howland • Brigham Young University • May 18, 2006</p> |


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| | <p style="text-align: right;"></p> |
| | <ul style="list-style-type: none"> ■ Example from Gold Rush <hr style="width: 30%; margin-left: 0;"/> <p style="font-size: small; margin: 0;">Utah Library Association Annual Conference 2006 Jared Howland • Brigham Young University • May 18, 2006</p> |

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| | <p style="text-align: right;"></p> <h2 style="margin: 0;">You Might Need an ERM if...</h2> |
| | <ul style="list-style-type: none"> ■ Your ILS does not efficiently handle electronic resources <ul style="list-style-type: none"> – If this is the case, information will be found in disparate locations: <ul style="list-style-type: none"> ■ Local spreadsheet(s) ■ Local databases (for usage statistics, license terms, etc.) ■ Journals A-Z knowledgebase ■ Publisher lists ■ Mail/email ■ In your head <hr style="width: 30%; margin-left: 0;"/> <p style="font-size: small; margin: 0;">Utah Library Association Annual Conference 2006 Jared Howland • Brigham Young University • May 18, 2006</p> |

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| | <p style="text-align: right;"></p> <h2 style="margin: 0;">You Might Need an ERM if...</h2> |
| | <ul style="list-style-type: none"> ■ Other library departments are always asking for this locally held information: <ul style="list-style-type: none"> – Interlibrary loan office – Collection management decision makers – Course packs/university bookstore – Distance education librarian – Copyright office <hr style="width: 30%; margin-left: 0;"/> <p style="font-size: small; margin: 0;">Utah Library Association Annual Conference 2006 Jared Howland • Brigham Young University • May 18, 2006</p> |


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| | <p style="text-align: right;"></p> <h2 style="margin: 0;">You Might Need an ERM if...</h2> |
| | <ul style="list-style-type: none"> ■ You need to be able to communicate to patrons: <ul style="list-style-type: none"> – License terms <ul style="list-style-type: none"> ■ Do not download the entire database ■ Do not resell the information to your colleague at a neighboring university – Down time / access problems <hr style="width: 30%; margin-left: 0;"/> <p style="font-size: small; margin: 0;">Utah Library Association Annual Conference 2006 Jared Howland • Brigham Young University • May 18, 2006</p> |

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| | <p style="text-align: right;"></p> <h2 style="margin: 0;">You Might Need an ERM if...</h2> |
| | <ul style="list-style-type: none"> ■ You have discovered an electronic resource you have been paying for but never actually gained access ■ You have discovered a resource you never paid for but do have access <hr style="width: 30%; margin-left: 0;"/> <p style="font-size: small; margin: 0;">Utah Library Association Annual Conference 2006 Jared Howland • Brigham Young University • May 18, 2006</p> |

You Might Not Need an ERM if... 


- You are not plagued by the issues just discussed
- Handling electronic resources is a seamless process
 - For example, you are the single librarian that catalogs, makes collection decisions, troubleshoots the databases and runs interlibrary loan
- You only have a handful of electronic resources

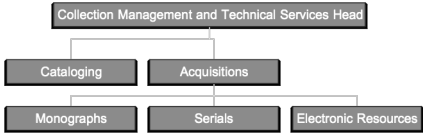
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Implementing an ERM 

- Establish implementation team
- Establish timeline
- Establish workflow
 - Short-run
 - Long-run

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Implementation Team 



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graph TD
    A[Collection Management and Technical Services Head] --> B[Cataloging]
    A --> C[Acquisitions]
    B --> D[Monographs]
    C --> E[Serials]
    C --> F[Electronic Resources]
  
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Implementation Team 


- Selected from wide range of areas
 - Cataloging
 - Serials
 - Administration
 - Electronic resources
- Library information systems
- Public services

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Lessons Learned from Team 


- Be over-inclusive at first
 - Interlibrary Loan
 - Copyright Office
 - Course Packs at University Bookstore
 - Monograph acquisitions
- Document decisions made and reasoning behind decisions
- Keep communication open
 - Email list
 - Wiki/blog


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Timeline 


- Depends on the following variables:
 - Type of system
 - Public interface vs. staff only
 - Current state of electronic resources
 - Information about each resource readily available vs. information hard to find or missing
 - What else is being implemented simultaneously


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| | <h2 style="margin: 0;">Timeline</h2> <ul style="list-style-type: none"> ■ Implemented system in following order: <ul style="list-style-type: none"> – Journals A-Z – OpenURL – ERM ■ Journals A-Z and OpenURL completed before Fall semester ■ ERM being implemented over time <ul style="list-style-type: none"> – Bulk is complete but is an ongoing process |
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| | <h2 style="margin: 0;">Lessons from Timeline</h2> <ul style="list-style-type: none"> ■ Would implement ERM first <ul style="list-style-type: none"> – This would help ensure thoroughness and accurateness of coverage in OpenURL and Journals A-Z ■ Would have finished work during a busy time and gone live during a slow time <ul style="list-style-type: none"> – More time to work out kinks – Glitches would effect smaller population |
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| | <h2 style="margin: 0;">Short-run Workflow</h2> <ul style="list-style-type: none"> ■ Use invoices as a time to record what we have <ul style="list-style-type: none"> – Copies of invoices sent to Electronic Resources – Information is recorded in ERM and additional information is pulled from existing files and verified |
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| | <h2 style="margin: 0;">Long-run Workflow</h2> <ul style="list-style-type: none"> ■ Still being worked out at BYU ■ Generally, we are heading in the following direction: <ul style="list-style-type: none"> – The first person that comes in contact with information about an electronic resource is the one that records it in an ERM – Distributed workload for electronic resources <ul style="list-style-type: none"> ■ Too big to be handled by any one person |
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| | <h2 style="margin: 0;">Lessons from Workflow</h2> <ul style="list-style-type: none"> ■ Set standards for way information is recorded in an ERM ■ Set standards for a minimum ERM record (equivalent to a minimum cataloging record) ■ Establish workflows early in process ■ Be flexible and creative with workflows |
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| | <h2 style="margin: 0;">Final Lessons</h2> <ul style="list-style-type: none"> ■ Implementing an ERM has helped us to better manage our electronic resources ■ Through better management, we are beginning to be less focused on format issues and more focused on ways of streamlining workflows and improving services to our patrons |
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Questions



- Questions?

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