Against the Grain

April 2010

Re-Inventing the ERM: EBSCO Takes a New Approach to E-Resource Management with the Release of ERM Essentials

Oliver Pesch
EBSCO Information Services, opesch@ebsco.com

rent Integrated Library System to further automate the process, but for various reasons, we have had to resort to a mostly manual process, although using templates still saves time.

360 Resource Manager also provides for the organization of electronic resources into specific collections; since the **ISU** library is a member of multiple consortia, I have found it useful to use this feature to track some of our collective subscriptions. Notes created in **360 Resource Manager** can be attached to specific electronic resources, and we have used special notes to cross-reference cost data.

Information about contacts and alerts for renewals are also available in this tool. Menus enable library staff to customize data fields. Just as one example, we created a complex color coded filing system for our print records in 2009, and I was able to reference the same color codes in **360 Resource Manager** by using a custom data field. Cost data fields can be customized to accommodate the names of specific vendors. I have recently added forty-four vendor names that match the current designations in our Integrated Library System to improve cross-referencing of financial data.

Some other notable features of the **Serials Solutions 360 Suite** include the client center that I have briefly referenced earlier. The client center is entirely Web-hosted, so I can essentially log in and work from anywhere that I have an internet connection. The only drawback of the Web-hosted solution is that I must remind our patrons and other library staff that any changes or updates to the system usually take around one day to become visible. The client center also allows library staff to take full advantage of the fact that all the **360** tools are well-integrated into a common interface, e.g., a license created in **360 Resource Manager** can be attached to a resource in **360 Core** or vice versa. As we continue to populate our system with more data, we can also consider other characteristics of our electronic resources such as impact factor or perhaps eigenfactor. Titles necessary for accreditation could be omitted from cost-per-use calculations. There are many as-yet-unrealized opportunities for improving and streamlining our management of electronic resources using this system that I look forward to implementing in the future.

Overall, I am highly pleased that we chose **Serials Solutions 360 Resource Manager** as our ERM.

360 Core, **360 Link**, and **360 MARC Updates** are working very well and have greatly improved service for our patrons in most areas, except for the E-Journal Portal. This tool could be improved by providing greater customization features. **360 Counter** with **PivotLink** and some of the features of **360 Resource Manager** are not yet fully implemented, but our interlibrary loan staff have already started to use electronic resources to satisfy requests from other institutions — a first for our library. The overlap analysis tool has already saved our library thousands of dollars by identifying duplicate subscriptions and permitting more accurate assessment of potential acquisitions. Clerical work that once took many hours, if not days, can now be done in minutes. Our ERM is enabling us to succeed, not just survive, in the midst of a difficult economy that has reduced our library budget and personnel. 🌲

Re-Inventing the ERM: EBSCO Takes a New Approach to E-Resource Management with the Release of ERM Essentials

by **Oliver Pesch** (Chief Strategist, E-Resources; EBSCO Information Services) <opesch@ebsco.com>

It has been nearly six years since **ERMI** published their groundbreaking report that includes a detailed data dictionary and functional specifications for electronic resource Management (ERM) systems.[1] And it has been nearly six years since the first commercial ERM module was introduced to the market. Yet, librarians continue to struggle with the problem of managing their e-resources — including many who have implemented some form of ERM system. With so much time and energy spent, why is the problem largely unsolved?

This was the key question that we asked ourselves as we embarked on the development of **EBSCONET ERM Essentials**. We could have built an ERM system similar to others on the market, but we didn't want to come out with a product until we knew we could deliver something that actually makes a difference. **ERM Essentials** is the result of our investigation and development efforts — an ERM that we believe truly makes a difference to e-resource management.

In order to solve the outstanding problems, we first needed to understand what they were. The **ERMI** report provides a comprehensive list of data elements needed to describe and manage e-resources. The flowcharts and functional specifications were fairly clear regarding what an ERM system should do. From this perspective, **ERMI** had it right. When we surveyed our customers, other than an occasional comment that there are too many data elements, it became clear that the **ERMI** specifications were not the problem. Instead, we heard from our customers that some of their challenges were related to:
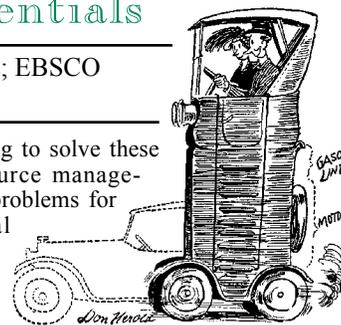
- The time it takes to gather and enter the data needed to effectively manage e-resources (information such as supply terms, license details, access and registration information).
- Managing their e-journal package renewals and ensuring they were adhering to the terms of their agreements.
- Keeping up with changes in their e-journals, such as titles moving from one publisher to the next (this also affects the renewals of e-packages).
- The time it takes to update holdings and related data to the various systems their patrons use for accessing the content they subscribe to.

When we examined the nature of **EBSCO's** role in the information supply chain, (we are the intermediary between publishers and libraries), we realized that we have been working to solve these e-resource management problems for several years. These solutions are already available in the form of enhancements we have made to our subscription services. For example:

- **EBSCO** captures license details and terms of use for thousands of publishers representing tens of thousands of e-journals. These details are coded to the related **ERMI** fields and are made available to our customers through our **EBSCONET** subscription management interface.
- **EBSCO** captures access and registration details that include URLs and instructions for registering journals, information on supported authentication types, information about archiving and perpetual access, and more. This information is also viewable through the **EBSCONET** interface.
- We added an "Order Activation" module that allows customers to track the workflow of registering their e-journals and titles in their e-journal packages.
- For many years, **EBSCO** has been keeping track of the individual titles that make up their e-journal packages, including those that are "access only" (titles that the publisher includes in a package in addition to the "subscribed" titles).
- A recent feature added to our **EBSCONET** subscription management application is E-Package Renewals. This is an application that was specially designed with input from publishers and librarians to handle the annual renewal process for e-journal packages — it enforces the terms of the contract and guides the librarian through the process quickly and accurately.
- Another service our role as part of the e-journal supply chain allows us to provide is the calculation of coverage entitlements using our knowledge of publisher access models, content availability, and a customer's order history.

With these features, **EBSCO** has done a great deal to simplify the process of managing a customer's e-journals. When it came to designing **ERM Essentials**, we realized that if we could build a system that would seamlessly integrate with other **EBSCO** systems and our Order History, we can solve a significant number of the challenges our customers were experiencing with managing their e-resources. This is the approach we took and one that has resulted in a simpler, yet very effective, ERM system.

With **ERM Essentials** as part of our supply chain, applications we offer do more than simply provide a place to store data and monitor tasks that happen elsewhere. When used in conjunction with **EBSCO's** other tools, we actually eliminate many time-consuming tasks. With **ERM Essentials**:

- **E-journal holdings are automatically populated** when ordered through **EBSCO**. This includes individual subscriptions, as well as titles within packages.

- **About 100 data elements are automatically populated** for those titles ordered through **EBSCO**. To put this savings in perspective, in a recent survey of our **ERM Essentials** customer accounts, on average we automatically populated over 100,000 data points.

- **Cost data and license history is retained** by automatically keeping a record of purchase history and the relevant terms. This allows librarians to perform historical cost-per-use analysis.

- **Integration with Order Activation** allows information on registration status to be automatically included in **ERM Essentials**.

- **Package renewal** and other tasks related to managing a customer's e-journals are handled in associated systems built for this purpose, thereby minimizing the effort. For example, the package renewal process is reduced to hours instead of days or weeks.

From what you have read so far it may seem that we built **ERM Essentials** only to work with e-resources bought through **EBSCO**. This is not the case. We realized that customers need one system where they manage all their e-resources; therefore, **ERM Essentials** was built to handle *all* e-resources and even though we provide a tremendous amount of time-savings for those e-resources purchased through **EBSCO**, our goal is that **ERM Essentials** is one of the most effective ERM systems on the market for managing the library's *complete* e-resource collection. Features include:

- **Support for entering licenses** so that data is managed at the optimal level (master license), and resources related to those licenses can be added with a click of the mouse.

- **Quick entry of cost data** related to titles and databases within the customer's collection.

- **Browsing and searching of the collection and orders (license data)**, providing library staff with an immediate way to look-up terms and conditions from a variety of contexts.

- **Reminders and tasks** can be set to help organize workflows or simply set as follow-ups for recurring tasks.

- **Upload features** to simplify capturing data from other systems.

- **Customization of what library staff see** means the administrator has control over which of the 300 data elements

he or she wants shown; these elements may be hidden, renamed and re-ordered as needed. Library staff members can each have their own login displaying only the features and functionality they are entitled to access.

- **Usage consolidation and cost-per-use analysis** features are coming soon in an add-on module.

There is much more to **ERM Essentials** than has been described in these few short paragraphs, but this provides a glimpse into the system we have built and how we will be continuing to enhance it over time.

EBSCO has been in the business of serving libraries for more than 60 years. Our success comes through the provision of services that make the lives of our customers easier. With **ERM Essentials** we not only saw the significant e-resource management challenges facing our customers, but we also recognized the opportunity presented by our unique position in the supply chain to provide a solution that can truly make a difference. **ERM Essentials** will save our customers hours and hours of time on data entry, which translates to thousands or tens of thousands of dollars in labor costs. And because so much data are automatically populated, it is a system that library staff can rely on to give the answers they need. By all accounts, **ERM Essentials** is the right product at the right time and one in which **EBSCO** will continue to invest. 🌲

Endnotes
1. **Electronic Resource Management Initiative**: *http://www.diglib.org/standards/dlf-erm02.htm.*
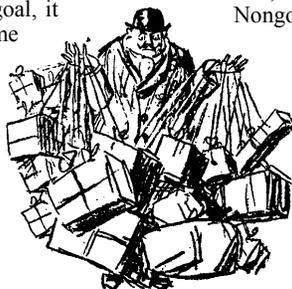
Measure for Measure: Librarians Want a More Effective ERM, Results from ERM Systems Usage Trends Survey

by **Heather Klusendorf** (Media Relations Coordinator, EBSCO Information Services) <Hklusendorf@ebsco.com>

According to a recent survey of *Against the Grain* readers, librarians seem pleased with the level of improvement that e-resource management (ERM) systems offer to daily e-resource workflow; however, there is still room for improvement. Librarians report needing help populating the ERM data and maintaining that data for accuracy. The majority of librarians surveyed want to be able to use one system, having the ERM integrate seamlessly with their integrated library system (ILS). Many librarians continue to supplement their ERMs with workaround such as spreadsheets and other Web-based tools. The goal, it seems, is to create an ERM that reduces the amount of time and systems for updating e-resource information.

Survey Methodology and Demographics

On Feb. 22, 2010, 1125 emails were sent to librarians in the *Against the Grain* readership, inviting them to participate in a study on ERM System Usage Trends. The questionnaire contained 18 questions about ERM use and was administered via a commercial, Web-based surveying application. In all, 269 individuals responded.

The main objectives of the study were to examine current librarian solutions for managing e-resources, identify satisfaction levels with ERM systems and applications, assess the relative importance of the core functionalities of ERM systems, explore attitudes toward ERM systems among librarians, and collect relevant librarian profile and demographic data.

Almost 88% of respondents indicated that they work in a college or university library setting. The remaining 12% are library professionals in Law, Medical/Hospital, Corporate/Business, Government, and Nongovernmental Organization/nonprofit settings.

Twenty-eight percent of the respondents said they were e-resources librarians. Almost 19% indicated they were acquisitions librarians, and 7.6% were serials librarians. Fourteen percent of the study participants who provided their job role reported they were either a library director, associate, or assistant director.

Perception of Need

As we suspected, e-resources are becoming more prevalent in libraries, with almost all librarians respond-