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# Electronic Resource Management Systems: Still Trying to Hit the Moving Target

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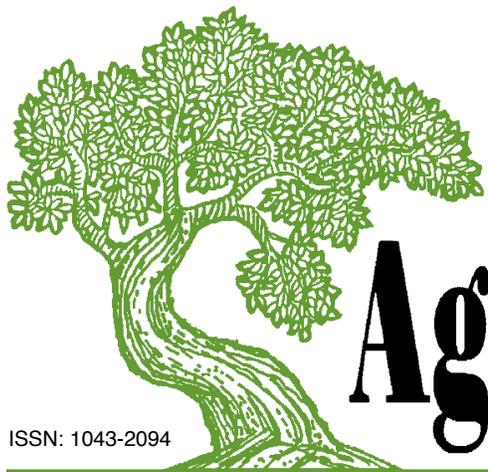
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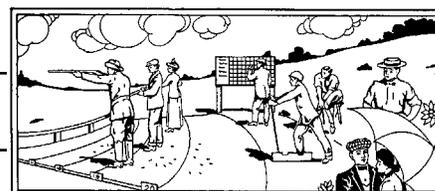
# Against the Grain

*“Linking Publishers, Vendors and Librarians”*

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## Electronic Resource Management Systems: Still Trying to Hit the Moving Target

by **Heather Klusendorf** (Media Relations Coordinator, EBSCO Information Services)  
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In 2007, **Anne M. Mitchell**, Metadata Coordinator at the **University of Houston**, asked the question, “What if you could have a centralized repository for information about your electronic resources, where collection decisions, license terms, workflow elements and usage data could be systematically recorded, made available to library staff, and pushed to end users at their point of need?”<sup>1</sup> In her article, **Mitchell** discusses the basics of what librarians are looking for in a complete e-resource management system as determined by the **Digital Library Federation’s Electronic Resource Management Initiative (ERMI)**. She explains that the “internal processes associated with electronic resources are more of a moving target” where the library doesn’t have “physical control.” Data about e-resources can change daily with publisher and title changes, ISSN and ISBN changes, and publishers who are still defining business models for offering access to their evolving e-resources. Librarians need an ERM that helps them hit the “moving target” that is e-resource management.

Electronic resource management (ERM) systems are not new — they’ve been available to librarians since early 2004. Today, numerous vendors offer ERM systems to libraries in addition to open source options and home-grown ERMs that librarians create in-house to meet their specific e-resource needs. With all these options, librarians still struggle with e-resource management. **Jill E. Grogg**, Electronic Resources Librarian at **The University of Alabama Libraries**, notes that “E-resource data remains spread out among too many systems, and there remains too much need for continued manual data entry.”<sup>2</sup> It’s not surprising considering the myriad issues that librarians face when trying to setup access to e-resources, including new registration on publisher platforms, activation of access, establishing linking, seamless renewal of access and more. Management of e-resource data often requires more than one system and includes individual details that require careful attention with many layers for data entry. Additionally, libraries find that multiple staff is needed to

help navigate e-resource setup. There are many pieces and many players involved.

In January, **EBSCO** added another ERM system to the market: **EBSCONET ERM Essentials**. Our goal is to provide a next-generation solution that solves the problems that we’ve heard from librarians over the years. **ERM Essentials** attempts to bring all the pieces together under one umbrella for succinct management that includes automated population of data for e-resources purchased through **EBSCO**.

As we geared up for the release of **ERM Essentials**, I began investigating current trends in ERMs. This led me to pore through research

*continued on page 16*

## If Rumors Were Horses

Crisis! I had **Rumors** all written, but I did NOT back it up! And now it is G-O-N-E! Gosh! This has never happened before. I have a new computer. It’s the computer’s fault! So — here we go again, if I have left something important out, please send me an email or post it on the **ATG NewsChannel** — [www.against-the-grain.com/](http://www.against-the-grain.com/).

What’s the big news these days. Let’s see. The delightful, perfect (and he’s a skier to boot) **Matt Nauman** will be joining **YBP** as **Academic E-Content Product Manager**. In this newly created position reporting to



the marvelous **Mark Kendall**, **Matt** will be responsible for leading and managing new **eContent product development programs** including **YBP’s** new library-patron-driven acquisition service. There’s absolutely no question that **Matt** is one of the most knowledgeable and respected individuals in the global academic bookselling industry. He joined **Blackwell North America (BNA)** in 1977 and held several key positions in the organization including **Chief Book Buyer and Marketing Manager**. **Matt** was promoted to **Director of North American Publisher Relations** in 1999 and ex-

*continued on page 6*

### What To Look For In This Issue:

<i>Collection Development Policies</i> .....	42
<i>Legally Speaking — Why Talk About Legal &amp; Ethical Issues</i> .....	64
<i>Why I Hate the BISAC Codes</i> .....	70
<i>Textbook Purchasing</i> .....	74
<i>Living on the Fringe</i> .....	79
<i>Letting the Patron Drive</i> .....	83
<i>eBook Identification: Disrupting the Tried and True ISBN System</i> .....	86
<i>Interviews</i>	
<i>Patrick Sommers</i> .....	58
<i>Marilyn Johnson</i> .....	62
<i>Salvador Miranda</i> .....	80
<i>Teresa (Terry) Ehling</i> .....	84
<i>Profiles Encouraged</i>	
<i>Patrick Sommers</i> .....	60



1043-2094 (201004) 22:2:1-B

from librarians who wrote about their experiences with implementing an ERM. Librarians such as **Kristine Condic**<sup>3</sup> and **Nancy Beals**<sup>4</sup> explained why they chose a particular ERM, highlighting both benefits and drawbacks during their implementation process. I was intrigued by the experiences their respective libraries encountered while attempting to hit their “moving target” to make e-resource management easier.

After meeting **Katina Strauch**, editor of *Against the Grain*, at the **Charleston Conference** in fall 2009, we discussed an idea for an article on ERMs. From my earliest days at **MetaPress**, the division at **EBSCO** that hosts scholarly publisher content, I became passionate about helping to solve e-resource problems as I communicated daily with numerous librarians about access and linking problems. I want to continue the conversation about how to make e-resource management more efficient — how to simplify librarians’ daily tasks with e-resource management. In response, **Katina** asked if I would be interested in pulling together a special issue detailing librarians’ experiences with ERMs. In this special issue, we try to gauge the current state of ERMs in today’s libraries.

The articles explore a range of different ERM systems, focusing how the ERM helps the library address common problems with e-resource management. As I contacted nearly every librarian I know, I heard from many that they’re either in the early process of selecting an ERM or they’ve not truly implemented their purchased ERM. I contacted librarians I met at the **Charleston Conference**, such as **Susan Klimley**, **Columbia University Health Sciences Library**, who writes about her ideal ERM; **George Stochakas**, **Indiana State University**, who writes about implementing the **Serials Solutions 360 Suite**; and **Ryan Weir**, **Murray State University**, who argues for implementing an ERM at a small to medium university library. I also contacted **Nancy Beals**, who authored one of the first articles I read on selecting and implementing an ERM

system; she agreed to write a follow-up article about her library’s experiences with the **Innovative Interfaces ERM**.

In addition to a range of librarian perspectives, it is important to represent publishers and vendors — they also play an essential part in the evolution of ERMs. **Heather Staines** from **Springer** agreed to pull together an overview of how publishers can help librarians support ERMs and standardize data for e-resources. **Oliver Pesch** from **EBSCO** presents an overview of how **ERM Essentials** takes the next step in ERM technology by providing pre-populated data from a customer’s order history.

As a writer with an M.A. in English, my guest-editorship was lacking one essential element: an M.L.S. I contacted **Elizabeth “Liz” Lorbeer**, a medical librarian at **Lister Hill Library of the Health Sciences** at the **University of Alabama Birmingham (UAB)**, and asked her to co-guest edit this special issue with me. I needed an expert eye to weigh in on the articles and serve as a librarian e-resources expert. I met **Liz** years ago while working at **MetaPress**; she is one of those librarians with whom I’d spoken over the phone countless times, typically about issues related to **SpringerLink**, **MetaPress’s** largest publisher-partner. She remembered me as being eager to help. I remembered her as being one of those really smart librarians who fully understands e-resources. We collaborated with the goal of providing to the library community the best possible ERM information.

One final piece of our ERM information puzzle was missing: an overview of current ERM trends. While we were able to gather an array of articles about ERMs, we still didn’t have a true, broad picture of ERM issues and problems that librarians are dealing with in 2010. **Katina** suggested that **EBSCO** assist *Against the Grain* with creating a survey to poll subscriber librarians. We created a survey that attempted to target any hot-button issues with ERMs by first gaining an understanding of how ERMs are being used. We asked questions about the tools librarians are using to manage their e-resources, how often the library staff uses the ERM system and what type of

e-resources the library offers to users. After gathering data about how ERMs are being used, we asked librarians a series of attitudinal and ranking questions to determine various levels of satisfaction with the ERM’s functionality and features, whether or not the ERM offers management of necessary areas such as the ability to manage e-journal packages and workflows, and how important various ERM features are to librarians.

From the librarians who responded to the survey, ERM usage trends in today’s libraries emerged. This special issue offers an article that discusses these findings quantitatively and qualitatively. One trend is clear: librarians want *one* system for *all* library processes. Additionally, librarians need help with populating their ERM in order to have truly effective e-resource management. On a positive note, librarians are pleased with the level of improvement that ERMs have brought to their e-resource management. It is always good to find a light at the end of the tunnel. As **Beals** explains in her article in this issue, “an ERM system is a living, ever-changing and growing entity that requires upkeep, attention and, above all, use.” Librarians understand this “ever-changing” and “growing” nature of ERMs; they are working with what they have and patiently waiting for the next evolution that will help them hit the e-resources “moving target,” providing necessary “physical control” of this ever-changing information. 🌸

#### Endnotes

1. **Mitchell, Anne M.** “E is for Entropy: Electronic Resource Management Systems.” *The Serials Librarian*. 51 (2007): 31-37.
2. **Grogg, Jill E.** “Electronic Resource Management Systems in Practice.” *Theory & Practice*. 20 (2008): 86-89.
3. **Condic, Kristine.** “Uncharted Waters: ERM Implementation in a Medium-Sized Academic Library.” *Internet Reference Services Quarterly*. 13 (2008): 133-145.
4. **Beals, Nancy.** “Selecting and Implementing an ERMS at Wayne State University: A Case Study.” *Journal of Electronic Resources Librarianship*. 20 (2008): 62-69.

archived as signed original paper documents, no matter if the terms are captured by an ERMS. Only a few of the terms within a license will ever need to be reexamined, so parsing the whole license for the terms and conditions may not be necessary. If there are three terms that a library finds relevant to day-to-day work, these terms can be captured in a separate e-resource management system, and the original document can serve as storage for the rest of the terms in case they are ever needed.

The **Notre Dame** team has taken this to heart, to the point that any license entered into

**CORAL** can include as many or as few terms as are considered necessary for interpreting the document. After finding that the product they built really did satisfy their internal e-resource management needs, the **Notre Dame** team is releasing the licensing software to other libraries under the GNU GPL open source license (See [http://www.library.nd.edu/eresources/downloads/for\\_more\\_information](http://www.library.nd.edu/eresources/downloads/for_more_information)). With the GNU GPL license, not only does a library receive the benefit of **Notre Dame’s** work, but the ability to customize the product even further to fit particular needs. I plan to try it, since the next challenge for my department is how to make our e-resource licenses, currently languishing on shared server space, more accessible internally.

Is building it yourself the answer? Probably not for most of us, who don’t have the assistance of programmers. However, evaluating your library’s needs in relation to what commercial products offer is an important step before committing to any product. Maybe a newer ERMS will no longer require extensive manual data entry or maybe it will integrate perfectly with your ILS, but does it manage your information in a way that fits with your work? Do you need each bell and whistle, or would a simpler solution target your main weak points more effectively? Can you capitalize on other products available within your institution or on the work of colleagues at other institutions? Instead of building or buying, how about borrowing? 🌸