Meeting the E-Resources Challenge

Utilizing ERMS in Libraries

ALA Annual 2015

LITA/ALCTS Electronic Resources Management IG

June 26, 2015

* Dates are approximate

ERMS: A Brief History*

1994–2004: Homegrown systems

2004–2014: Vendor systems
(and Open Source)

2014–2024: Integrated service platforms

Image credits:
http://www.clker.com/clipart-shoe-box.html
http://www.thingiverse.com/thing:5541
http://www.cbrdigital.com/2013/02/05/hybrid-cloud-what-why-how.html

ERMI Guiding Principles

Print and e-resource management and access should be through an integrated environment

Information provided should be consistent, regardless of the path taken

Each data element should have a single point of maintenance

ERM systems should be sufficiently flexible to make it possible to easily add new or additional fields and data elements

ERMS: Key Players

Vendor Systems

- Alma (Ex Libris)
- Sierra (Innovative Interfaces)
- WorldShare Management Services (OCLC)
- Intota (ProQuest)
- Gold Rush (Colorado Alliance of Research Libraries)

Open Source Systems

- CUFTS (Simon Fraser University)
- CORAL (University of Notre Dame)
- ERMes (University of Wisconsin–La Crosse)
- OLE (Kuali)

* Adapted, with permission, from Appendix A of J. Emery (2007)

ERMS: Evaluation Form*

Functionality	Product
Integrates with existing ILS?	
Only enter basic data elements once?	
E-mail ticklers from one process to the next?	
Allows for multiple purchasing paradigms?	
Requires overhaul of current e-resource processing?	
Requires overhaul of current resource handling but has added benefits that make these changes worthwhile?	
Seamless end-user access from multiple starting points?	
Provides readily available messages about usage and outages to the end user?	
Based on DLF standards?	
Integrates usage-statistic information?	

Further Reading

Anderson, E. K. (2014). Electronic resource management systems and related products. *Library Technology Reports, 50*(3), 30–42.

Collins, M. & Grogg, J. E. (2011). Building a better ERMS. *Library Journal, 136*(4), 22–28.

Emery, J. (2007). The measured choice: The promise of electronic resource management tools, in *The E-Resources Management Handbook,* doi:10.1629/9552448_0_3.11.1

Jewell, T. D., Anderson, I., Chandler, A., Farb, S. E., Parker, I., Riggio, A., & Robertson, N. D. *Electronic Resource Management: Report of the DLF ERM Initiative* (Washington, DC: Digital Library Federation, 2004), http://old.diglib.org/pubs/dlf102/dlf102.htm

McQuillan, B. (2012). Gateway to improving ERM system deliverables: NISO ERM data standards and best practices review. *Serials Librarian, 62*(1–4), 112–124. doi:10.1080/0361526X.2012.652482

ALL the things?

An ERMS Cautionary Tale

June 27, 2015

Wendolyn Vermeer, M.L.I.S.
Cal Poly Pomona

#alaac15

Objectives

https://www.flickr.com/photos/vizzzual-dot-com/2655969483

Access available handouts at **ala.15.ala.org/sessions/handouts**.

Why ERMS?

Access available handouts at **ala.15.ala.org/sessions/handouts**.

Adapted from http://hyperboleandahalf.blogspot.com/

The Hope: an E-Resource Panacea

Centralize information about and processing of ER, including licenses, holdings, costs, usage statistics, and local notes

Access available handouts at **ala.15.ala.org/sessions/handouts**.

Our Hopes, Circa ’04

http://imgur.com/gallery/803u2cg

Access available handouts at **ala.15.ala.org/sessions/handouts**.

Current Grade

B– / B

…but it's not the ERM's fault.

Bib Access Services in ’04:

- Adequate staff support
- Homogeneous ILS components
- Few E-Resources to manage*

*yeah, it seemed like a lot at the time

ER Holdings in ’04:

- ~2,000 ejournals
- ~500 ebooks
- ~50 integrating resources/databases

So What Happened?

- Inadequate staff
- ER holdings explosion
- Tool proliferation

Additional Challenges

In brief:

- Two server migrations
- Campus web domain change
- Authentication change
- Discovery layer

ALL the things?

Adapted from http://hyperboleandahalf.blogspot.com/

Alex, what is "E-Resource Management Quixotism?"

CORRECT, for $2,000!

Access available handouts at **ala.15.ala.org/sessions/handouts**.

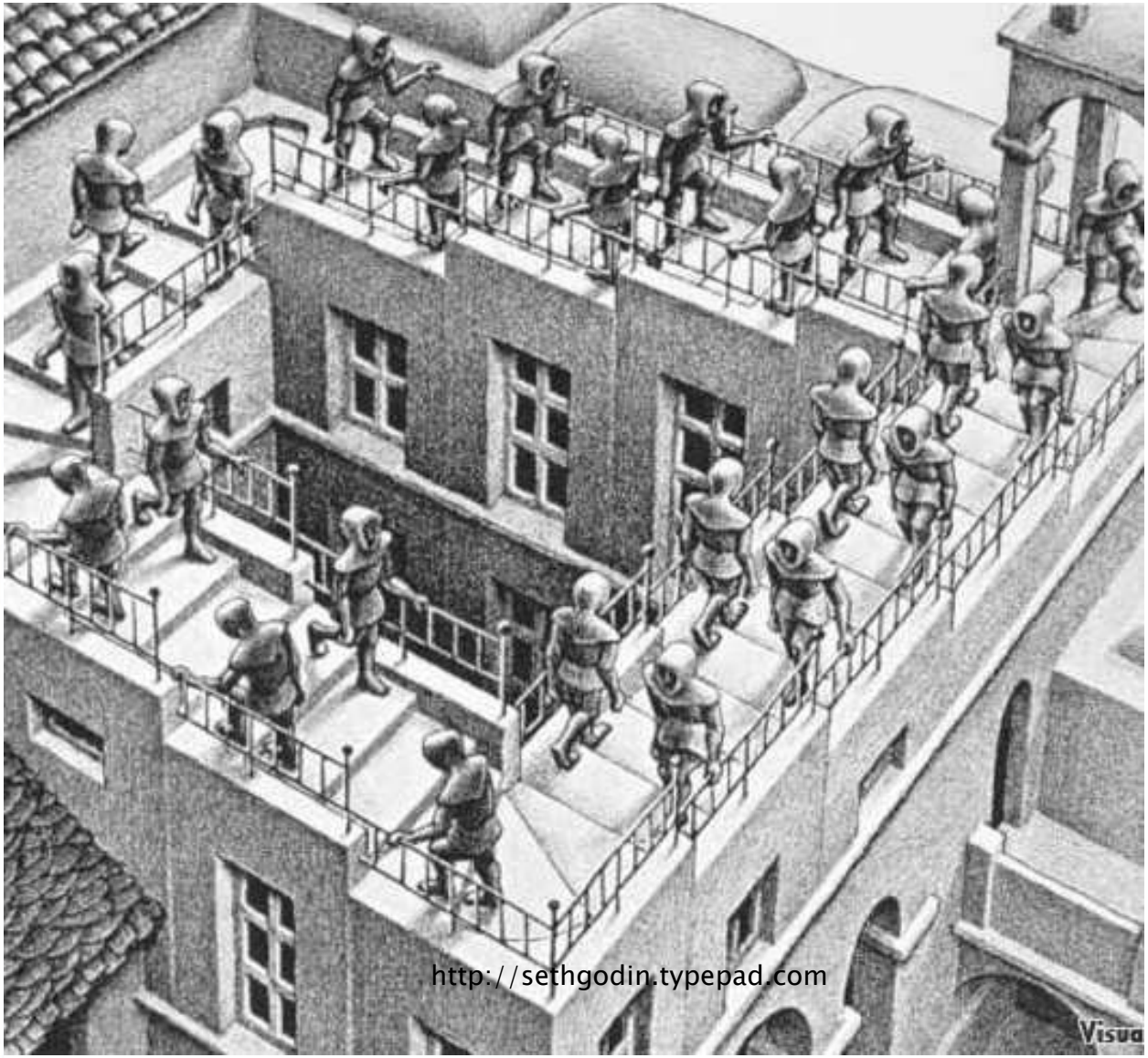
About III ERM…

- Symbolic links
- Interface
- Robust user community
- Robust vendor partnerships

What to Consider

User Needs

Access available handouts at **ala.15.ala.org/sessions/handouts**.



UX data helps

Google Analytics and Google Tag Manager
http://journal.code4lib.org/articles/10311

What to Consider

Currently Available Tools

Access available handouts at **ala.15.ala.org/sessions/handouts**.

Avoid silos where possible

Image by Michael Trolove

http://tinyurl.com/njohjm2

What to Consider

Cataloging Treatment

Access available handouts at **ala.15.ala.org/sessions/handouts**.

Format entwined MARC?

https://commons.wikimedia.org/wiki/File:Monkey_Fist_HowTo.jpg

What to Consider

Sustainable?
Scalable?

Access available handouts at **ala.15.ala.org/sessions/handouts**.

http://briasimpson.com/how-scalable-is-your-business/

…and CHANGE!

http://briasimpson.com/how-scalable-is-your-business/

Thank You!

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edanathered

MEETING THE E-RESOURCES CHALLENGE: UTILIZING ERMS IN LIBRARIES

Smith College Libraries and the journey to CORAL

Rose Reynolds
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Smith College
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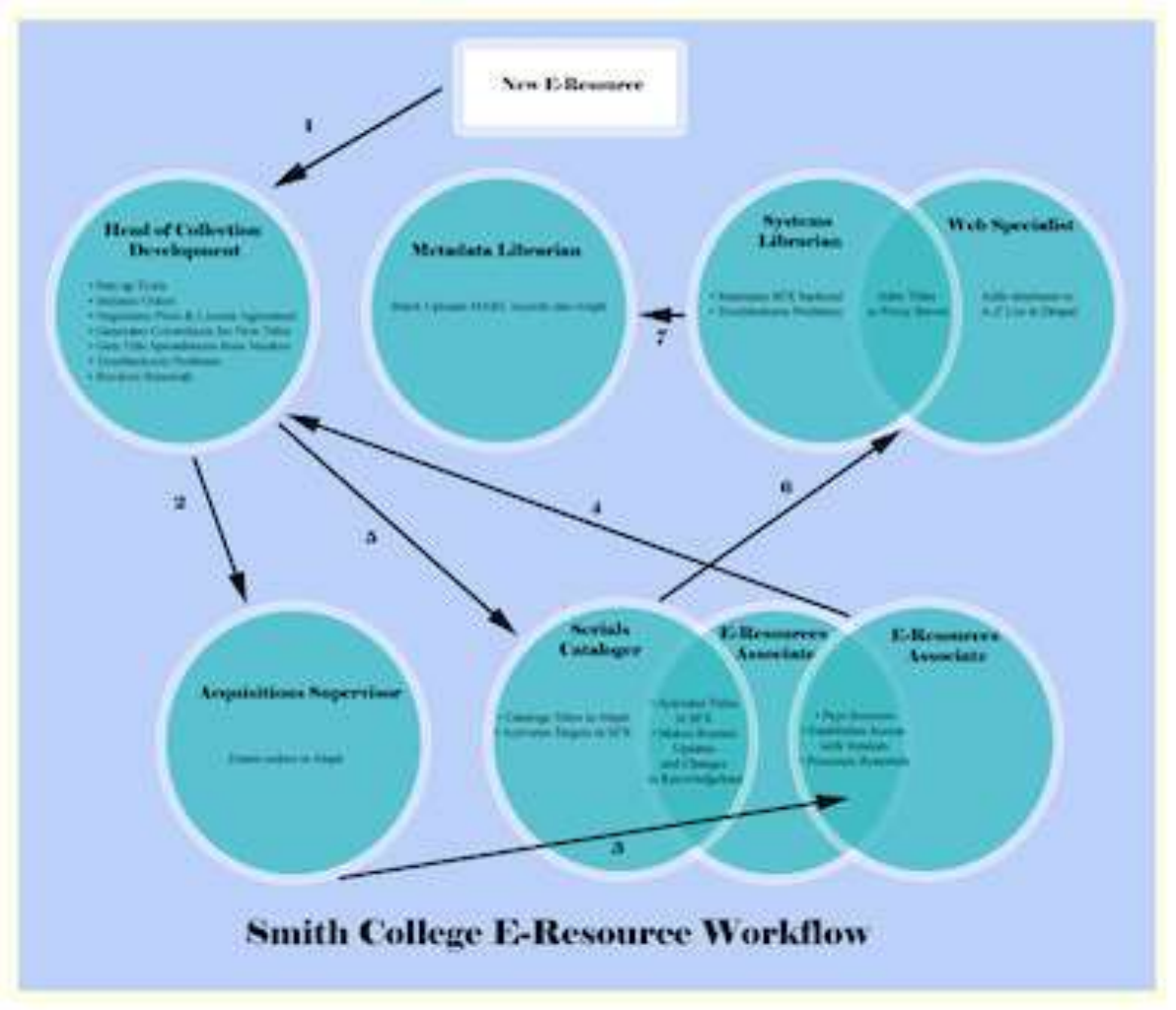
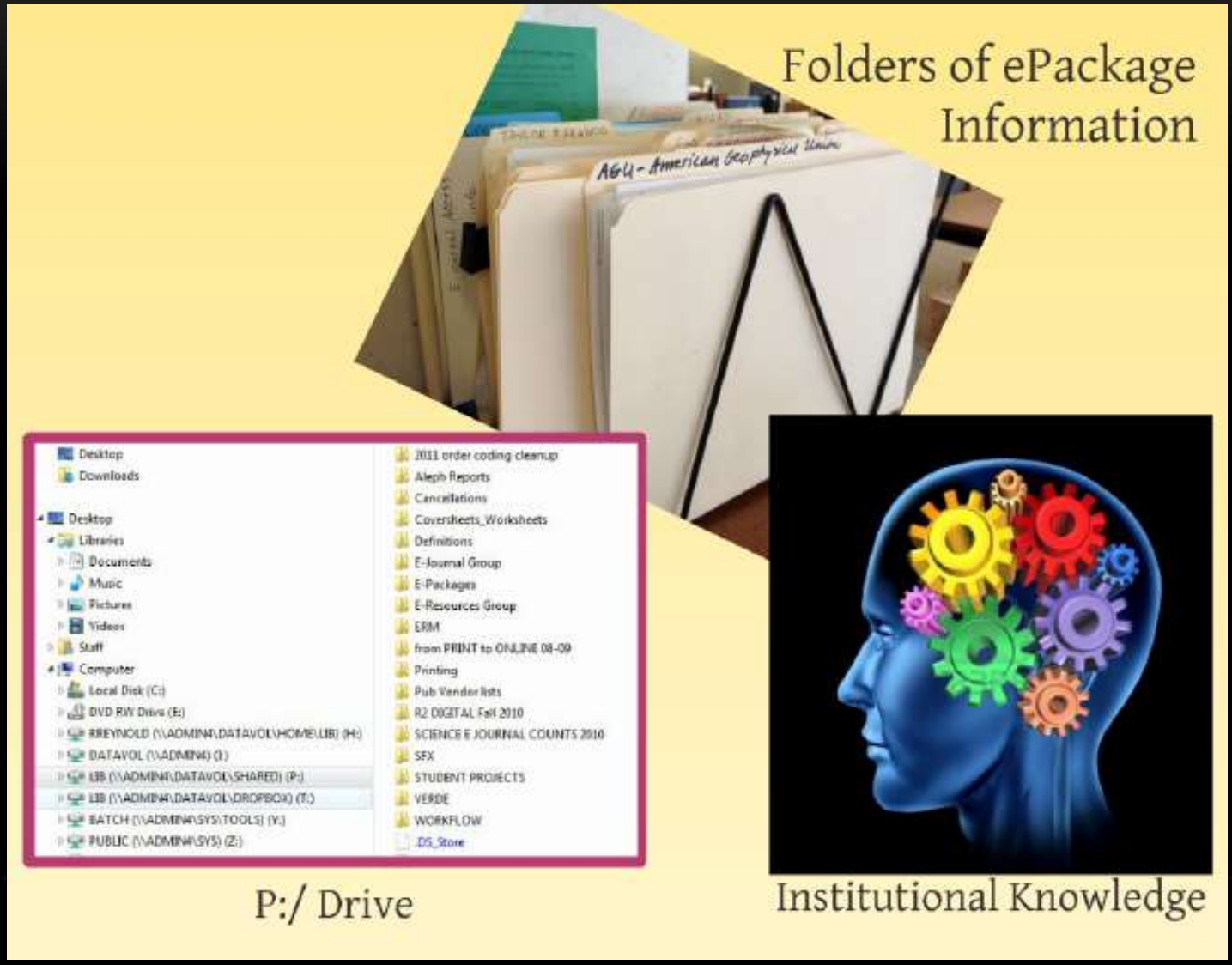
Background: Smith College Libraries

- Private, 4-year, women's liberal arts institution
- 2,500 students
- Largest liberal arts college library—larger than many university libraries
  - 4 branches on campus
- Member of the Five College Consortium
- $3.5 million collections budget
  - ~70% electronic resources
- Aleph, SFX, EDS

BACKGROUND


New E-Resource
1
Head of Collection Development
Metadata Librarian
7
Systems Librarian
Web Specialist
2
3
4
6
Acquisitions Supervisor
Serials Catalogue
E-Resources Associate
E-Resources Associate
5
Smith College E-Resource Workflow

WHERE WE STARTED



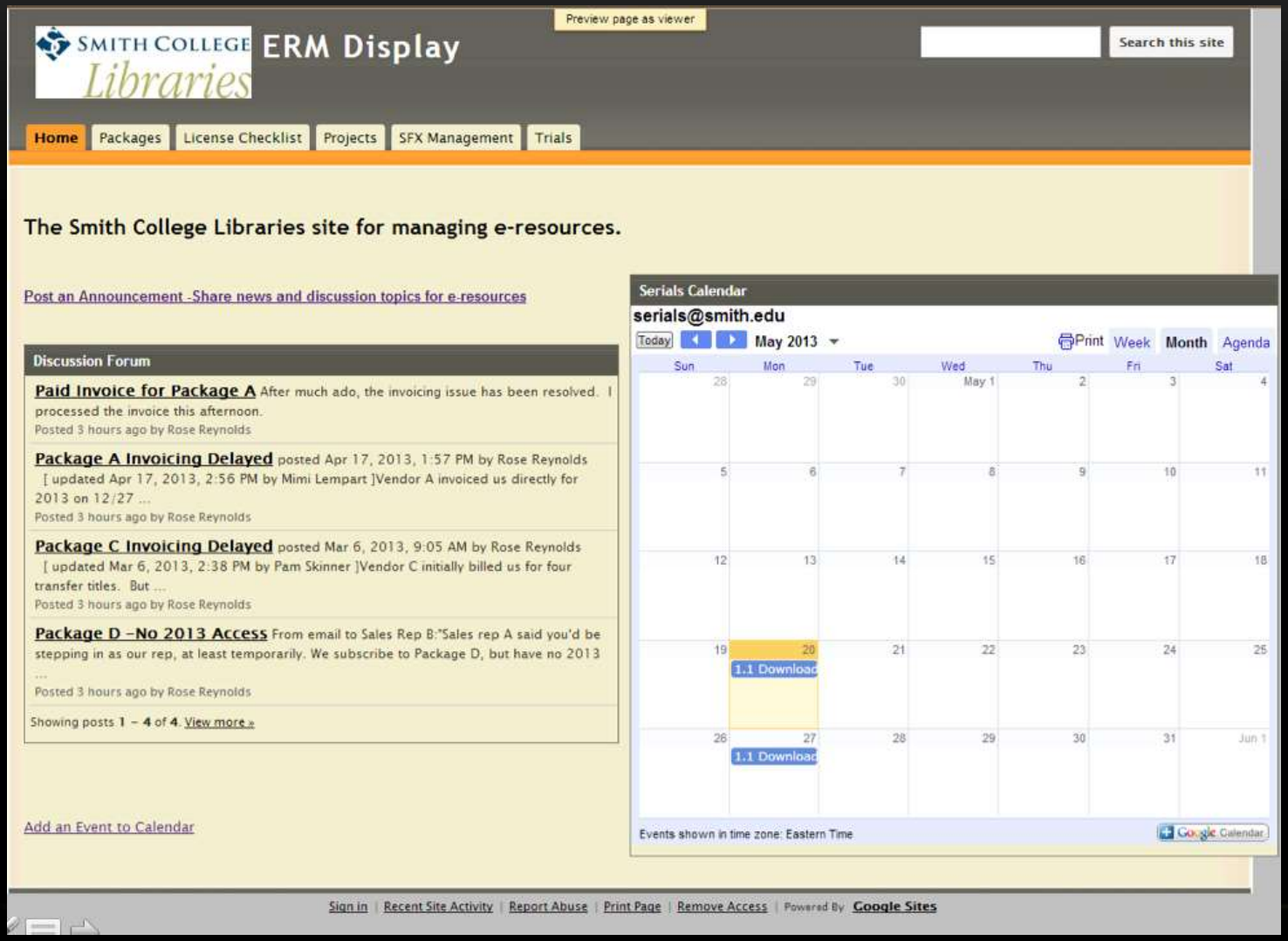
Our GOALS for an ERM

- Streamline the workflow process
- Put less pressure on memory and sticky notes
- Have a more robust picture of each e-resource particularly packages
- Create a place to store problems and ongoing issues
- Avoid the dangers of email

OUR JOURNEY…

- Created a Google Site
  - With the college's move to Google Apps for Education and our creation of a shared email account this seemed like the best platform
  - Took stock of what information we wanted to collect and how
  - Followed an e-resource through its entire lifecycle to really assess workflow
  - Thought about some exceptions to the rule

GOOGLE ERM


Preview page as viewer
SMITH COLLEGE Libraries
ERM Display
Search this site
Home
Packages
License Checklist
Projects
SFX Management
Trials
The Smith College Libraries site for managing e-resources.
Post an Announcement -Share news and discussion topics for e-resources
Discussion Forum
Paid Invoice for Package A After much ado, the invoicing issue has been resolved. I processed the invoice this afternoon.
Posted 3 hours ago by Rose Reynolds
Package A Invoicing Delayed posted Apr 17, 2013, 1:57 PM by Rose Reynolds [updated Apr 17, 2013, 2:56 PM by Mimi Lempart]Vendor A invoiced us directly for 2013 on 12/27 ...
Posted 3 hours ago by Rose Reynolds
Package C Invoicing Delayed posted Mar 6, 2013, 9:05 AM by Rose Reynolds [updated Mar 6, 2013, 2:38 PM by Pam Skinner]Vendor C initially billed us for four transfer titles. But ...
Posted 3 hours ago by Rose Reynolds
Package D -No 2013 Access From email to Sales Rep B:"Sales rep A said you'd be stepping in as our rep, at least temporarily. We subscribe to Package D, but have no 2013 ...
Posted 3 hours ago by Rose Reynolds
Showing posts 1 - 4 of 4. View more »
Add an Event to Calendar
Serials Calendar
serials@smith.edu
Today
May 2013
Print
Week
Month
Agenda
Sun
Mon
Tue
Wed
Thu
Fri
Sat
1.1 Download
Events shown in time zone: Eastern Time
Google Calendar
Sign in | Recent Site Activity | Report Abuse | Print Page | Remove Access | Powered By Google Sites

Our GOALS for an ERM

- Streamline the workflow process
- ~~Put less pressure on memory and sticky notes~~
- ~~Have a more robust picture of each e-resource particularly packages~~
- ~~Create a place to store problems and ongoing issues~~
- Avoid the dangers of email

OUR JOURNEY…

- The Google ERM was a step in the right direction
- BUT…
  - No structured data
  - No standardized fields
  - Not as flexible for non-package resources
  - Doesn't address the workflow of the resources

CORAL

http://coral.library.umass.edu/smtcoral/

CORAL Resources

Hello, Rose Reynolds
logout

Home | New Resource | My Queue | Admin | Change Module

Search

new search

Name (contains)

Provider

ISBN/ISSN

Fund

Acquisition Type
All

Status
All

Creator
All

Resource Format
All

Resource Type
All

Record ID

General Subject
All

Detailed Subject
All

Starts with
A B C D E F G H I J K L M N
O P Q R S T U V W X Y Z

more options...

Displaying 1 to 25 of 503 Resource Records

<< 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 >>

ID	Name	Creator	Date Created	Acquisition Type	Status
539	Oxford University Press Scholarship Online: Classics Collection	Pam Skinner	06/17/2015	Purchase	In Progress
538	Elsevier Major Reference Works	Jenna Lanterman	06/04/2015	Purchase	In Progress
536	Bergey's Manual of Systematics of Archaea and Bacteria	Pam Skinner	06/03/2015	Purchase	In Progress
537	Wiley StatsRef: Statistics Reference Online	Pam Skinner	06/03/2015	Purchase	In Progress
532	Chinamaxx digital library	Glen Mahoney	06/02/2015	Renewal Subscription	Completed
534	Encyclopedia of Ancient History	Pam Skinner	06/02/2015	Ongoing Standing Order	In Progress
533	International Encyclopedia of Ethics	Pam Skinner	06/02/2015	Ongoing Standing Order	In Progress
531	JSTOR eBooks	Pam Skinner	06/02/2015	Purchase	In Progress
535	Wiley - major reference works	Pam Skinner	06/02/2015	Purchase	In Progress
519	Berkshire Dictionary of Chinese Biography	Pam Skinner	06/01/2015	Purchase	In Progress
521	Encyclopedia of Aesthetics, 2nd ed.	Pam Skinner	06/01/2015	Purchase	In Progress
522	Grove Dictionary of Musical Instruments, 2nd. ed.	Pam Skinner	06/01/2015	Purchase	In Progress
523	Oxford Companion to Classical Civilization, 2nd. ed.	Pam Skinner	06/01/2015	Purchase	In Progress
529	Oxford Companion to Fairy Tales	Pam Skinner	06/01/2015	Purchase	In Progress
524	Oxford Companion to Food, 3rd ed.	Pam Skinner	06/01/2015	Purchase	In Progress
525	Oxford Dictionary of New Zealandisms	Pam Skinner	06/01/2015	Purchase	In

CORAL Resources
Hello, Rose Reynolds
logout
Home
New Resource
My Queue
Admin
Change Module
Oxford Companion to Classical Civilization, 2nd. ed.
Product
Acquisitions
Access
Cataloging
Contacts
Accounts
Attachments
(0 records)
Routing
Step
Group
Start Date
Complete
Licensing?
Pam
06/01/2015
mark complete
Add Order to Aleph
SER
06/01/2015
06/12/2015 by Jenna Lanterman
Pay Invoice
SER
06/12/2015
06/12/2015 by Jenna Lanterman
Activate access with Vendor
SER
06/12/2015
06/12/2015 by Jenna Lanterman
Write description and tag for subject pages
Pam
06/01/2015
mark complete
Add to Drupal?
Betsy
Add to EZ-Proxy?
Eric/Betsy
06/12/2015
06/12/2015 by Betsy Sheirer
Activate in SFX?
SER
06/12/2015
mark complete
Catalog in Aleph at Title Level
Pat
06/12/2015
mark complete
Batch Load Records/Original Cataloging?
Lou
06/12/2015
mark complete
Check EDS for Availability
Rose
Consult TLR about activation in EDS
Rose
Notify Liaisons
Pam
06/01/2015
mark complete
Liaison Notification
Liaisons
restart workflow
mark entire workflow complete

Workflow Setup

Acquisition Type	Resource Format	Resource Type
Purchase	Electronic	any
New Subscription	Electronic	any
Additional Part	Electronic	any
New Subscription	Electronic	Database
Renewal Subscription	Electronic	any
New Subscription	Electronic	E-Journal
New Subscription	Print + Electronic	E-Journal
Renewal Subscription	Electronic	Journal Package
Renewal Subscription	Electronic	Publisher Bundle
New Subscription	Electronic	Publisher Bundle
Trial	Electronic	any
Free	Electronic	any
New Subscription	Electronic	Journal Package
Purchase	Electronic	E-Book Package
Renewal Subscription	Electronic	E-Book Package
New Subscription	Electronic	Aggregator
Renewal Subscription	Electronic	Aggregator
Renewal Subscription	Electronic	E-Journal
New Standing Order	Electronic	any
Ongoing Standing Order	Electronic	any
Test	Electronic	any
Purchase	Print + Electronic	E-DVD
Purchase	Electronic	E-Journal

add workflow

CORAL Resources

Hello, Pam Skinner
logout

Home | New Resource | My Queue | Change Module

My Queue

Outstanding Tasks (89 records)
Saved Requests (0 records)
Submitted Requests (25 records)

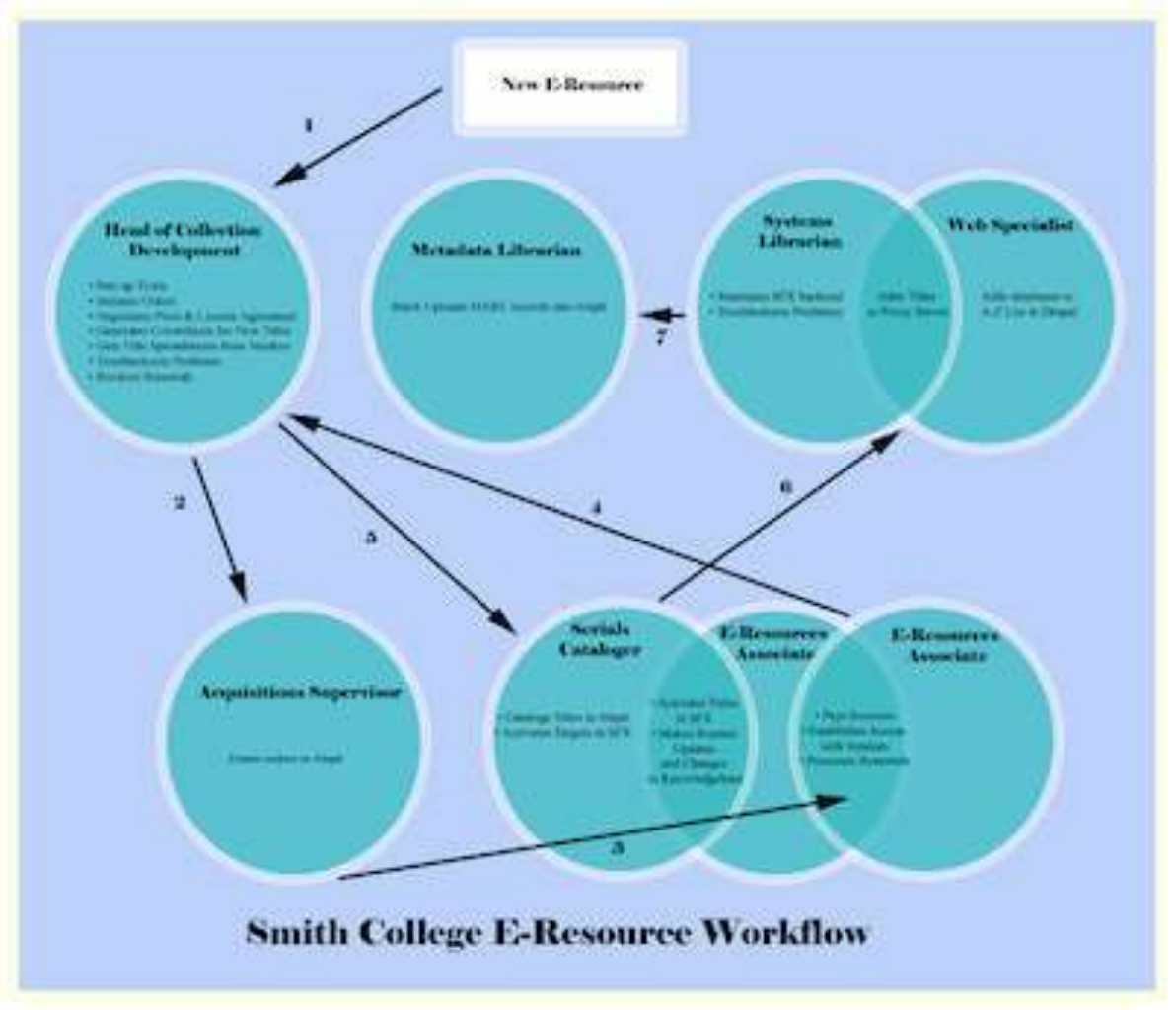
Routing Steps

Activation (1 records)
Cataloging (1 records)
Confirm Access to Additional Material (1 records)
DECIDE TO ORDER OR NOT (3 records)
Do we Activate in Discover? (3 records)
Licensing (1 records)
Licensing? (41 records)
Notify Liaisons (84 records)
Notify Liaisons of Trial

Outstanding Tasks

ID	Name	Acquisition Type	Routing Step	Start Date
539	Oxford University Press Scholarship Online: Classics Collection	Purchase	Write description and tag for subject pages	06/17/2015
			Notify Liaisons	06/17/2015
			Licensing?	06/17/2015
538	Elsevier Major Reference Works	Purchase	Write description and tag for subject pages	06/04/2015
			Notify Liaisons	06/04/2015
			Licensing?	06/04/2015
537	Wiley StatsRef: Statistics Reference Online	Purchase	Write description and tag for subject pages	06/03/2015
			Notify Liaisons	06/03/2015
			Licensing?	06/03/2015
536	Bergey's Manual of Systematics of Archaea and Bacteria	Purchase	Write description and tag for subject pages	06/03/2015
			Notify Liaisons	06/03/2015
			Licensing?	06/03/2015
535	Wiley - major reference works	Purchase	Write description and tag for subject pages	06/02/2015
			Notify Liaisons	06/02/2015
			Licensing?	06/02/2015
531	JSTOR eBooks	Purchase	Write description and tag for subject pages	06/02/2015

BACKGROUND

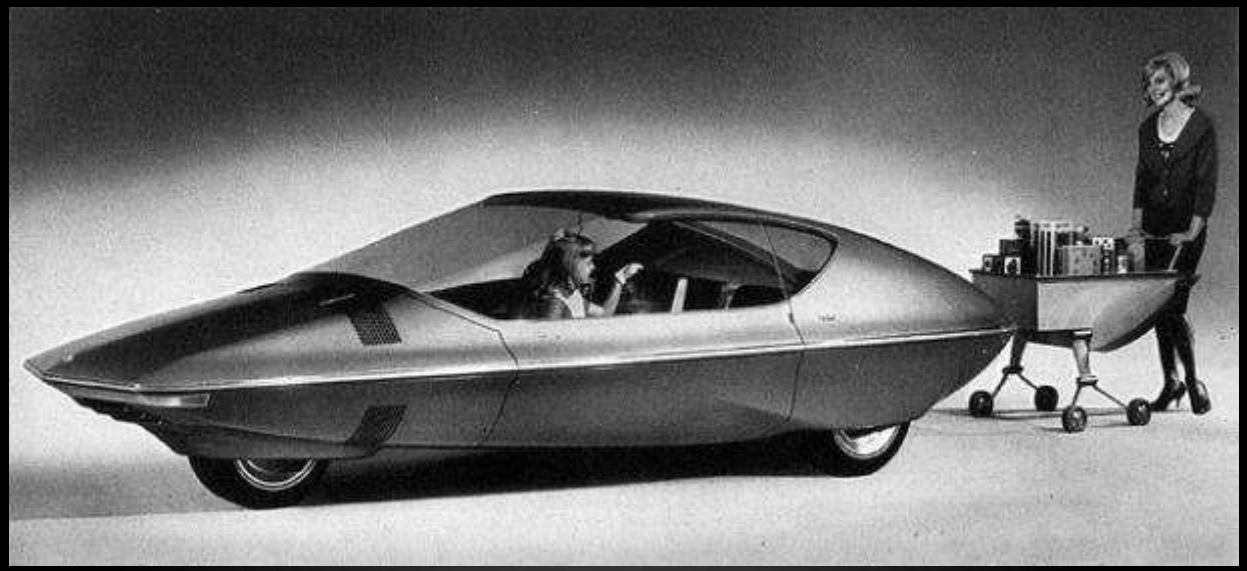

New E-Resource
1
Head of Collection Development
Metadata Librarian
7
Systems Librarian
Web Specialist
2
3
4
6
Acquisitions Supervisor
Serials Catalogue
E-Resources Associate
E-Resources Associate
5
Smith College E-Resource Workflow

Additional Benefits

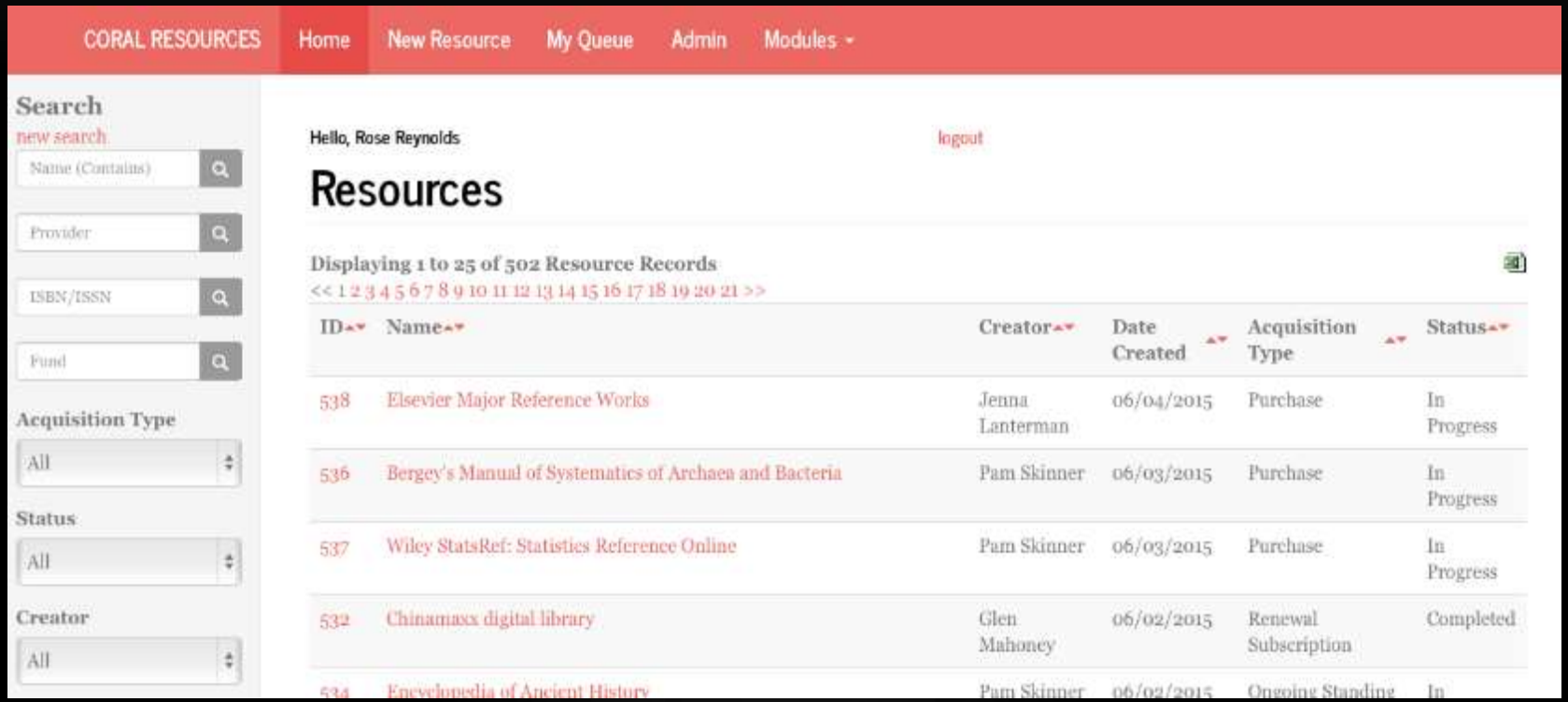
- Storing vendor contact information and updates
- Storing and linking licenses
- Potential for managing statistics
- Strong developer community always coming up with new ideas

FUTURE ERM INITIATIVES

- Developing Bootstrap version of code for CORAL
- Using YouRLS to streamline linking updates
- Potential for migration if necessary



BOOTSTRAP VERSION



http://coral.library.umass.edu/smtcoral_sb/resources/

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- ERIK THE CAT VERY BUSY, "Coral Skeleton," Flickr, accessed June 22, 2015, https://flic.kr/p/bahhiX.
- Mario Klingeman, "Mother's Future Retro Car," accessed June 22, 2015, https://flic.kr/p/9GsXR.
- Photographer unknown, "Washington-area African American Smith College students in front of the Grecourt Gates, 30 September 1968.," *Online Exhibitions*, accessed June 22, 2015, http://smithlibraries.org/digital/items/show/421.
- Tobias Abel, "Goal in the Snow," Flickr, accessed June 22, 2015, https://flic.kr/p/dPVNtj.

Q&A

Thank you!

Please join us at this same time at ALA Midwinter 2016 in Boston!

Incoming cochair: Buddy Pennington
(penningtonb@umkc.edu)

Outgoing cochair: Kate Silton
(ktsilton@ncat.edu)

Current cochair: Robert Heaton
(robert.heaton@usu.edu)

Contact us

We're the LITA/ALCTS Electronic Resources Management Interest Group