

Managing Online Subscriptions with ERM

WVLA

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The ERM Team

- **Jingping Zhang** — University Librarian/ Director of Library Operations
 - Coordinates the project. Tests system.
 - Troubleshoots problems and issues
- **Paris Webb** — Digital Resources & Systems Support Librarian
 - Performs coverage loads
 - Reviews license details
 - Input data
- **Lisa Hughes** — Assistant Accountant
 - Input data
 - Financial and order information
 - Links other records with resource record
- **Christine Lewis** — Technical Services Team Leader & Acquisitions Librarian
 - Contact with vendors and aggregators
 - Update information
 - Input data

Electronic Resource Management Capabilities

- Manage license and purchasing details
- Manage payment details
- Manage subscription details
- Manage relationship between aggregators
- Manage alerts and email reminders about date sensitive activity
- Manage level of display --- what can be viewed by staff and the public
- Manage batch loading for current coverage information and new holdings

Considerations

- Overwhelming transition to online content from print
- Refocusing – from acquiring collections to accessibility of collections
- Refocusing – from owning resources to sharing resources
- Trying to be more user centered
 - In library user (library staff)
 - Students, faculty, staff, colleagues, etc.

Without a centralized ERM

- Prior to implementation we were maintaining e-resource information in a haphazard way
 - Some information in an Access Database
 - Some in file folders or desks
 - Frequent emails.... “Who has the password?” “Who is the contact person?” “When does the license expire?”



Getting Started

- Form our ERM team
 - This project would be in addition to regular duties
- Information from conferences
 - ACRL
 - Charleston Conference
- Contact with other institutions
 - The Ohio State University
 - Wright State University
 - Emails and phone calls

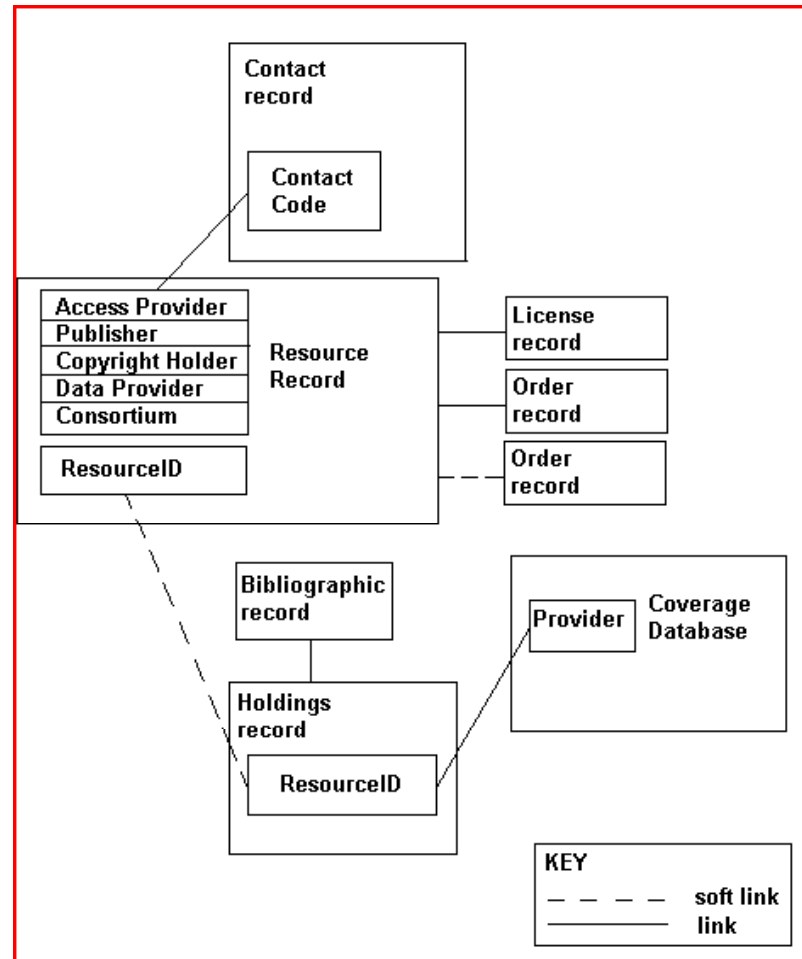
Early Decisions

- What resources should we add to ERM?
 - Databases
 - Paid subscriptions
 - E-journals
 - E-books
 - Online resources that have usage data available
 - Open access resources

Types of Records in the ERM

- Resource record
 - Resource name, ID, and administrative information
 - Resource ID is very important because will help to link to other records in the system such as bibliographic record
- Contact record
 - Names, phone/fax number, email, website url
- Order record
- License record

Records Overview



Implementation

Resource Record

- Resource name
- Publisher
- Data Provider
- Format
- Coverage
- Access Provider
- Administration
- User name/passwords
- Ticklers/reminders
- Notes for public view
- Incident logs

Implementation

Contact Record

- Vendor name (access, consortium, data provider, etc.)
- Technical support name
- Emails
- Websites

Implementation

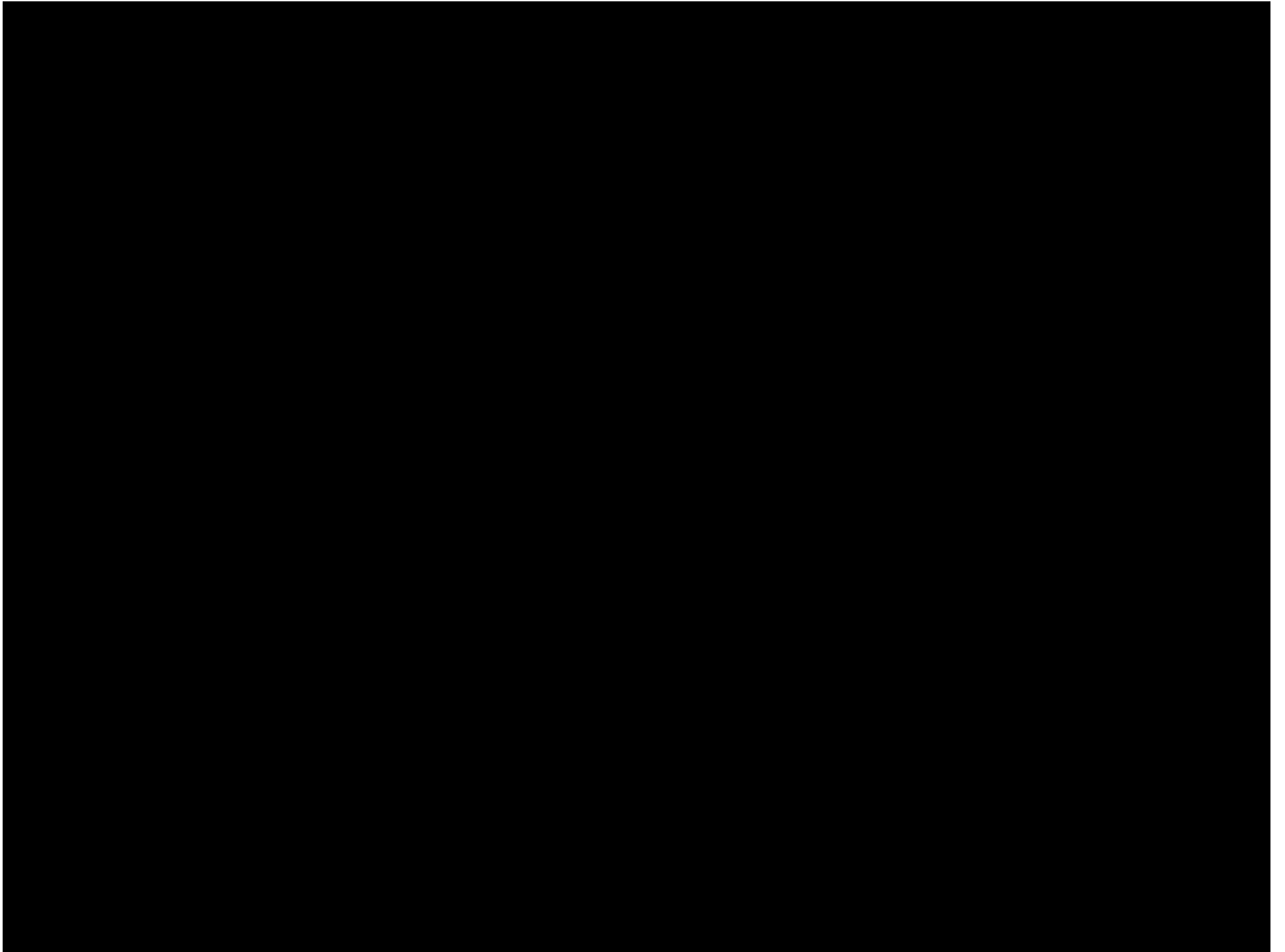
Order Record

- Connection of records:
 - * resource record to bibliographic record
- Link between electronic resource records and acquisitions
- Payment trail provided
- Vendor information

Implementation

License Records

- Effective dates
- ILL details
- Course pack details
- Authorized users
- Confidentiality
- Remote access
- Terms of use for staff and patrons
- Authentication
- Site authentication



Impact on Other Systems

Life Cycle of Electronic Resources

- Consideration (what does this resource have, is there overlap)
- Trial (contact information, IP ranges, tech support, dates)
- Negotiation (pricing from similar products may be available for comparison)
- License (terms of use)
- Procurement (financial aspects)
- Active use and monitoring (usage, support, interruptions in service)
- Renewals/De-selection (tickler reminders for renewals)

Breeding, Marshall. "Helping You Buy Electronic Resource Management Systems." Computers in Libraries 28.7 (July 2008): 6-96. Academic Search Premier. EBSCO

Impact on other systems at MU

- ILL
 - Terms of use are available for review by ILL staff
 - Terms of use can also be available for public view
 - Format description is readily available(sometimes our borrowers specify color PDF only)
- Acquisitions
 - Reminders for renewals
 - Pricing information is available
- Collection Development
 - Usage statistics can be imported and cost per use can be calculated
 - Contact information and login information is centralized and easy to locate
 - Changes to access can be noted
 - Title overlap can be detected

Advantages & Disadvantages

- Information about resources is in one place
- Flexibility in terms of who can view what ERM information
- ERM systems can link to other ILS modules
- License details can be viewed
- Possibly the most efficient way to handle the growing online collection
- Requires a significant time commitment
 - Decision making prior to setup
 - Can interrupt or alter established workflows
 - Entry of initial information
 - Regular updates

Our Next Steps

- Coverage loads
- License information entry
- Display selected information in OPAC
- Activate the usage report feature
- Use the ERM to display trial information

Questions?

