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

- **Lisa Hughes** — Assistant Accountant
  - Input data
  - Financial and order information
  - Links other records with resource record

- **Paris Webb** — Digital Resources & Systems Support Librarian
  - Performs coverage loads
  - Reviews license details
  - Input data

- **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
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)

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?