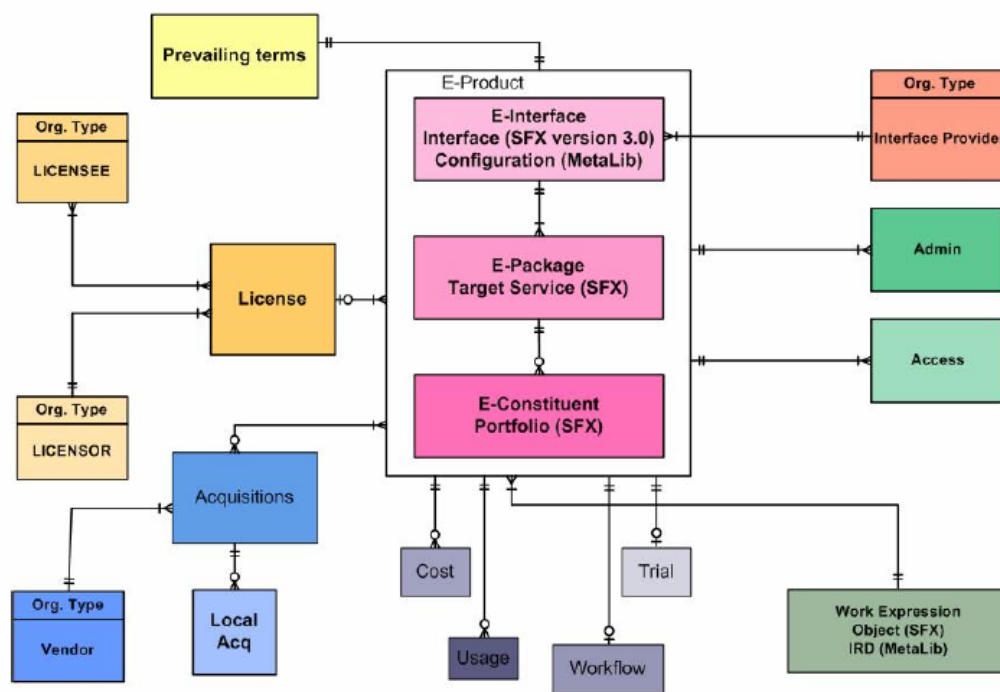


## E-Resources Management 'Verde' Entity Relationship Model



### I: Information about e-Interface

The screenshot shows the Verde web application interface. The top navigation bar includes "Verde Tasks", "KB Manager", "KB Tools", and "Admin". The user is logged in as "siam" and is viewing the "LOCUS - SIAM's Online Journal Archive". The "Managing" dropdown is set to "e-Products". The main content area displays the "Acquisition Records List" with a table of records. A red arrow points to the "Actions" column header.

| Start subscription | End subscription | ACQ Number | Purchase Order # | Status | Actions |
|--------------------|------------------|------------|------------------|--------|---------|
|                    |                  |            |                  |        |         |

The **Work record** for Journal of the Society for Industrial and Applied Mathematics

The screenshot shows the Verde KB Manager interface. At the top, there are navigation tabs for 'Verde Tasks', 'KB Manager', 'KB Tools', and 'Admin'. The main header area includes the Verde logo and the text 'Ex Libris U'. Below this, there are breadcrumb links: 'siam' > 'LOCUS - SIAM's Onl...' > 'Journal of the Soc...'. The main content area is titled 'Journal of the Society for Industrial and Applied Mathematics' and includes a 'Managing:' dropdown set to 'e-Products'. There are buttons for 'New Work', 'New Search', 'View Basket', and 'View I'. Below the title, there is a summary section with 'Code: INST1', 'SFX ID: 110975500577317', and 'MetaLib ID:'. The 'Created by:' field shows 'Administrator 16-Aug-2005'. The main area is divided into two panels: 'Select fields:' and 'Field details:'. The 'Select fields:' panel lists various fields with checkboxes, including LCCN, CODEN, eISSN, Author, Corporate Author, Abbreviated Title, Display Title, Imprint, Update frequency, Category, Time Span, Coverage Note, Description, Copyright, e-Product Type, e-Product Format, Language, Continues, Continued by, Local 1-9, and MetaLib ID. The 'Field details:' panel shows a table with columns for 'Field', 'Details', and 'Action'. The table contains the following data:

| Field          | Details   | Action |
|----------------|---|--------|
| ISSN           | 0368-4245   | [edit] |
| Title          | Journal of the Society for Industrial and Applied Mathematics | [edit] |
| Imprint        | Society for Industrial and Applied Mathematics. Philadelphia, | [edit] |
| Category       | Engineering Fluid Engineering                                 | [edit] |
| e-Product Type | JOURNAL   | [edit] |
| Continued by   | SIAM journal on applied mathematics                           | [edit] |
| SFX            | 110975500577317   | [edit] |

The Report for an e-Product: Shows available data fields

The screenshot shows the Verde system interface for configuring a report. At the top, there is a navigation bar with 'Verde Tasks', 'KB Manager', 'KB Tools', and 'Admin'. The 'Report' tool is selected. The left sidebar shows a tree view with 'E-Product' and 'General report of e-Product'. The main area is divided into 'Task properties' and 'Delivery properties'. The 'Task properties' section includes filters on active records, include constituents, and various selection criteria for e-Product status, selection status, activation dates, availability, sponsoring library, package type, and acquisition status. The 'Acquisition status' dropdown is highlighted with a red arrow. The 'Delivery properties' section includes file format (CSV) and email fields.

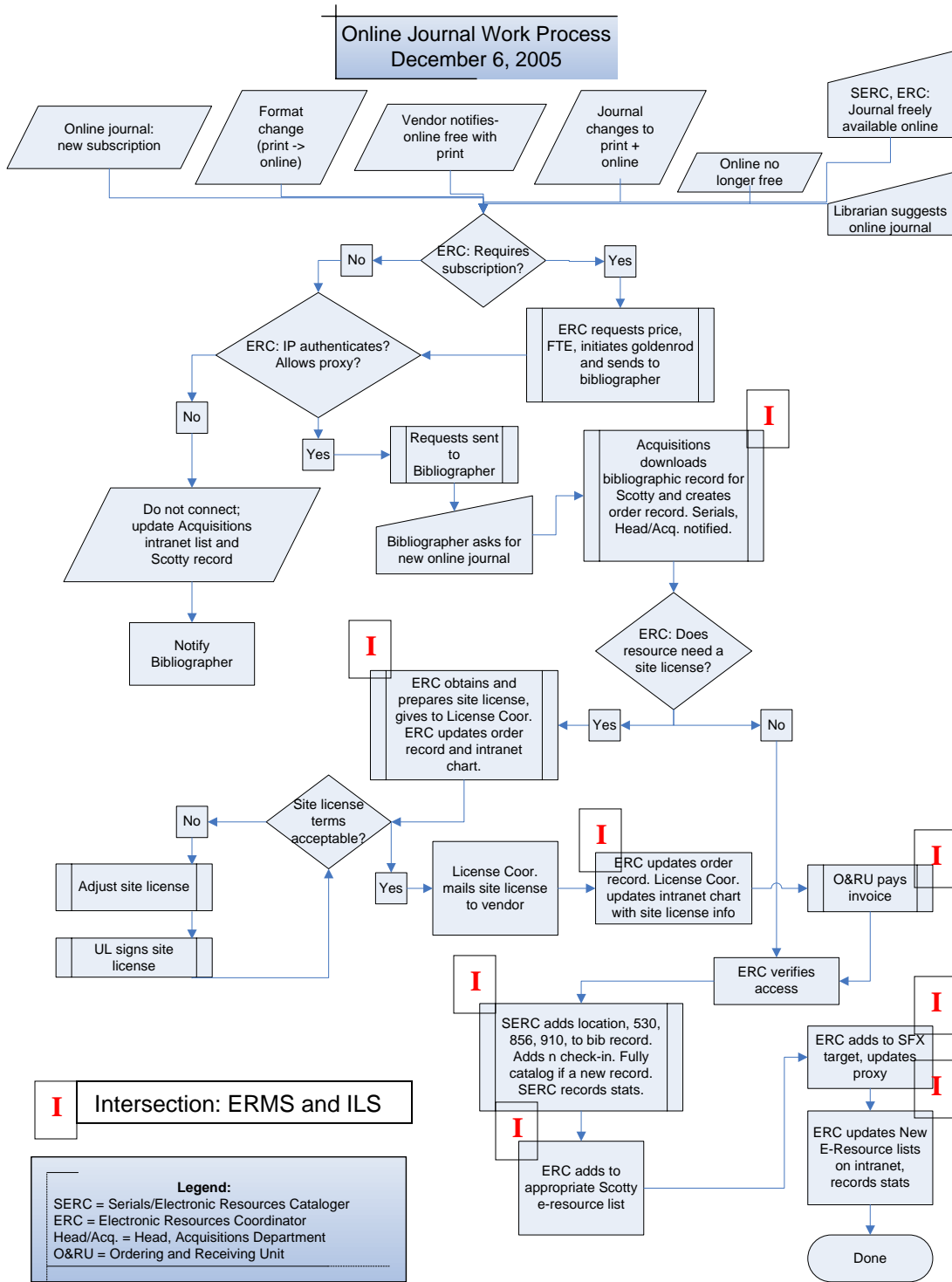
|                          |   |  |  |
|--------------------------|---|--|--|
| Order date:              | = | <input type="text"/>   |  |
| <b>License</b>           |   |  |  |
| License type:            |   | Regular<br>Prevailing<br>Supplemental  |  |
| License status:          |   | New<br>In negotiation<br>Under review  |  |
| License method:          |   | Negotiated<br>Click through<br>Online  |  |
| Start date:              | = | <input type="text"/>   |  |
| End date:                | = | <input type="text"/>   |  |
| Execution date:          | = | <input type="text"/>   |  |
| Licensee:                |   | <input type="text"/>   |  |
| Licensor:                |   | <input type="text"/>   |  |
| Perpetual access rights: |   | Yes<br>No<br>Undetermined  |  |
| Archiving rights:        |   | Yes<br>No<br>Undetermined  |  |
| Remote access:           |   | Yes<br>No  |  |
| Fair use clause:         |   | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Ignore |  |

**Consortial Resource, Order Record:**

|  |   |                  |                   |                   |                                |         |                 |                  |                   |                   |
|--|---|------------------|-------------------|-------------------|--------------------------------|---------|-----------------|------------------|-------------------|-------------------|
| <b>b30856887</b>   |   |                  |                   |                   |                                |         |                 |                  |                   |                   |
| TITLE  | Journal of the Society for Industrial and Applied Mathematics |                  |                   |                   |                                |         |                 |                  |                   |                   |
| CALL #   | QA1 .S62  |                  |                   |                   |                                |         |                 |                  |                   |                   |
| IMPRINT  | Philadelphia, Society for Industrial and Applied Mathematics  |                  |                   |                   |                                |         |                 |                  |                   |                   |
| ISN/MUSIC #  | 0368-4245   |                  |                   |                   |                                |         |                 |                  |                   |                   |
| LOCATIONS  | n , s   |                  |                   |                   |                                |         |                 |                  |                   |                   |
| <table border="1"> <tr> <td>Summary</td> <td>Record o745546x</td> <td>Receive o745546x</td> <td>Payments o745546x</td> <td>0 Bib-Level Holds</td> </tr> </table> |   |                  |                   |                   |                                | Summary | Record o745546x | Receive o745546x | Payments o745546x | 0 Bib-Level Holds |
| Summary  | Record o745546x   | Receive o745546x | Payments o745546x | 0 Bib-Level Holds |                                |         |                 |                  |                   |                   |
| <input type="checkbox"/> Queue P.O. <a href="#">View Finances</a>  |   |                  |                   |                   |                                |         |                 |                  |                   |                   |
| <b>o745546x</b> Last Updated: 09-15-2005    Created: 04-26-1999    Revisions: 8  |   |                  |                   |                   |                                |         |                 |                  |                   |                   |
| ACQ TYPE   | 1 SUBS-PT   | E PRICE          | \$0.00            | RLOC              | w WEB                          |         |                 |                  |                   |                   |
| LOCATION   | n Internet  | FORM             | f ELEC. FILE      | BLOC              | a ACCOUNTS                     |         |                 |                  |                   |                   |
| CDATE  | - -   | FUND             | cdlse CDL Serials | STATUS            | f SERIAL NO ENC                |         |                 |                  |                   |                   |
| CLAIM  | n NO CLAIMS   | ODATE            | 04-26-1999        | TLOC              | - ---                          |         |                 |                  |                   |                   |
| COPIES   | 1   | ORD NOTE         | - -               | VENDOR            | cdl California Digital Library |         |                 |                  |                   |                   |
| INPUTTER   | o JO  | ORD TYPE         | s SUBSCRIPTION    | LANG              | eng English                    |         |                 |                  |                   |                   |
| TAX  | n NOT TAXABLE   | REACTION         | - ---             | COUNTRY           | xxu U.S. (state not known)     |         |                 |                  |                   |                   |
| COLL DEV   | 1 DR  | RDATE            | - -               | VOLUMES           | 0                              |         |                 |                  |                   |                   |
| RECEIVING  | - -   |                  |                   |                   |                                |         |                 |                  |                   |                   |
| <p><b>NOTE</b>            JSTOR: for payments, see PO#740508x<br/> <b>SPEC NOTE</b>    MATHEMATICS(1)</p>  |   |                  |                   |                   |                                |         |                 |                  |                   |                   |

**Local Subscription, Order Record**

|  |   |                  |                         |                   |                            |               |                          |                  |                   |                   |
|--|---|------------------|-------------------------|-------------------|----------------------------|---------------|--------------------------|------------------|-------------------|-------------------|
| <b>b21607588</b>   |   |                  |                         |                   |                            |               |                          |                  |                   |                   |
| TITLE  | Journal of applied social psychology.         |                  |                         |                   |                            |               |                          |                  |                   |                   |
| CALL #   | HM251.A1 J64                                  |                  |                         |                   |                            |               |                          |                  |                   |                   |
| IMPRINT  | Silver Spring, Md. [etc.] V.H. Winston [etc.] |                  |                         |                   |                            |               |                          |                  |                   |                   |
| ISN/MUSIC #  | 0021-9029                                     |                  |                         |                   |                            |               |                          |                  |                   |                   |
| LOCATIONS  | n , r   |                  |                         |                   |                            |               |                          |                  |                   |                   |
| <table border="1"> <tr> <td>Summary</td> <td>Record o2551640</td> <td>Receive o2551640</td> <td>Payments o2551640</td> <td>0 Bib-Level Holds</td> </tr> </table>   |   |                  |                         |                   |                            | Summary       | Record o2551640          | Receive o2551640 | Payments o2551640 | 0 Bib-Level Holds |
| Summary  | Record o2551640                               | Receive o2551640 | Payments o2551640       | 0 Bib-Level Holds |                            |               |                          |                  |                   |                   |
| <input type="checkbox"/> Queue P.O. <a href="#">View Finances</a>  |   |                  |                         |                   |                            |               |                          |                  |                   |                   |
| <b>o2551640</b> Last Updated: 12-07-2005    Created: 09-22-1986    Revisions: 68   |   |                  |                         |                   |                            |               |                          |                  |                   |                   |
| ACQ TYPE   | p PURCHASE                                    | E PRICE          | \$0.00                  | RLOC              | s RIV SERIAL               |               |                          |                  |                   |                   |
| LOCATION   | rstk Rivera                                   | FORM             | s SERIAL                | BLOC              | a ACCOUNTS                 |               |                          |                  |                   |                   |
| CDATE  | - -   | FUND             | glser Gen Lib Ser/Renew | STATUS            | f SERIAL NO ENC            |               |                          |                  |                   |                   |
| CLAIM  | n NO CLAIMS                                   | ODATE            | - -                     | TLOC              |                            |               |                          |                  |                   |                   |
| COPIES   | 1   | ORD NOTE         | - -                     | VENDOR            | ebSCO EbSCO                |               |                          |                  |                   |                   |
| INPUTTER   |   | ORD TYPE         | s SUBSCRIPTION          | LANG              | eng English                |               |                          |                  |                   |                   |
| TAX  | n NOT TAXABLE                                 | REACTION         |                         | COUNTRY           | xxu U.S. (state not known) |               |                          |                  |                   |                   |
| COLL DEV   | 3 JBR   | RDATE            | - -                     | VOLUMES           | 1                          |               |                          |                  |                   |                   |
| RECEIVING  | - -   |                  |                         |                   |                            |               |                          |                  |                   |                   |
| <p><b>NOTE</b>            Online included free with print. No site license required per vendor email 9/7/2005, meh.<br/> <b>NOTE</b>            Subscriber No. : #0037J<br/> <b>SPEC NOTE</b>    PSYCHOLOGY(1)<br/> <b>SPEC NOTE</b>    SOCIOLOGY(1)<br/> <b>VEN ID</b>        LA7721100AA469707004<br/> <b>VEN ID</b>        LA7721111AA468744511</p> |   |                  |                         |                   |                            |               |                          |                  |                   |                   |
| <b>PAID</b>  | <b>DATE</b>                                   | <b>INVD</b>      | <b>INV#</b>             | <b>AMT</b>        | <b>VOUCHER</b>             | <b>COPIES</b> | <b>NOTE</b>              |                  |                   |                   |
|  | 12-07-2005                                    | 10-28-2005       | 0271862                 | \$962.48          | 958770                     | 001           | 36(01/06)-36(12/06);Y178 |                  |                   |                   |



## Checklist: Preparing for an ERMS

1. What is the ERMS capable of?
  - a. Manage resource lifecycle
    - i. All info in one place
  - b. Facilitate collection development
    - i. Cost analysis
  - c. Local and consortial status
  - d. Automate upkeep
  - e. Record resource relationships
  - f. Manage license
  - g. Reports
  - h. Other?
2. What does your institution hope the ERMS will do?
  - a. Populate local and consortial data
  - b. Allow one-click investigation
  - c. Live bridge to ILS
  - d. Show who owns what
  - e. Track desiderata
  - f. Show consortial status
  - g. Provide new resource alerts
  - h. Allow multi-year budget data
  - i. Manage statistics, usage and vendor-supplied
  - j. Renewal alerts
3. Coordinating with Acquisitions, Cataloging and Collection Development: Needs assessment and functionality analysis
  - a. Descriptive: bibliographic information
  - b. Licensing: authorized users and uses, restrictions on downloads, courseware, e-reserves, searches.
  - c. Financial: price, inflation rate, funds affected, cancellation allowances.
  - d. Administrative: administrative site location, account, user name, password, vendor and other contacts
  - e. Usage: vendor usage statistics, institution usage statistics
  - f. Status: active, desiderata, inactive, rejected
  - g. Consortial status
  - h. Bridges to ILS, OpenURL, metasearching tools': connections and status
  - i. Reporting
4. Coordinating with Acquisitions, Cataloging and Collection Development: fitting dreams into reality
  - a. Mapping tools and fields to fields.
  - b. Adjust functions/fields to local situation
  - c. Adjust work processes
  - d. Mechanism for communicating changes, updates and recording feedback from staff
  - e. Training
  - f. Discuss timelines
5. Organizing Data:
  - a. ILS Extractions
    - i. Subscriptions
    - ii. Vendor list
    - iii. Payment information
    - iv. Licensing
  - b. What is the consortium providing?
  - c. What local information is needed?
    - i. Collection Development vendor list
    - ii. Desiderata list

6. Plan Uploads
  - a. Prepare XML/DTD
  - b. If ERMS and ILS are dynamically linked, set up linking parameters
  - c. If not, plan batch loads, including staffing.
  - d. Massage local data if needed
7. Upload data
  - a. Provide mechanism for evaluation, feedback and improvement.
  - b. Establish workflow and responsibilities.
8. Testing
9. Release
10. De-Brief
  - a. Gather process observations
  - b. Assemble into final report; include recommendations that affect organizational change.



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- Raschke, Greg and Suzanne Weiner. "Clarity in the Mist." Library Journal part NetConnect Summer (2004): 4-6, 8.
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- Tull, Laura, Janet Crum, Trisha Davis, and C. Rockelle Strader. "Integrating and Streamlining Electronic Resources Workflows via Innovative's Electronic Resource Management." Serials Librarian 47:4 (2005): 103-124.