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## ERMS Race

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## Discussion

The information in the table suggests some key distinguishing features among the ILS vendors' ERM systems. Different approaches are highlighted in response to a question each vendor was asked: what they would say to distinguish their product from the competition if they had a five-floor elevator ride with a potential customer — the "elevator speech." **Dynix** emphasized complete integration with their other functional modules; **Endeavor** emphasized the support for the full eresource lifecycle and integration with linking and metasearch tools, as well as reducing data duplication by drawing data from cataloging and acquisition systems; **ExLibris** emphasized **Verde's** independence and interoperability with **SFX**, **OPACs**, portals, etc., and their provision of an extensive knowledgebase, support for consortia, and allowance for coordinating the terms of multiple licenses for a single product; **III** emphasized that they built their product based directly on customer needs and requests, and as a result it focuses on proactive workflow strategies, and covers the entire eresource lifecycle; **Sirsi** emphasized integration with the **OPAC** and print resources which will support both staff and user needs; and **VTLS** emphasized adherence to **DLF** guidelines and the integration of access control and licensing information. As with any system, the devil is in the details, but these varying emphases provide one way to take stock of the options evolving in this market.

### Integration of ERM functions

A key feature for any library is being able to integrate their access, acquisitions, and cataloging tools to maximize work efficiency. For this reason, many libraries will be predisposed toward the ERM support software and tools provided by their own ILS vendor, or vendor of electronic resource access tools such as metasearch or link resolving tools. There may be reasons, however, that a library would not be drawn in the direction of the product offered by their ILS vendor. For example, if a site is expecting to move to a new ILS soon, or operates as a consortium that does not need to integrate functionality, or has other organizational reasons to separate electronic from other workflows, the need for a fully integrated suite of products may not be necessary. In addition, if these ILS vendors develop their standalone options so that import and export functions are highly sophisticated and fluid, the need to purchase all functional areas (ERM, OPAC, link resolver, metasearch tool etc.) from a single provider to optimize efficiency may not be as significant.

### Timing of Availability

For many libraries in need of immediate support for eresource (and particularly license) management, the timing of availability could be a key factor. **III's** system is the only product currently on the market; one, **ExLibris**, is targeting initial release by the end of 2004; the rest are promising availability in 2005.

### Extent of adherence to DLF guidelines

All ILS providers indicate they have consulted the **DLF** guidelines, and most suggest they are adhering to them in design, to some degree. The **DLF** documentation could level the playing field for designing systems, since representative libraries have had a chance to publicly document what they need and want in an ERM, and all designers have access to this common wealth of information. This seems to offer a strong beginning for the blossoming new market for ERM software. However, the way and degree to which these guidelines are followed will undoubtedly vary considerably, and it will still be up to libraries to determine what features are most important to their site and how successful each vendor has been at implementing those features.

### Metadata Offered with Software


Providers of ERM support can be divided into those that offer eresource management software (such as the ILS vendors) and those that offer eresource data (such as **SerialsSolutions** or **TDNet**). However, there is overlap between these categories, with at least one ILS vendor supplying data along with software (e.g., **ExLibris**), and some non-ILS companies developing software tools along with the data they are selling (e.g., **SerialsSolutions**). This difference could be significant for libraries in that one would expect the combination of access to data and software in a single source to be efficient and powerful. Like the advantage of full integration from one ILS vendor, though, the details of how each of these systems works to import data from third parties will determine how much of an advantage it will be to have ERM data integrated with ERM software from the same source.

### Kind of interface

Some libraries may have strong preferences for interface type for either for staff or users to access ERM systems and data. What we see here is that the staff interface is either Web based (**Endeavor**, **ExLibris**) or via graphical user interface (**GUI**) (**III**, **Sirsi**, **VTLS**); the user interface for most providers is designed to be Web-

based, but there are several exceptions, including **ExLibris**, whose **Verde** system is expected to be accessed via an **OPAC**, metasearch tool, or library portal, but which will not have its own patron interface.

## Conclusion

The main conclusion of this market overview is a resounding confirmation that robust tools for eresource management are under development by ILS vendors. By the end of 2005, when most or all of these systems are expected to be available, libraries will be looking at a completely different landscape for ERM. With the unusual availability of library-driven guidelines as a foundation for these developing systems, and the prospect of full integration of ERM with other acquisition, cataloging, and access functions, we should find ourselves in a vastly different era for productively managing these expensive and important resources. 

*Please Note: Unfortunately, I was not able to obtain a response from **GEAC** regarding their plans, so they are not included here. In addition, I apologize if I have inadvertently missed another major ILS vendor who is offering ERM functionality. — EFD*

### Endnotes

1. Special thanks to the following individuals for the ILS vendors for taking the time to contribute responses for this article:

**Ted Fons**, Innovative Interfaces, Inc. (III).

**Kathryn B. Harnish**, Product Manager, Electronic Resource Management, Endeavor Information Systems.

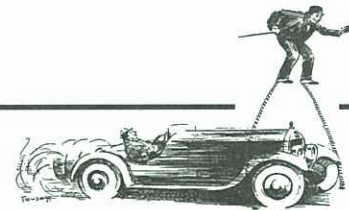
**Ron Passmore**, Director of Marketing, VTLS.

**Ed Riding**, Technical Product Manager, Dynix.

**Jenny Walker**, ExLibris.

**Stephanie Westbrook**, Public Relations Manager, Sirsi.

## ERMS Race



by **Bob Molyneux** (Director, Statistics and Surveys, US National Commission on Libraries and Information Science; Phone: 202-606-9200) <bmolyneux@nclis.gov>

At **Katina's** behest, I attended the June 26 **Endeavor Digital Breakfast** at the **ALA** meeting in Orlando. What follows is partially a report on that, but it is more a first look at **Electronic Resource Management (ERM)** systems. This breakfast was my introduction to these products, but it became clear as I visited exhibitors' booths after this breakfast that there are more vendors coming out with ERM products. These products are undergoing development with many questions not yet settled. Expect preliminary products now and a bevy of them by early next year.

**Rochelle Ballard**, Digital Resources Coordinator at **Princeton** began the substantive talk at the breakfast with a summary of her work managing digital resources at the **Princeton Library** and the database she must maintain about payment, digital rights management information, access rights, use, and so forth about the many electronic publications that **Princeton** subscribes to with their welter of differences in contracts and technical details. It was an excellent, clear, and insightful exposition of the problems that must be managed with these electronic resources. I don't do this kind of work so I found

*continued on page 95*



## ERMS Race from page 94

her talk fascinating and a wonderful introduction to the subject.

The rest of the breakfast dealt with the **Endeavor ERM** product **Meridian** and the steps they are going through at **Endeavor** to develop the product. These guys are serious and the effort seemed systematic and well thought out. It was impressive.

Should each librarian who has tasks like **Ms. Ballard's** design and build her own such database? Vendors are investing in developing these products because they feel there is a market for them, after all, should each librarian in this kind of job also be an expert in databases? Or can the vendors hire the experts to develop products that are easy to use and with useful features?

I went from this breakfast back to the various **OPAC/ILS** vendors and asked: do you have similar projects? All I talked to have things in the pipeline. I had hoped to have a list of who is doing what but I found that the whole area is in flux and concluded that things would change between now and the introduction of products. Indeed, a fair amount of the details I found out at **ALA** have already changed. Most product introductions seemed to be scheduled for early next year. However, there were things in common that I found in talking to the vendors.

I found these similarities between them:

1. They all claim that their products will be compliant with the **Digital Library Federation's "Electronic Resource Management Initiative" (ERMI)** (<http://www.diglib.org/standards/dlf-erm02.htm>). Let me quote from a paragraph that describes what the initiative attempts to do:

"WHEN LIBRARIES ACQUIRE electronic resources from publishers or vendors, they must understand, record, transmit, and inform others about the many financial, legal, interrelational, and access aspects of these arrangements. The acquisitions and licensing processes are complex, publishers transmit this information to libraries in a variety of paper and electronic formats, and the number of licensed electronic products libraries

are collecting is increasing rapidly. Such situations tend to spawn local, ad hoc fixes; what is needed, by contrast, is an industry-wide, standardized solution. The **Electronic Resources Management Initiative (ERMI)**, an ongoing project of the **Digital Library Federation (DLF)**, is creating such a solution."

It appears that this standard is not yet completely formalized because the "final report" is to be completed this summer and it is not available on the Website as of this writing. As a result, complying with it seems to be a goal the vendors have established but actual compliance necessarily must await publication of the standard.

2. There is wiggle room in what the vendors are actually going to do because research is ongoing. There was a certain bit of everyone is doing everything and everyone is compliant but when there are few actual products to demonstrate, rather there are brochures, I thought that I better wait until the dates products were actually launched. As a result, the more I worked on this article, the shorter it got. I did see some demos, though. The **Endeavor** folks had screenshots and demonstrations of how aspects of the product will work but the **SIRSI** folks had an eye-popping live demo of what they were working on.

3. Will it be necessary to have purchased the **OPAC/ILS** of the vendor for a library to purchase the **ERM** product? Some vendors say their **ERM** product only works with the **OPAC**, some don't and, hence, will be available as a stand alone product. I bet the various **ERM** products to work best if you also own the **OPAC/ILS** from the vendor. However, every one of the **OPAC/ILS** vendors I talked to had an **ERM** product in development so I suspect there will be an option for you from your **OPAC** vendor.

4. The vendors I talked to are experimenting and testing in cooperation with libraries and these libraries are listed in their literature so there are operational prototypes being tested. These cooperating libraries will be a source of information if you are interested in seeing the unfinished products while they are being tested. The **Endeavor** folks are also using focus groups to decide which features to supply, so I am betting others are, too.

5. I believe that all will have a Web-based front end. The back ends seem to be various database engines.

According to information I collected, the following vendors have these products in process:

- **VTLS** — **Verify** (<http://www.vtls.com/Products/verify.shtml>).
- **Dynix** — **Horizon Web Reporter**. A white paper *ERM — What is it & What Solutions Does Dynix Provide* is available off its main page (<http://www.dynix.com/>).
- **SIRSI** — **Director's Station** (<http://www.sirsi.com/Sirsiproduts/directorsstation.html>).
- **Endeavor Meridian** (<http://www.endinfosys.com/prods/meridian.htm>).
- **Innovative Interfaces** — **Electronic Resources Management** (<http://www.iii.com/mill/digital.shtml#erm>).

I heard nothing about pricing but we will know the answer to that question soon enough. 🐉

## Adventures in Librarianship from page 91

might remember that **Ms. Kackle** won this same category last year with her entry "Funding." Here is this year's Most Indignant, "Lies."

Aggregators say  
They have everything you need,  
But we know better.

Finally the winner of the \$20 prize for this year's best haiku, "Fortitude" by **Jason Thick**, a cataloger with the **Furtive County Library System**.

MARC format changes.  
Delimiters like hot sand.  
You are not afraid.

Few poems we know reach this level of bravery and exoticism. **Mr. Thick** intimates cerebral joy while giving one an almost physical sock to the belly. Reader, take heed of **Jason's** words, be brave, and submit your haiku in next year's **Annual ATG Haiku Contest**. 🐉

## International Dateline —

by **Anthony Watkinson** (Publishing Consultant, 14, Park St., Bladon, Woodstock, Oxon, UK, OX20 1RW; Phone: +44 1993 811561; Fax: +44 1993 811067) <[anthony.watkinson@btopenworld.com](mailto:anthony.watkinson@btopenworld.com)>

The whole Charleston enterprise has always, or at least has for many years, been international in approach both in its meetings and its publications. Most people, both outside and inside North America, tend to assume that most advances in the world of information that we all inhabit come from the US or even, more narrowly, from California or even Stanford. This is not an unreasonable assumption. However an international perspective is justified because local circumstances do enable

some advances in the take up of e-resources to be made, which are not so easy to achieve in the complex, disorganized and even chaotic US academic scene. I have written in a previous "Dateline" about the impact of the **JISC** (the **Joint Information Services Committee** of bodies funding much of UK higher and further education) on the provision of digital content to the UK academic enterprise. In this issue, my aim is to give further information about the provision to this sector of eBooks in particular, to

point to some initiatives which may travel across the Atlantic and to offer some lessons for wider consideration.

My own particular interest is in e-monographs.<sup>1</sup> A personal communication from a real expert suggests, "In some respects, e-monographs have been more or less ignored for two to three years, as the more pressing issues relat-



*continued on page 96*