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# Revisiting Wayne State University's ERM System: Six Years Later

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by **Nancy Beals**  (E-Resources Librarian, Wayne State University)
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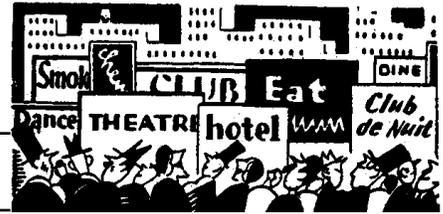
Adopting an ERM system, whether it's home-grown or purchased, is not as simple and straightforward as many would think.  In many ways, an ERM system is a living, ever-changing and growing thing that requires upkeep, attention, and, above all use.  In addition, keeping electronic resources and their increasing growth managed and transparent to the user is a task that is not an easy one for libraries.

In 2004, **Wayne State University Libraries** purchased and put into operation an ERM system after a thorough analysis and research effort.  This implementation was represented in my case study "Selecting and Implementing and ERM at Wayne State University."[1]  In the case study, I discussed key factors regarding the creation and execution of an ERM system and the critical decision-making and goal-setting process that was involved.  More importantly, developing an ongoing evaluation of an ERM system is necessary to make sure that it is meeting the needs of the library.  In the six years since we purchased **Innovative Interfaces Millennium**, the electronic resources management at **Wayne State** has evolved and improved in our library system in a variety of ways.

Going through the process of the preliminary analysis and goal setting proved to be a worthwhile practice.  As our ERM system evolves at Wayne State, we continuously refer to the original goals that were outlined during the analysis.  One of the library system's primary goals is to provide integrated services with enhanced efficiency to our patrons.  This is a goal that continues to govern our evaluation of a new or existing service or support for these services.

During our original goal setting, the team evaluating the need for an ERM came up with questions that helped to define more of what the library needed out of the ERM:

> Will we need to hire someone to manage the ERM?
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> Will the ERM allow us to have more functionality with less staff work?
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> Will we need a new workflow or e-resource process?
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> How much training and time to train will be necessary?

It was determined early on that there would be someone hired to manage the ERM.  At the time, the systems librarian was doing much of the technical work to get the ERM up and running but did not have the time to populate the ERM and handle the general management of it.  The new position of Electronic Resources Librarian would handle many of the daily management and work tasks involved with the ERM, which include creating and populating the records, as well as updating information.  As the system began to grow, it was determined that the Electronic Resources Librarian would be moved from the library's technology department to the technical services department.  This move was necessary to place the librarian closer to the acquisition and management of the electronic resources.

With the increased use of the ERM by library staff, the functionality of it has improved, as well.  Although it has not dramatically decreased actual staff work, it has increased functionality as a unified place for staff to go to when they need information for their work tasks.  For example, by having access to information in the ERM, it reduces the need to email different individuals for different information.  It also reduces the need to keep and store extra emails, spreadsheets, documents (paper or electronic) for login, contact, or administrative information.  Most of the staff has had ERM tasks merged into their job functions.

With the creation of a new electronic resource workflow that heavily features the use of our ERM, the creation and the population of new and existing records with current data were an essential part of bringing the ERM up to speed.  These records include access, statistical, contact, and licensing data that are vital to other library services.  This is important because the ERM has become more of a time saver.  Problems arise when the records do not have the necessary data for other departments to access.  These other departments have to invest more time to track down the information that they need to carry out their library services.  An example of the integration of the ERM into other library services is **Encore**.  With the **Encore** service and the catalog, the ERM contains the holdings information and content descriptions that then display in the catalog.

Training wasn't too much of an issue.  We had already had other **Innovative Interfaces** products, and the ERM was a module that was added to them.  The staff was already comfortable with the record displays in the system, so adding new ones that were similar did not add too much additional time onto training.  The reality is that the staff has decreased their work in other areas of the library with the processing, ordering, and cataloging of print materials.  The staff has now increased their work with the ERM with data entry, maintenance, and management of the information contained in the ERM records.  All of the necessary administrative data relating to electronic resources are now centralized in one system.

What we expected and what has worked for us is that the ERM needed to adapt to process changes and have growth with flexibility.  We also expected the ERM to optimize and organize electronic resources management, which it does.  The ERM has also created

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in its own field.  The database is flexible, and it responds to what I need.  As incomplete and dirty as it is, I remember when managing our journals only entailed checking to see it there was dust on the top of the volumes or by putting a DEMCO colored dot on the spine every time it was reshelved! Now I have a variety of information from usage to indexing to patron issues to bear on my decisions.

But it would be better to have access to an ERM that was complete for **HSL**.  Who knows what patterns I could see if I could easily sort and review all the data I have indicated for all of our titles?  I would dearly love to be able to do subject and school reviews of our titles, something that is just too time-consuming now.

At the present, **Columbia's** integrated library system contains all sorts of payment and vendor information but is a challenge for an infrequent user to use quickly and easily. **Columbia's ERM** is a title list used to maintain OPAC and link resolver connections as well as provide access to usage statistics.  But neither system allows me to accumulate the varied information I need to manage the **Health Science Library** collection.

It also occurs to me that an essential aspect of a big university EMR, useful to the many librarians with selector responsibilities, is the ability to identify the titles for which they are responsible.  If librarians cannot sort and find "their" titles easily, the system will be of little benefit.  And that is a big problem in a big university.  Fund codes are rife and may be shared by many selectors.  Selectors come and go, and responsibility by selector name changes over the year.  Sometimes there is an advantage in the sciences because of legacy mailing addresses linked back to the delivery of print issues.  That certainly is the case with the **Health Sciences Library**, which is located at a completely different address from the Morningside campus and has traditionally been invoiced separately. 🐾

# Electronic Resource Management Systems and the Small to Medium University Library: An Argument for Implementation

by **Ryan Weir**  (E-Resources Librarian, Murray State University)  <ryan.weir@murraystate.edu>

In talking with electronic resource professionals (ERP) from around the country, I have come to the conclusion that our professional lives are continually becoming more and more involved.  This is partially due to the nature of our primary responsibilities as ERPs.  Electronic resources are always changing and evolving, and the ways in which we strive to provide access are evolving as well.  In addition, many of us are also assigned a myriad of other duties on top of our primary ones.  This may involve reference desk duties, liaison work with a department or department(s), acquisitions work and oversight, as well as many other responsibilities.  Due to this fact, ERPs need all the assistance and tools they can get; this includes Electronic Resource Management (ERM) Systems that allow electronic resource professionals to streamline workflows and the dissemination of information to their stakeholders.

An Electronic Resource Management System is a software application that assists a library in tracking the life cycle of an electronic resource.  The life cycle of an electronic resource will be discussed in further detail in the next few paragraphs.  There a several hundred potential data-points or pieces of information that can be gathered about an electronic resource, and electronic resources now include e-journals, databases, eBooks, and other forms of electronic or digitally-born content.  Libraries on the whole are shifting away from print acquisitions and moving towards the acquisition of information in electronic formats.  So, the amount of information that will need to be stored, evaluated and easily accessed about a library's resources will most likely steadily increase as time passes.

For those who are not familiar with the electronic resources profession and workflows, every year an electronic resource professional is responsible for ordering thousands of electronic resources; after ordering, each resource must be paid for and activated.  Sound simple?  Well, add in the fact that these resources are not all ordered at the same time, they come from multiple vendors and publishers, and most of them have to be activated manually — but only after you go through your university's legal department, the dean, the provost, and the president to get their approval for the contract language that you have just reviewed.  This becomes even more complicated when someone wants to have

changes made to the agreement, which starts the process all over again.  After the ERP has accomplished all of this they have to find some way to check and assure these resources continue to function throughout the year.  Once the ERP has accomplished all of this, they need to find a way to gather statistics in a form and fashion that is as accurate as possible and as efficient as possible.  This may involve hundreds to thousands of Websites and sets of login information.  All of these steps, when put together, complete the life cycle of an e-resource.  As a final step, this information must also be input into reports that can easily be accessed and used by stakeholders and for evaluation purposes.



**E-resource Life Cycle**[1]

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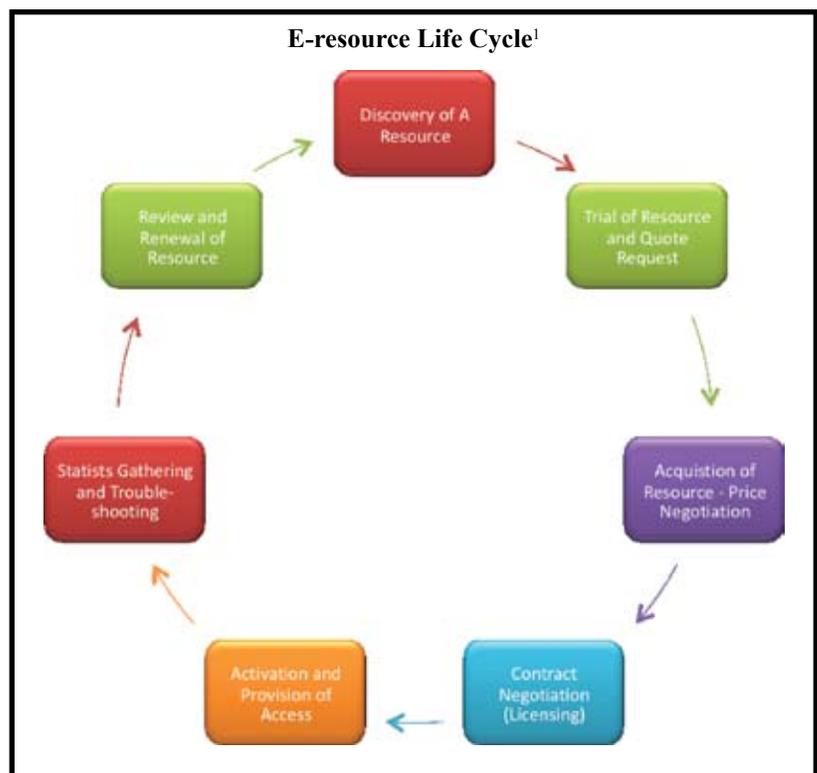
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better communication of information across departments.  Interlibrary Loan uses it to retrieve very important resource sharing information.  Electronic resources licensing information is managed in the ERM with several library departments able to access and use the information that they may need.  For example, **Wayne State Libraries** belongs to the **Innovative Interfaces ArticleReach** consortium.  **ArticleReach** is a service that depends on having correct electronic resource loan and licensing information in our ERM.  Staff that handle **ArticleReach** requests need to access this information in order to make

key decisions on filling that request.  The ERM decreased the time that a request is filled by more than half, and this has expanded our ability as a library and an institution to provide services that rely on it.  Another example of how the ERM adds functionality is the harvesting of usage statistics using the **SUSHI** protocol which provides reports via the ERM for collection development and analysis.

Although the ERM has met our needs and has adapted with our changes, there are areas that need more work or simply are just necessary to handle manually.  When a new electronic resource is acquired by the library, there isn't any getting around manually entering data about it into the ERM.  This can take up staff time — not

just one staff member does all of it, but this is time that has been accounted for.  The ERM is somewhat slow to grow as an entity in itself.  One of the goals that we have met and continue to keep is to have **Innovative's** new releases and upgrades to the entire system; however, this may or may not include new releases and functionality to the ERM.

The future of our system is to keep adding data for new resources and review and modify existing data and to keep the ERM up-to-date with changes that will be needed to keep in line with processes and process changes. It will drive new policy and change current policies. It will always be an asset with implementing new services and features for the library system patrons. 🐾