Implementing an Electronic Resource Management (ERM) System

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Howland, Jared L., "Implementing an Electronic Resource Management (ERM) System" (2006). Faculty Publications. 1281.
https://scholarsarchive.byu.edu/facpub/1281

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Implementing an ERM

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May 18, 2006

Outline

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

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

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

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


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ERM Background

- **ERMI 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


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

ERM Features

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

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
ERM Features for Library Patrons

- Informs patrons of the following:
  - Access problems
  - Terms of use

Example from Gold Rush

You Might Need an ERM if...

- Your ILS does not efficiently handle electronic resources
  - If this is the case, information will be found in disparate locations:
    - Local spreadsheet(s)
    - Local databases (for usage statistics, license terms, etc.)
    - Journals A-Z knowledgebase
    - Publisher lists
    - Mail/email
    - In your head

You Might Need an ERM if...

- Other library departments are always asking for this locally held information:
  - Interlibrary loan office
  - Collection management decision makers
  - Course packs/university bookstore
  - Distance education librarian
  - Copyright office

You Might Need an ERM if...

- You need to be able to communicate to patrons:
  - License terms
    - Do not download the entire database
    - Do not resell the information to your colleague at a neighboring university
  - Down time / access problems

You Might Need an ERM if...

- 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
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

Implementing an ERM

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

Implementation Team

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

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

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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Timeline
- Implemented system in following order:
  - Journals A-Z
  - OpenURL
  - ERM
- Journals A-Z and OpenURL completed before Fall semester
- ERM being implemented over time
  - Bulk is complete but is an ongoing process

Lessons from Timeline
- Would implement ERM first
  - 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
  - More time to work out kinks
  - Glitches would effect smaller population

Short-run Workflow
- Use invoices as a time to record what we have
  - Copies of invoices sent to Electronic Resources
  - Information is recorded in ERM and additional information is pulled from existing files and verified

Long-run Workflow
- Still being worked out at BYU
- Generally, we are heading in the following direction:
  - 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
  - Too big to be handled by any one person

Lessons from Workflow
- 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

Final Lessons
- 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
Questions

● Questions?

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