

The Hidden Benefits of Implementing an Electronic Resources Management System

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Over the past decade, the proliferation of digital products and changing modes of access have made managing electronic resources a complicated and arduous task. In recent years, many libraries have created or purchased Electronic Resource Management (ERM) systems to keep track of their online subscriptions and license agreements. The ability to view all information related to a particular resource without having to consult multiple files and spreadsheets is perhaps the greatest benefit of using an ERM system. Furthermore, an ERM system can help eliminate staffing redundancies and duplication of efforts. Additionally, the process of implementing an ERM system may result in other unexpected bonuses. Workflows can be examined more carefully and streamlined where necessary, cataloging problems can be identified and corrected, and most importantly, unlikely partnerships and alliances may be formed between departments within and outside the library. In this paper, the authors illustrate some of the obvious and not-so obvious rewards of implementing an electronic resource management system based on their implementation of Endeavor's Meridian.

In a nutshell, the effective management of electronic resources means getting the right information to the right people at the right time. As the number and methods of accessing electronic products have increased, the management of these resources has become more complex. Prior to ERM systems, electronic resources (ER) managers stored information in a variety of places and formats. In-house databases, spreadsheets, email and paper files were used to store subscription details, passwords, vendor contact information, and license agreements. Unfortunately, in many situations, very few library staff had access to that data.

Information related to the electronic resources to which a library subscribes needs to be disseminated across various library departments, but the type of information needed depends on the staff member. Library selectors, bibliographers, and decision-makers need to know subscription details such as

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content, cost, coverage, subscription period, and instructions for obtaining usage statistics. Acquisitions and serials staff need to know pricing terms and any available discounts affecting other purchases and subscriptions. Cataloging staff need to know when and how a resource can be accessed and dates of coverage. Reference, interlibrary loan, electronic reserves and other public services staff need to be apprised of newly available electronic resources and usage restrictions and rights. In terms of service, contact information is crucial. Staff needs to know whom to contact for subscription questions and technical problems.

According to the Digital Library Federation (DLF), an electronic resource management system should facilitate “management of the information and workflows necessary to efficiently select, evaluate, acquire, maintain, and provide access to e-resources” (Jewell et al. 2004). An efficient electronic resources management system should be a “one-stop shopping” place for all of the disparate pieces of information related to electronic resource subscriptions. Furthermore, an ERM system should streamline workflows and the dissemination of information, thereby eliminating the necessity of re-entering data that already exists in separate systems. The DLF suggests that “such a system [should] support the service requirements of e-resources while building on existing investments in library technology, through seamless interaction and efficient sharing of data with traditional MARC-based online catalogs, Web portals, federated searching tools, local resolution services, local authentication and access-management systems, and traditional library-management functions” (Ibid.).

Implementing an ERM system is a time-consuming and labor-intensive process. The primary objective is to consolidate, into one system, information pulled from a variety of electronic and paper-based sources. The first and most important implementation step is populating the system. Pre-existing data retrieved from the integrated library system and culled from databases, spreadsheets, and other electronic documents may be automatically batch-loaded into the ERM system. The initial data load should include bibliographic and descriptive information, coverage, subscription details, and methods of access. Having this data in one centralized system is an improvement in itself. However, an ERM system is capable of housing much more information.

Meridian, the electronic resource management system developed by Endeavor Information Systems (now Ex Libris), allows users to document features available via the administrator modules of database providers and vendors. Information such as usernames and passwords, authorization method, IP

registration method, registered IPs, number of concurrent users, and availability and location of usage statistics may be noted. Meridian also provides space to store additional information such as the availability of a configurable timeout, exit URLs, support for institutional branding, Z39.50 access, XML gateway, location and availability of MARC records, OpenURL support, special hardware/software requirements, and the location and availability of training and user documentation. Previously, libraries had no place to record this type of information, so it more often than not remained hidden on the vendor's website. The ability to document this information presents the added benefit of discovering the customization options available to subscribers, and provides an opportunity to activate and take advantage of these features.

The most time-consuming and labor intensive aspect of populating an electronic resource management system is the input of terms and conditions from license agreements. Meridian and other commercial ERM systems provide pre-defined fields to document usage rights and restrictions. The capability to store an entire license agreement and link to the full text of terms and conditions housed on vendor websites is also available. An unexpected bonus of performing this task is the opportunity to reexamine licenses and renegotiate undesirable terms. Many license agreements signed in the late 1990s and early 2000s contain restrictive language but in many cases, publishers have updated and reissued licenses with more reasonable and advantageous terms. Renegotiating license agreements is a tedious process and requires more time and work, but attaining improved and favorable usage rights justifies the additional effort.

As stated earlier, managing electronic resources requires the provision of the right information to the right people at the right time. One of the greatest payoffs of implementing an ERM system is the ability to share usage rights and restrictions with the various staff needing this information. Setting permissions to differentiate the amount, type, and presentation of information to different user groups is an added bonus. Meridian uses security profiles and predefined display types to control and restrict what users can see. Security profiles determine information a user can view and what can be done with that information (e.g., read, update, create or delete). Display types determine what information is summarily presented to the user. For example, an interlibrary loan staff login can be limited to viewing only data related to ILL usage rights and restrictions. When displaying the record for a subscription, the first screen displayed contains all of the fields pertaining to interlibrary loan (ILL print/fax, secure transmission, ILL electronic, and record ILL activity). The information presented and the rights and privileges assigned to ILL staff will differ from

those viewed and assigned to electronic reserve or public service logins. Even though an ERM system is a “one-stop shopping” place for electronic resource information, this does not mean that all users should see and have access to all available data. The ability to customize the presentation of information based on user group criteria is an added perk.

Implementing an electronic resource management system forces the establishment of an electronic resource workflow from selection to troubleshooting access problems. Populating an ERM system is a one-time event, but thought must be given to the system’s ongoing updating and maintenance. Establishing a workflow clearly defines who does what when and eliminates staff redundancies. An ERM system centralizes the storage and distribution of electronic resource information but decentralizes its management. The redesigned ER workflow will clearly define who creates and updates ERM system records at each stage of the electronic resource life cycle. The end result is that the ERM system becomes the “central control tower” (Sadeh and Ellingsen 2005, 209) instead of the ER manager in terms of making information available to the appropriate staff and users. Furthermore, electronic resource management systems are less complex and generally much easier to use than the typical integrated library system, requiring very few steps to retrieve data related to ER subscriptions. This ease of use encourages library staff to locate information on their own rather than relying on the ER manager to provide needed information.

Another unexpected benefit of implementing an ERM system is the opportunity to clean up bibliographic data. Libraries that have not implemented a quality control program will have the chance to do so during the course of populating the ERM system. Discrepancies between the information in the library catalog and other locations, such as an A-Z list, may be identified and corrected (e.g., different URLs, journal titles, or holdings information). It is also possible that items in the ERM system have never been cataloged. Populating the ERM system allows the clean-up of records so that there is consistency between the electronic resource management system and the catalog. Cataloging staff will also gain a better understanding of the different functions of publishers and vendors because the ERM system allows publisher and vendor information to be displayed along with bibliographic information rather than being hidden in a different module as is the case with integrated library systems.

Implementing an ERMS can provide the opportunity for staff to learn new technologies. A project management system, which may include features such as a wiki, roadmap, timeline, and ticketing support, will enable staff to easily track

the progress of populating the ERM system and other related activities. Another unforeseen benefit is the improvement of relationships between staff in various library departments and the formation of new alliances and partnerships. Populating the electronic resource management system requires staff from different departments to work closely together. Working together allows staff to see the “big picture” and provides an opportunity for everyone to see how all of the pieces related to electronic resource management fit together. Instead of concentrating on one piece of the electronic resource management puzzle, staff gains an understanding of and respect for the nature of each others’ work. The end result is an improved relationship between staff members.

Opportunities for outreach will increase as the ERM system is introduced to library staff not involved with the implementation. This outreach may also extend beyond the library. Implementing an electronic resource management system allows the controlled provision of subscription information to non-library staff. On university campuses, there may be a need to supply data to the staff of academic departments involved with preparing course syllabi and requesting electronic reserves. Logins for departmental staff may be created and assigned. Information accessible to these logins can be restricted to usage rights, electronic reserve/course pack restrictions, and URL/linking protocols. Additionally, logins permitting access to license agreements may be created for staff in the university’s general counsel’s office.

The implementation of an ERM system can improve and streamline a library’s selection, evaluation, acquisition, and maintenance of electronic resources. The centralization of information is perhaps the greatest benefit. Better-defined workflows, catalog clean-up, and the forming of new alliances, however, are just a few of the hidden rewards that can occur along the way.

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