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## Implementing an Electronic Resource Management (ERM) System

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# Implementing an ERM

Jared Howland

Brigham Young University

May 18, 2006

# Outline

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

# BYU Overview

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- 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?

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- ERM: Electronic Resource Management System

# 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

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- 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/pub99abst.html>

# ERM Background

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- 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



# ERM Background

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- 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

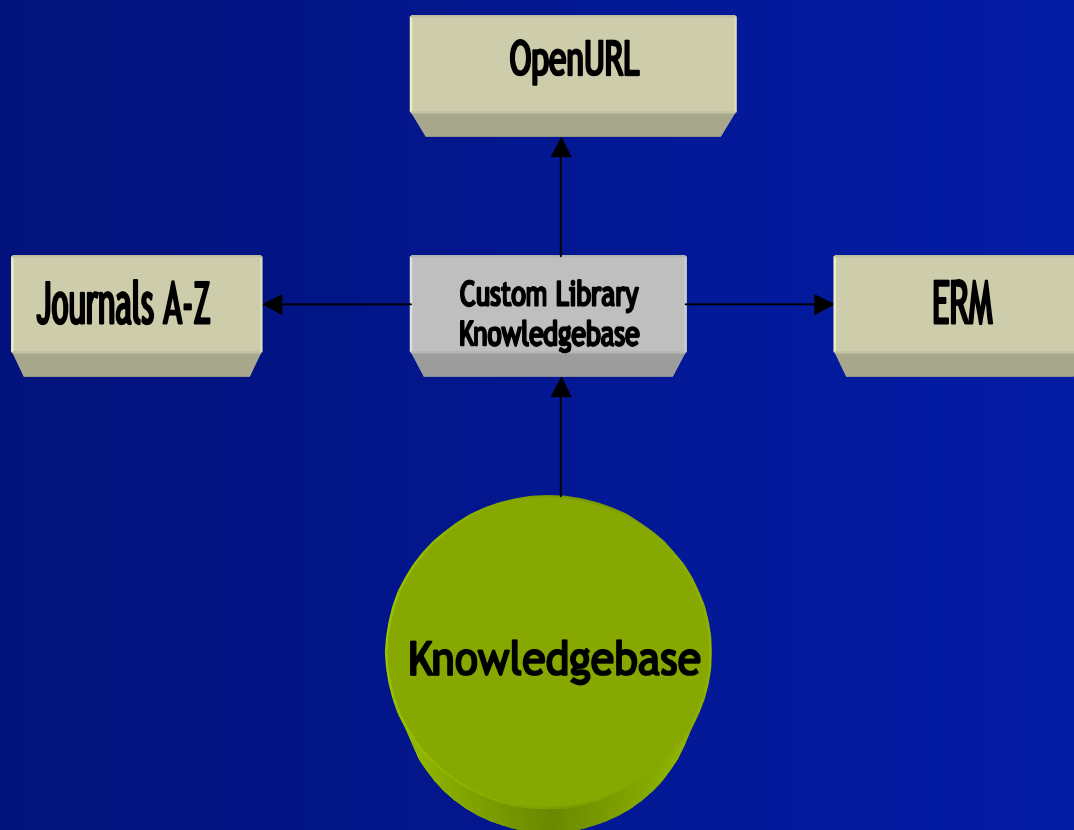
# System Options

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

# System Options

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# ERM Features

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

# ERM Features for Library Staff

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- 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

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

- Example from Gold Rush

# You Might Need an ERM if...

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- 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...

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- 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...

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- 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...

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- 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...

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- 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

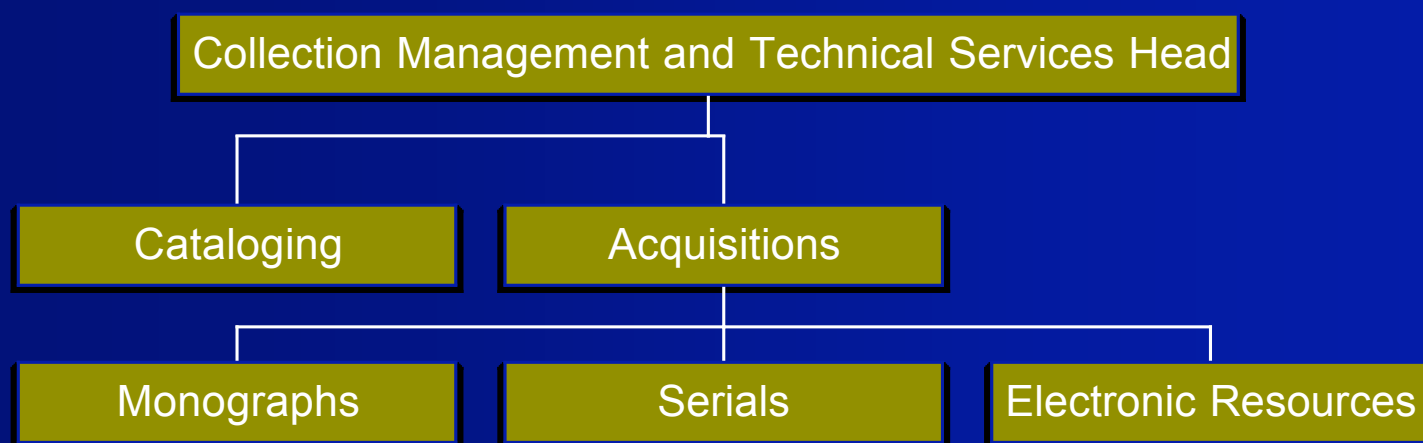
# Implementing an ERM

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

# Implementation Team

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# Implementation Team

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

# Lessons Learned from Team

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- 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

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- 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

# Timeline

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- 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

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- 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

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- 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

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- 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

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- 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

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- 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

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- Questions?
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