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Measure for Measure: Librarians Want More Effective ERM, Results from ERM System Usage Trends Survey

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With these features, EBSCO has done a great deal to simplify the process of managing a customer's e-journals. When it came to designing **ERM Essentials**, we realized that if we could build a system that would seamlessly integrate with other EBSCO systems and our Order History, we can solve a significant number of the challenges our customers were experiencing with managing their e-resources. This is the approach we took and one that has resulted in a simpler, yet very effective, ERM system.

With **ERM Essentials** as part of our supply chain, applications we offer do more than simply provide a place to store data and monitor tasks that happen elsewhere. When used in conjunction with EBSCO's other tools, we actually eliminate many time-consuming tasks. With **ERM Essentials**:

- **E-journal holdings are automatically populated** when ordered through EBSCO. This includes individual subscriptions, as well as titles within packages.
- **About 100 data elements are automatically populated** for those titles ordered through EBSCO. To put this savings in perspective, in a recent survey of our **ERM Essentials** customer accounts, on average we automatically populated over 100,000 data points.
- **Cost data and license history is retained** by automatically keeping a record of purchase history and the relevant terms. This allows librarians to perform historical cost-per-use analysis.
- **Integration with Order Activation** allows information on registration status to be automatically included in **ERM Essentials**.

- **Package renewal** and other tasks related to managing a customer's e-journals are handled in associated systems built for this purpose, thereby minimizing the effort. For example, the package renewal process is reduced to hours instead of days or weeks.

From what you have read so far it may seem that we built **ERM Essentials** only to work with e-resources bought through EBSCO. This is not the case. We realized that customers need one system where they manage all their e-resources; therefore, **ERM Essentials** was built to handle *all* e-resources and even though we provide a tremendous amount of time-savings for those e-resources purchased through EBSCO, our goal is that **ERM Essentials** is one of the most effective ERM systems on the market for managing the library's *complete* e-resource collection. Features include:

- **Support for entering licenses** so that data is managed at the optimal level (master license), and resources related to those licenses can be added with a click of the mouse.
- **Quick entry of cost data** related to titles and databases within the customer's collection.
- **Browsing and searching of the collection and orders (license data)**, providing library staff with an immediate way to look-up terms and conditions from a variety of contexts.
- **Reminders and tasks** can be set to help organize workflows or simply set as follow-ups for recurring tasks.
- **Upload features** to simplify capturing data from other systems.
- **Customization of what library staff see** means the administrator has control over which of the 300 data elements

he or she wants shown; these elements may be hidden, renamed and re-ordered as needed. Library staff members can each have their own login displaying only the features and functionality they are entitled to access.

- **Usage consolidation and cost-per-use analysis** features are coming soon in an add-on module.

There is much more to **ERM Essentials** than has been described in these few short paragraphs, but this provides a glimpse into the system we have built and how we will be continuing to enhance it over time.

EBSCO has been in the business of serving libraries for more than 60 years. Our success comes through the provision of services that make the lives of our customers easier. With **ERM Essentials** we not only saw the significant e-resource management challenges facing our customers, but we also recognized the opportunity presented by our unique position in the supply chain to provide a solution that can truly make a difference. **ERM Essentials** will save our customers hours and hours of time on data entry, which translates to thousands or tens of thousands of dollars in labor costs. And because so much data are automatically populated, it is a system that library staff can rely on to give the answers they need. By all accounts, **ERM Essentials** is the right product at the right time and one in which EBSCO will continue to invest. 🌱

Endnotes

1. **Electronic Resource Management Initiative:** <http://www.diglib.org/standards/dlf-erm02.htm>.

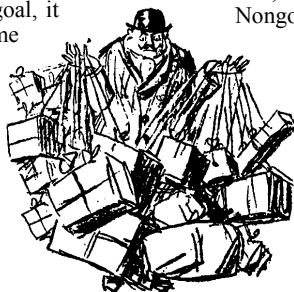
Measure for Measure: Librarians Want a More Effective ERM, Results from ERM Systems Usage Trends Survey

by Heather Klusendorf (Media Relations Coordinator, EBSCO Information Services) <Hklusendorf@ebSCO.com>

According to a recent survey of *Against the Grain* readers, librarians seem pleased with the level of improvement that e-resource management (ERM) systems offer to daily e-resource workflow; however, there is still room for improvement. Librarians report needing help populating the ERM data and maintaining that data for accuracy. The majority of librarians surveyed want to be able to use one system, having the ERM integrate seamlessly with their integrated library system (ILS). Many librarians continue to supplement their ERMs with workaround such as spreadsheets and other Web-based tools. The goal, it seems, is to create an ERM that reduces the amount of time and systems for updating e-resource information.

Survey Methodology and Demographics

On Feb. 22, 2010, 1125 emails were sent to librarians in the *Against the Grain* readership, inviting them to participate in a study on ERM System Usage Trends. The questionnaire contained 18 questions about ERM use and was administered via a commercial, Web-based surveying application. In all, 269 individuals responded.



The main objectives of the study were to examine current librarian solutions for managing e-resources, identify satisfaction levels with ERM systems and applications, assess the relative importance of the core functionalities of ERM systems, explore attitudes toward ERM systems among librarians, and collect relevant librarian profile and demographic data.

Almost 88% of respondents indicated that they work in a college or university library setting. The remaining 12% are library professionals in Law, Medical/Hospital, Corporate/Business, Government, and Nongovernmental Organization/nonprofit settings.

Twenty-eight percent of the respondents said they were e-resources librarians. Almost 19% indicated they were acquisitions librarians, and 7.6% were serials librarians. Fourteen percent of the study participants who provided their job role reported they were either a library director, associate, or assistant director.

Perception of Need

As we suspected, e-resources are becoming more prevalent in libraries, with almost all librarians respond-

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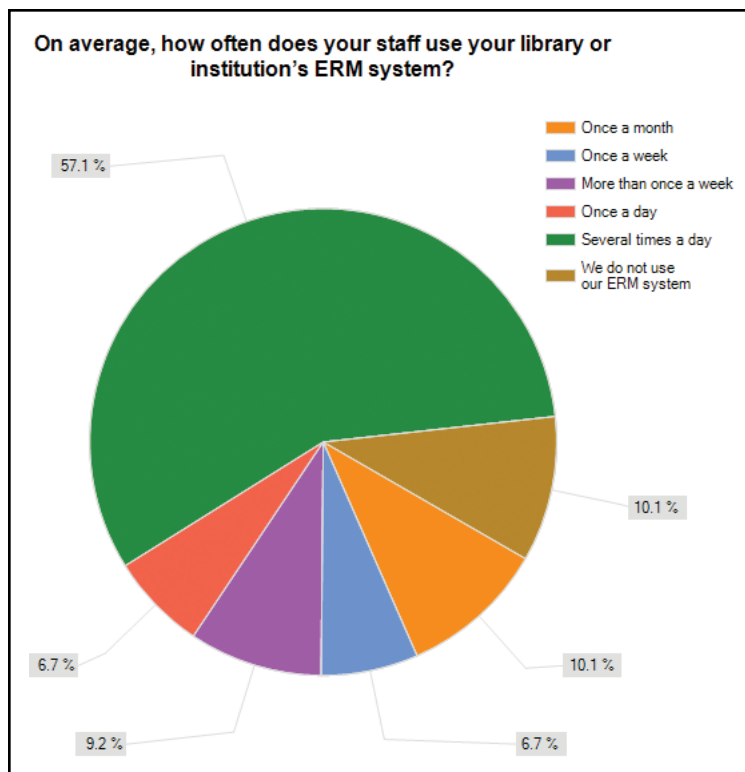
ing that they offer some type of e-resource to users. In order to identify the perception of need for ERMs within libraries, we asked participants what e-resources their library uses. Ninety-nine percent of librarians responding offer e-journals in their libraries to users, 98% offer eBooks, 99% offer online research databases, and 98% subscribe to e-journal packages. While many librarians (75%) responded that they use some type of ERM system, 94% of all librarians surveyed continue to use spreadsheet applications (**Excel, Access, Lotus**, etc.), either as their primary e-resource management tool or to supplement their ERM. Using spreadsheets was mentioned frequently in the survey's open-ended questions, with librarians making comments such as: "some functions are still easier and faster to do in a spreadsheet" and "we're still drowning in spreadsheets."

While 75% of librarians responding are using an ERM system, many of those who are not currently using an ERM to manage their e-resources mentioned that they had an ERM in the past and let the subscription lapse. Reasons for letting the ERM subscription lapse echoed similar complaints of the ERM requiring too much time and manual data entry to maintain, making the ERM a "tremendous drain on time" for the library staff. However, many of these same librarians noted that they continue to be interested in evolving ways to manage e-resources.

Use of ERMs

Among librarian respondents who reported currently using an ERM, findings show they are familiar with ERMs and are using them frequently to manage e-resources. They are knowledgeable about ERM systems with only 10% admitting that they do not frequently use their ERM. Fifty-seven percent of respondents who use an ERM use it several times a day, and 23% use it at least once a week or more.

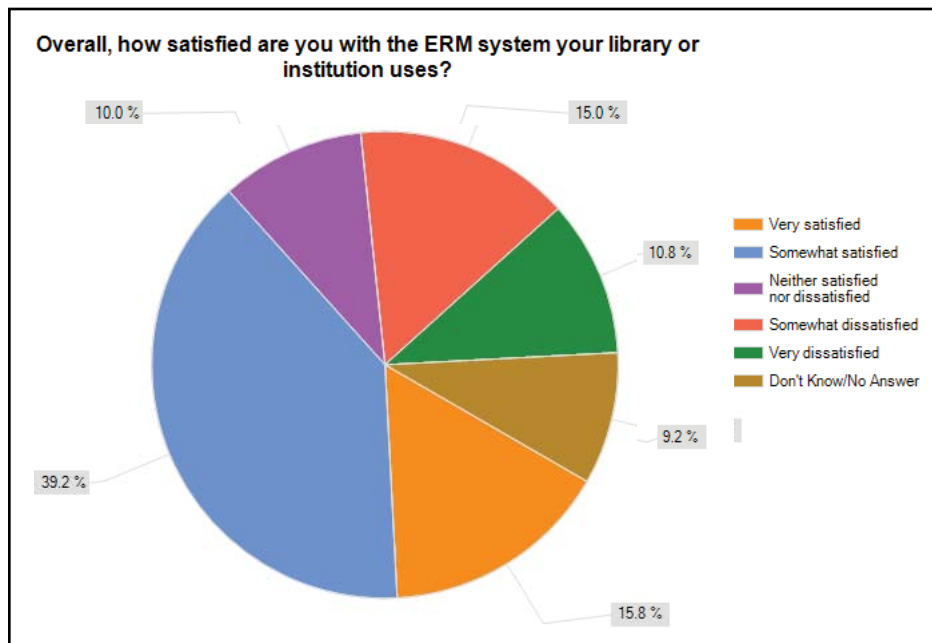
These data indicate that with relative frequency, librarians rely on their ERM to help them manage e-resources on a daily to weekly basis.



Many librarians noted in the open-ended questions that they are not using their ERM to its full extent. Reasons for not using an ERM to its full capacity include "e-resources data not populated," "system being inflexible (not communicating with other Web-based tools or allowing field customization)", and "not very easy to use and not convenient for others to find the information once entered." One librarian commented that the "care and feeding is overwhelming." Populating e-resources data and being able to keep that data up-to-date is crucial to a library using an ERM to its full capacity.

Satisfaction with ERMs

Librarians who implement and begin frequently using their ERM tend to have a positive experience; librarians who find that maintaining an ERM is too time consuming due to populating and



keeping data up-to-date report a negative experience. In this latter instance, many revert to spreadsheets and other tools that are not Web-based for e-resource management. Overall, 55% of librarians who answered the question "How satisfied are you with the ERM system in your library?" are satisfied with their ERMs, while only 24% are dissatisfied. Ten percent responded that they are neither satisfied nor dissatisfied.

A surprising outcome from a series of questions was the ability to determine exactly how librarians are using their ERMs. Many simply use their ERM for e-journal and online databases without delving deeper into functionalities for workflow or renewal management, yet these functionalities are considered important to librarians. Librarians were asked a series of questions where they ranked their experiences with functionalities, features, and attributes of their ERM from 10, being excellent, to 1, being poor. This question was designed to gauge what librarians feel their ERM does well or does not do well and, also, to determine what is notably missing from current ERMs. The majority of librarians responding selected "not applicable" when rating how well their ERM handles a certain functionality such as "ability to handle trials" and "ability to handle renewals," revealing key gaps in current systems.

According to our study, librarians are primarily using ERMs for e-journal and e-package management, online database management, and access to license terms and conditions. Librarians are also taking advantage of their ERMs ability to integrate with the library's journal list and link resolver, giving this feature a positive rating (ratings between 10-7 are considered positive/high).

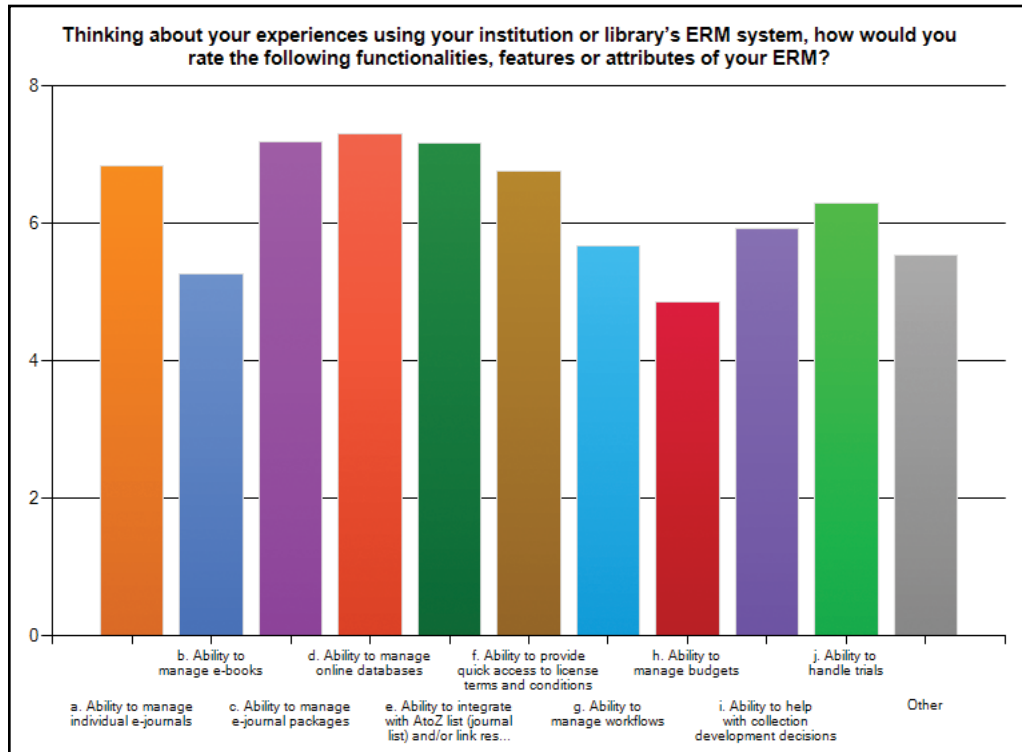
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Many librarians consider their ERM to be a “work in progress,” believing that “these systems will only get better over time.” Librarians note that they are pleased with the general level of improvement that ERMs

provide, reducing the amount of time and effort typically needed for regular e-resource management, as indicated by one librarian who added that, “The ERM allows us, as a department, to share and manipulate e-resource related data to reduce duplication of effort and facilitate smoother workflows.” For this reason, many librarians are willing to be patient with their ERMs, acknowledging that there is still “room for improvement.” Librarians also noted that a lack of full understanding about what the ERM can do may also be affecting their perception of the ERM.

Not surprisingly, according to the survey, librarians want it *all*. We contrasted the satisfaction levels with functionalities, features, and attributes with a later question that asked, “How important to you are the following ERM features or attributes?” Each feature listed was rated as important by the majority of respondents. The highest-rated feature was “the ability to manage e-journal packages” with 74% rating this feature as extremely important. Other features rated as extremely important include

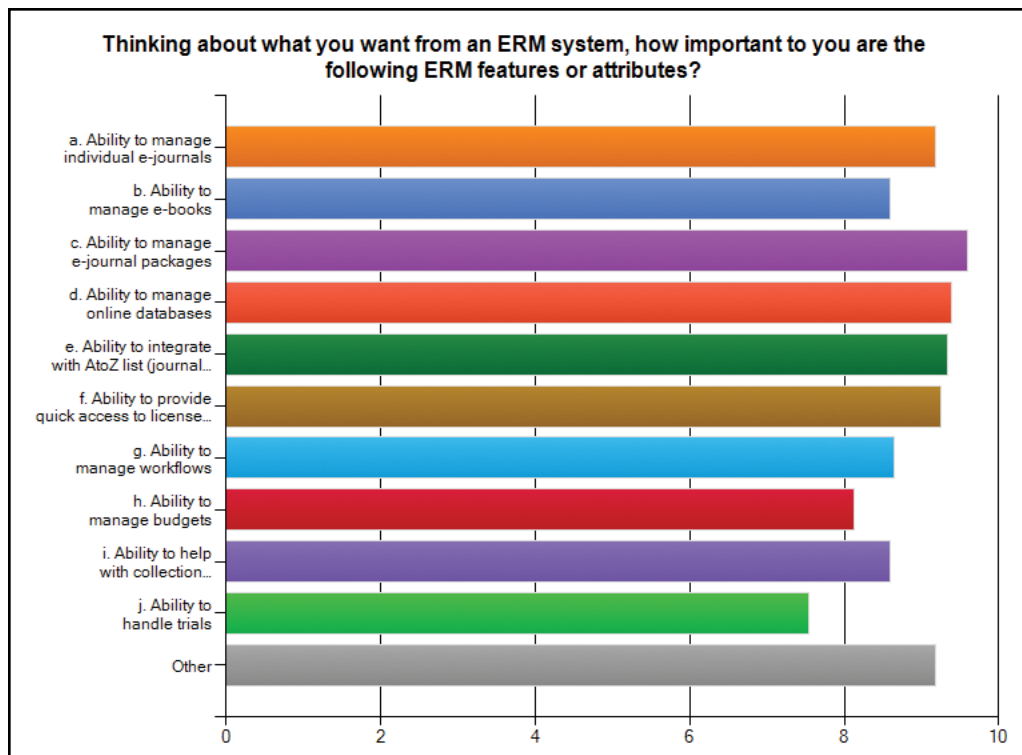
“ability to eliminate managing data in many systems” (66%), “ability to manage online databases” (65%), “ability to integrate with journal list or link resolver” (63%), and “ability to manage individual e-journals” (61%). The only feature that was given an average rating was the “ability to handle trials,” with 12% of librarians rating this as slightly above average in importance.



Three features that librarians felt their ERM systems executed poorly are the “ability to manage budgets” (17%), the “ability to import data from other systems” (17%) and the “ability to eliminate managing data in many systems” (16%). In addition to these lowest-rated functionalities, many librarians noted in the open-ended questions that their ERM does not handle eBooks well. While 98% of librarians responded that they offer eBooks in their libraries, 30% responded “not applicable” when rating how their ERM handles eBooks. From these responses we may infer that librarians are not yet using ERMs to manage eBooks, instead concentrating on e-journal management.

Rating of ERM Components

The survey shows that librarians find their ERM easy to use and believe that using an ERM to organize e-resource data aids in making collection-development decisions for the library.



In addition to asking what functionalities work well and what features are important to librarians, we also asked for librarians’ attitudes about the different components offered in an ERM: “How strongly do you agree or disagree with the following statements regarding your ERM system?” This question helped us gauge how librarians *feel* about the current functionality in their ERM system. Many librarians find their ERM “easy to use” (36% agree) and “essential for managing my library’s e-resources” (37% agree). The majority of librarian respondents were neutral when asked if their “ERM vendor frequently offers useful new enhancements and features,” with 24% agreeing and 30% disagreeing that useful new enhancements and features are offered frequently. Librarians expressed concern about whether or not the ERM system was being advanced with added improvements. Many librarians noted that

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their ERM does not integrate with their ILS, which results in problems with managing budgets and the need to update multiple systems many times for the same data.

required when maintaining an ERM. When detailing why librarians might have cancelled or no longer use a purchased ERM, some librarians commented that they “found it too labor intensive for our staff to use” and that “It’s all data and labor intensive no matter what you do.” Librarians repeatedly mentioned the difficulty entailed in populating the ERM, labeling this process as “cumbersome” with “too many links/pages that need to be filled out” for e-resources information. One librarian noted, “Most data

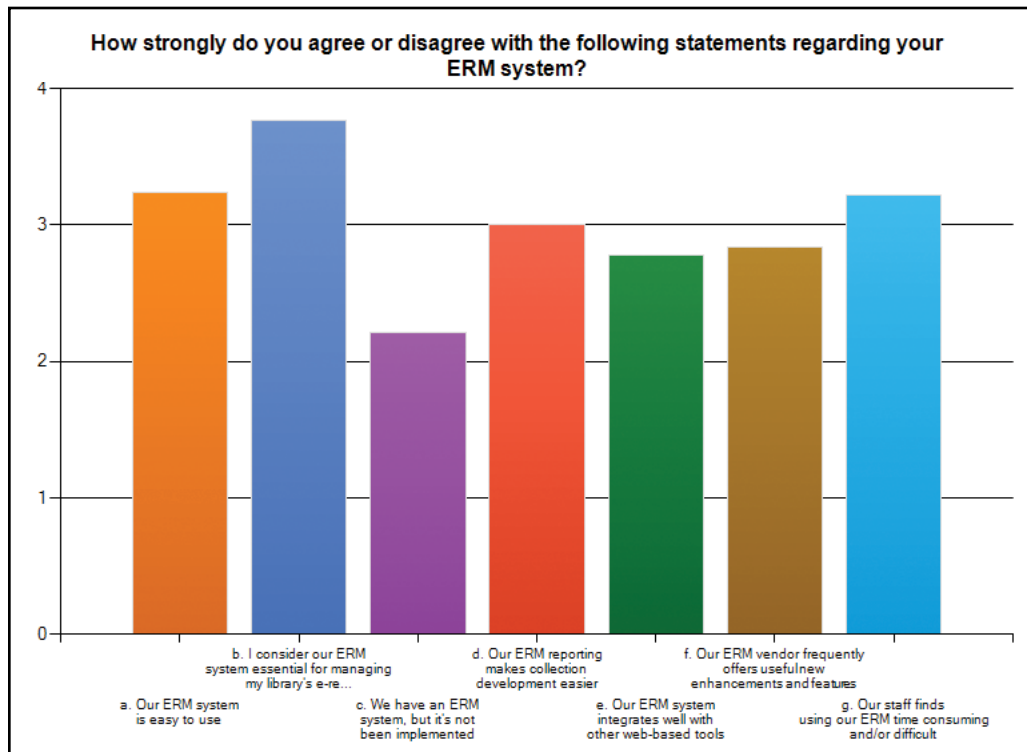
must be entered manually. It’s like the days when we had 40-pound invoices and had to manually key all those records.”

Librarians had many positive comments, too, about how their ERM helps them manage their e-resources, such as “The ERM allows us, as a department, to share and manipulate e-resource related data to reduce duplication of effort and facilitate smoother workflows,” and “The system has improved our ability to successfully manage these resources a hundredfold.” While surveys are often a venue for respondents to note dissatisfaction, we were pleased to find that many librarians took the time also to offer positive feedback, reinforcing that ERM systems can greatly improve e-resource management given the library has enough available staff and time to implement and use the ERM. It appears that the hardest part is the ability to move past data population into true, effective ERM use.

Conclusion

It is important that vendors assist with these problems, creating an ERM product that does not require workarounds and can help librarians move past organizing data in multiple locations such as in spreadsheets, email, and other documents.

One librarian offers what seems to be the general feeling about ERMs today: “Although there are things that could be better, it’s a huge improvement over life before ERM.” Despite some negative experiences, it seems that ERM vendors are offering basic functionality that increases the effectiveness of e-resource management. Librarians may be dissatisfied with some pieces of their ERM, such as reporting functionalities and difficulty in locating license details, but, overall, librarians believe that ERMs are evolving — it’s an ongoing effort between libraries and vendors. Librarians need new features and functionality; the ERM must continue to grow and meet the increasing needs of e-resources as libraries build larger and more diverse electronic collections. 🍄



Another concern with current ERMs pertains to integration with other Web-based tools. Librarians who ranked the effectiveness with which their “ERM system integrates well with other Web-based tools” were primarily neutral (24%), with many of them noting in the open-ended question that their reason for a neutral ranking is a lack of full understanding of what the ERM can do. Twenty-two percent agreed, and 32% disagreed that their “ERM system integrates well with other Web-based tools.” One librarian noted that the ERM “does not eliminate the need to use multiple systems to track e-resource information,” and another offered that the “ERMS functions in modules ... and are not integrated in one system.” This results in “significant duplicate efforts” when maintaining an ERM along with other systems.

Still Room for Improvement

Librarians were candid in their open-ended responses to questions, and we found repeated complaints about the amount of manual data entry

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recently as National Accounts Director at **ABC-CLIO** and National Accounts Manager at **Greenwood Publishing Group**. Congratulations to both **Susie** and **Steve**!

Lulu.com sends news that it is no longer just a place to self-publish and sell works. It’s a place to buy your favorite traditionally published books (or eBooks). **Lulu** just added more than 700,000 new titles to virtual bookshelves in the **Lulu Marketplace** — titles as diverse as **Harlan Coben’s** “Caught” to “Blink” by **Malcolm Gladwell** — in an effort to create the world’s biggest bookstore. **Lulu** is bringing open publishing to all, so that whether you are an author, publisher, educator, etc — and whether you write technical manuals or

romance novels — you have the most opportunities to share and profit from your ideas, knowledge and stories. More power to **Lulu**. The founder is **Bob Young**, <http://lulublog.com/2010/04/12/message-from-bob/>. <http://www.lulu.com/>

The trend for social networking continues. Just read a posting in the *Chronicle of Higher Education* called “Is Your Thesis Hot? Or Not?” There is a graduate student community called **GradShare** <http://www.gradshare.com/landing.html> which allows students to comment on each other’s proposals and to ask questions. This just started and there are already over three thousand active members in the areas of arts, humanities, and linguistics, business, education, engineering, life sciences, physical sciences, and social sciences. Isn’t this social networking wonderful? <Wirecampus@chronicle.com>.

Just returned from the **12th Fiesole Collection Development Retreat** in Leuven, Belgium. What a fantastic place Belgium is. Did you know that they brew at least 700 beers and each beer has a special glass? But, I digress. Lots of informative papers were given. Go to the Website www.digital.casalini.it/retreat.

Speaking of which, the vivacious **Jill Cousins** (Director of **The European Library**, Programme Director of **Europeana** and Executive Director of the **EDL Foundation**) gave us an update on **Europeana** and asked for our input! Did you know that the **Europeana group** comprises a number of projects run by different cultural heritage institutions. All are part-funded by the **European Commission’s eContentplus programme**. Over the next three years these projects will be con-

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