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by **Heather Staines** (Global eProduct Manager, Springer Science + Business Media)

From my earliest days in E-Product Management, the emails would appear: Does **SpringerLink** work with ERMs? Libraries want to know if publishers work with e-resource management (ERM) systems for importing licenses and importing metadata for their titles. Eager to help, I would ask the customer which ERM the library was using. The answer would often be, "Well, we're still investigating, but we wanted to make sure that your content will still be accessible."

Other ERM-related questions contained inquiries about package names or link resolver issues. My constant concern was that our customers — those customers we share with the ERM vendors and related service providers — might find themselves batted around like ping pong balls, never finding a person responsible for answering their questions. I became convinced, and remain so, that more communication on this front is essential. In tackling this issue, I hope to expand that dialog and find some kind of common ground for libraries, vendors, and publishers regarding the sharing of e-resource information for use in ERMs.

Despite industry news sites that are crowded with press releases, promotions, and **Webinar** trainings about ERMs, I was surprised to learn that not every library has an ERM. In many cases, when approaching librarians, I discovered that purchased ERMs sit waiting to be implemented, in some cases long abandoned as libraries realized that their ILS was a bad match for their chosen ERM. I heard that the challenges surrounding implementation alone are astonishing — many libraries are unable to devote the necessary staff time to populating their ERM with data for hundreds to thousands of titles.

I approached **Andreas Biedenbach**, **Springer** E-Product Operations Manager for the Americas, to gather his impressions about whether ERM support was improving. Since he is largely responsible for the distribution of MARC records and authorization of metadata feeds from **Springer**, questions and concerns on this front often land in his inbox. With the multitude of players in this space, it was clear that there was no simple answer.

One problematic issue from the publisher's side is the differing logic used by so many systems. Consider that representation of a particular publisher business model on a vendor's platform might not be straightforward. Many underlying processes to transfer data between publishers and vendors still require at least some manual intervention. Some systems contain older legacy material with metadata not provided by the original publisher. On the positive side, most service companies have done a good job identifying a contact for publishers within their organization, which can help with quickly resolving such problems. Additionally, occasions like **ALA** and other industry meetings allow for face-to-face discussions on where systems and workflow can be re-

fined. Despite the many challenges, however, **Biedenbach**[1] has noted fewer inquiries from customers with problems in the last year, even as customer questions about our collaboration with certain ERMs vendors increase. I see this as a positive sign.

In reviewing ERM-related topics, I was heartened to see that many standards projects that grew from the **Electronic Resources Management Initiative (ERMI)** seem well underway in regards to usage statistics (**COUNTER**[2] and **SUSHI**[3]) and licensing terms (**ONIX-PL**[4]), holdings delivery data (**ONIX-SOH**[5]), and knowledgebases (**KBART**[6]). Examining **Springer's** participation as well as other publishers' participation and attention to many of these projects, I feel that a good start has been made toward standardizing e-resources data and data exchange. After learning of the many ways in which use of ERMs promises to streamline the management of e-resources and discussing the challenges with many patient librarians, I tried to identify touch-points within the functional areas of support for e-resources, as identified by the *DLF ERM Report* (*http://www.diglib.org/pubs/dlf102/*), where publisher cooperation and coordination might make an impact.

Acquisition and Licensing

While **ONIX-PL** appears to have much promise, **Ivy Anderson**,[7] Director of Collections for the **California Digital Library**, emphasizes that there is more at stake than simply getting an e-version of the license into the library's system. What most librarians seek in this regard is an easier way to *interpret* the license, a simple Y or N listing with, perhaps, a notes field. This level of abstraction, she believes, will make the difference. Part of the implementation of the somewhat "still theoretical" **ONIX-PL**, is more standardization in license components that often seem contradictory in places. Creation of a license template is one step in an often cumbersome test process. **Maria Collins**,[8] Associate Head of Acquisitions at **North Carolina State University**, highlights the potential benefits that could come if publishers shared such templates with subscription agents for eventual extraction in library ERMs. **Bob Boissy**,[9] **Springer** Director of Network Sales and Agent Relations for the Americas and a participant in the **ONIX-PL** testing, is encouraged by the new idea of taking the **OPLE**[10] editing tool to an online environment. It will, he hopes, drive the implementation forward and open up the environment to all the interested players. While urging publishers to familiarize themselves with **ONIX-PL**, **Tim Jewell**,[11] Director of Information Resources and Scholarly Communication at **University of Washington**, encourages publishers to consider instances where a true license is not needed and the **SERU**[12] standard will suffice.

Implementation and Access Provisions

Frequently, I heard calls for more consistency in information and naming conventions

for publisher packages across venders and service companies to save administrators from the task of chasing down a package name. **Deberah England**,[13] Electronic Resources Librarian at **Wright State University**, describes her ideal activation process: "When a resource is ordered, the librarian can go to an ERM repository or the publisher site and pull down the contact, resource, and any other information needed into the ERM, or, alternately, at the point of order, the publisher would send a data feed that automatically deposits appropriate information into the ERM and activates access — a kind of "payroll direct deposit" in the ERM." This scenario sees the publisher directly communicating with the library to feed correct data to the ERM.
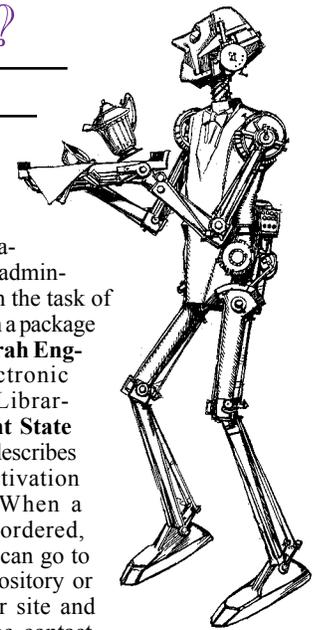
Communication here is key. One suggestion is creation of a standardized way to communicate the availability of an e-resource in real-time, so a library will know if an access problem is local. A standard communication of suspected licensing breaches can also be helpful. On the flip side, publishers might consider a standard format for libraries to report access issues in a way that thoroughly documents a problem for more effective publisher investigation.

One essential mechanism for access and linking underlines the need for strict attention to metadata. **Adam Chandler**,[14] E-Resources & Database Management Research Librarian at **Cornell**, and **Maria Collins** both raise this issue. In some cases, not enough metadata is present for the request to go through, and a patron ends up at a dead link; in other cases, use of an ISSN proves ineffective for true serial access. More granularities in metadata can reduce instances where a user lands on a higher-level page within an e-resource and then has to conduct the search again within that same platform. Clearly, more standardization would benefit researchers, as well as librarians.

Resource Administration, Staff, and End-User Support

While contacts for publishers may shift from person to person or department to department depending on the specific issue, a library's ability to store and easily update this information is crucial. The information must remain continuously stored in one location. **Katie Rizzio**,[15] Electronic Acquisitions Librarian at the **University of Pennsylvania**,

envisions a directory of configurations for resources, including the URLs, where admin functions are accessible. Another suggestion calls for the creation of a common repository for publisher documentation, so that libraries do not have to maintain this information on their own sites. In this area, **Deberah England** also suggests that publishers can set up a data feed in a standardized format to push the latest information out to their customers for loading into their ERMs.

Product Maintenance and Review

I was surprised to discover how manual a process the correction of titles can be on the library end. In many cases, I learned, this is due to a desire to update library systems between vendor updates. Improvements on this front, as noted by **Katie Rizzio**, stem from recognition by libraries, vendors, and publishers of the need for best practices, as well as from adjustments in ERM-providers workflow. Another side of this issue is the prospect of a regular package review between libraries and publishers. While a publisher might be surprised to hear inquiries from librarians about complimentary or bonus access to content, the need to display accurate collections to patrons and to make wise collection-development decisions requires the differentiation between owned, leased, or temporary access status. **Maria Collins** notes the usefulness of widgets on some publisher sites that allow the regular downloading of content freely accessible to a library. If there were a way to push this information out to libraries through a regular feed, it would be even more beneficial.

Ensuring consistent access, trouble-shooting, and technical support are major concerns. Library troubleshooters have become savvier, and vendors who may have initially underestimated the level of support needed have adjusted accordingly. Suggestions here focus on the ability to reach an actual person, rather than just a Web-form that might merely bounce back with a message that the support mailbox is full. **Greg Matthews**,[16] Catalog Librarian and Coordinator of E-Resources Management at **Washington State University**, a veteran with more than five years ERM experience, contends that "the resolution of support issues has improved. In earlier days, a helpdesk staffer might know the technical side of the product but not *how* a library needed to use it; moreover, the library staff was still learning how to ask the right questions." Locating a knowledgeable person over the phone or via email to assist personally helps tremendously with weeding through ERM problems.

Renewal and Retention

Time and again I heard about the back and forth involved in reconciling title lists for a renewal. Some of this burden has been relieved, I learned, by automated processes available through subscription agents, but obstacles remain for those libraries that renew directly. Authority control in naming a resource is another factor to consider. Generation of an accurate title list can be complicated further by the numerous iterations in the library's ILS — nearly 90 different variations for some larger publishers!

Where do we go from here?

Of course, some challenges with ERMs fall beyond what the publisher can directly affect. **Ivy Anderson** points to the role that an individual library workflow can play in ERM utilization. During my conversations, I detected a noticeable difference in librarian outlook, depending upon when a library implemented their ERM (or tried to). Early adopters were in many cases forced to create their own loading tools, to train themselves based on limited documentation, or even to build their own home-grown ERMs. Our ERMs today are very much first-generation products with both software and standards that have yet to mature enough to support these complex resources and workflows. Still, areas for improvement can be identified. **Ivy** stresses data accuracy from publishers' and system vendors' compliance with the recently-issued **KBART** recommended practice, as well as a focus on more granularity and consistency in holdings information to support interoperation among the many flavors of products now available. She stresses timely and structured communication from publishers, preferably via **ONIX-SOH** for direct loading. In addition, the overall need for better technical and administrative support remains across the many areas mentioned above.

ERMs are complex tools, referred to by many librarians as the "holy grail" or "magic bullet" that promises, to varying degrees, to make their lives easier. When I asked **Tim Jewell** whether he thought some cloud-based solution might come along and solve these complex issues, he chuckled and told me that "the ingenuity demonstrated daily by technology companies would likely require us all to continue to adapt." **Darby Orcutt**,[17] Senior Collection Manager for Humanities & Social Sciences at **North Carolina State University** was quick to differentiate between two different levels where efforts might be focused: the higher-analytical level versus the day-to-day need to "keep the trains running on time." I encourage publishers to participate fully in the conversation on both of these levels regarding next steps in making ERMs the needed "holy grail" that can reduce e-resource management difficulties. 🌴

Endnotes

1. **Beidenbach, Andreas**. Telephone interview. 29 January, 2010.

2. Counting Online Usage of Networked Electronic Resources: *http://projectcounter. org*.

3. Standardized Usage Statistics Harvesting Initiative: *http://www.niso.org/workrooms/sushi*.

4. Online Information Exchange for Publications Licenses: *http://www.editeur. org/21/ONIX-PL/*.

5. Online Information Exchange for Serials Online Holdings: *http://www.editeur. org/18/Current-Releases/#SOH*.

6. Knowledge Bases And Related Tools working group: *http://www.uksg.org/kbart*.

7. **Anderson, Ivy**. Telephone interview. 5 February, 2010.

8. **Collins, Maria**. Telephone interview. 10 February, 2010.

9. **Boissy, Bob**. Email interview. 11 February, 2010.

10. ONIX PL Editor: *http://www.jisc. ac.uk/whatwedo/programmes/pals3/onixeditor.aspx*.

11. **Jewell, Tim**. Telephone interview. 10 February, 2010.

12. Shared E-Resource Understanding: *http://www.niso.org/workrooms/seru*.

13. **England, Deberah**. Telephone interview. 2 February, 2010.

14. **Chandler, Adam**. Telephone interview. 26 January, 2010.

15. **Rizzio. Katie**. Telephone interview. 29 January, 2010.

16. **Matthews, Greg**. Telephone interview. 2 February, 2010.

17. **Orcutt, Darby**. Telephone interview. 2 February, 2010.

Following right along, **OCLC** and **H.W. Wilson** will work together to transition library subscriptions for **H.W. Wilson** databases provided on the **OCLC FirstSearch service** to the **WilsonWeb platform** over the next 16 months. A FAQ concerning **Wilson** databases for customer support, billing, content, and platform transition is available at *www.hwwilson. com/oclc/* and a full press release is loaded on the *ATG* NewsChannel.
www.against-the-grain.com/

Two really energetic and bam-zowie people have joined **On Demand Books** as Vice Presidents. **Steve Sutton** and **Susie Stroud** have joined **On Demand Books** as Vice-President, Director of University Library Sales and Vice President, Direct of Content Acquisition respectively. **Steve** will be responsible for sales of **On Demand Books** print services via the **Espresso Book Machine** to university libraries and campus bookstores. We all remember that **Steve** has extensive university and library experience, most recently at **YBP Library Services** where he was VP-Library Services and Director of New Business Development. Prior to **YBP**, **Steve** held management positions at **Alibris**, **NetLibrary**, and **Blackwell's Book Services**. **Susie Stroud** will oversee the company's strategic efforts to increase the volume of titles available for purchase through the **Espresso Book Machine** catalogs and its **EspressNet** software. Her work will involve permissioning content from publishers, content aggregators, and international library collections. She will also manage the company's relationships with print on demand and digital asset repository partners. **Susie** has over 20 years of experience in academic, professional, and reference publishing, most