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Implementing an Electronic Resource Management (ERM) System

Jared L. Howland
jared_howland@byu.edu

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Implementing an ERM

Jared Howland
Brigham Young University
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Outline
- Overview of BYU
- Background of ERM
- 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?
- 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
- 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

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


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

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

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
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?

Jared Howland
Brigham Young University
Harold B. Lee Library
jared_howland@byu.edu