

Electronic Resource Management (ERM)



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Electronic Resources

Prominent role in R&D

Different Characteristics

Broad & complex

Not managed well

Different management principles

Outline



E-resources in the library



Electronic Resource Management (ERM)



ERM and its lifecycle



Need and current global scenario



ERMS

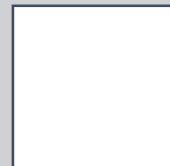
Learning Outcome



To understand the lifecycle of an electronic resource



To understand the management of electronic resources globally



To get an overview about Electronic Resource Management System (ERMS)

Journey of Resources

Changing nature of resources

Wider role of information

Development of information handling entities

Technological influence

Wider transformation

Why E-resources

Shifting of publications

Various advantages of electronic resources over print resources

Influence of emerging formats

Influence of ICT and portable devices

Print Versus Electronic

Access versus Holding

Nature (Various Types And Formats)

Licensing

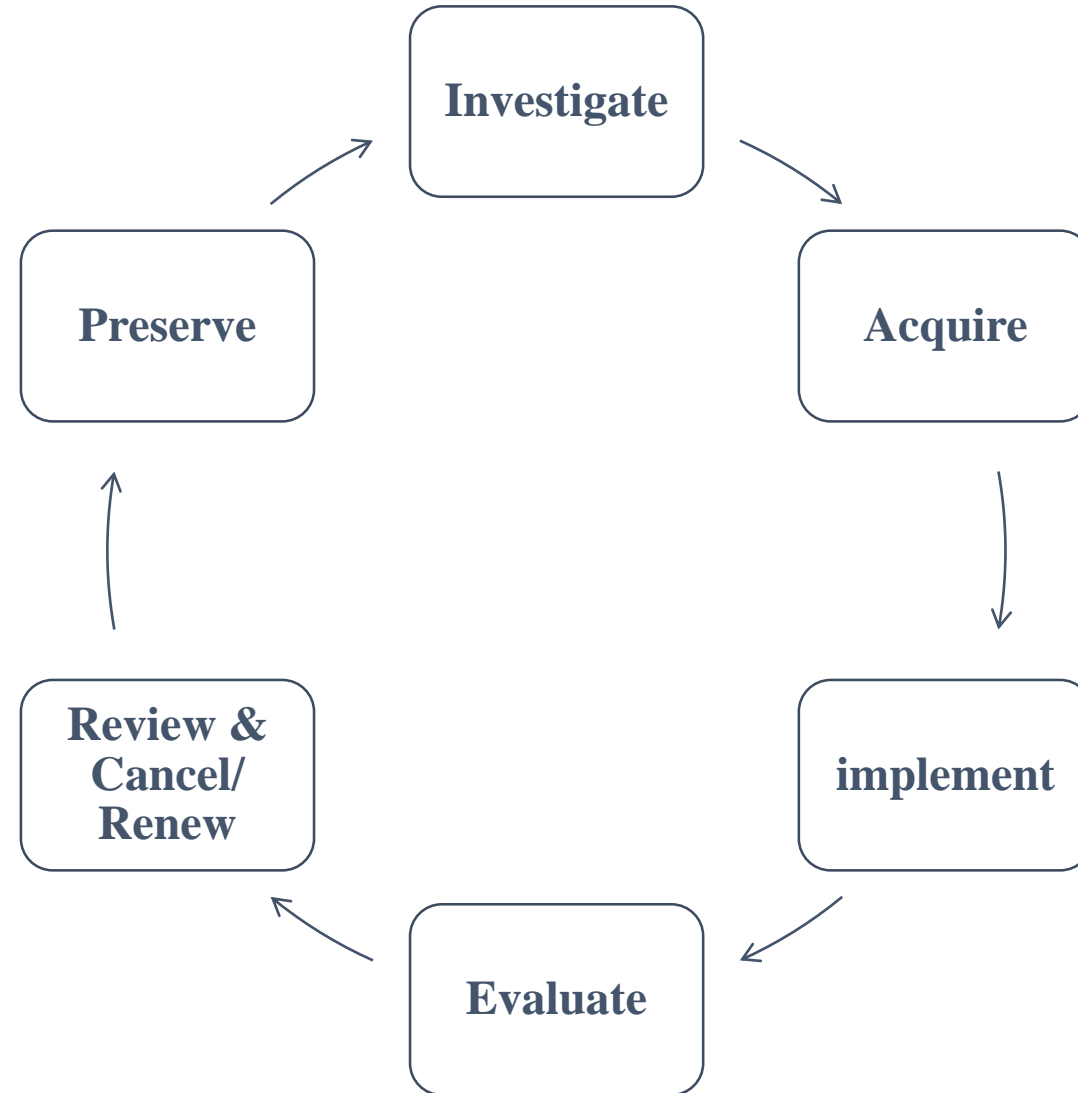
Complex Life Cycle

Preservation

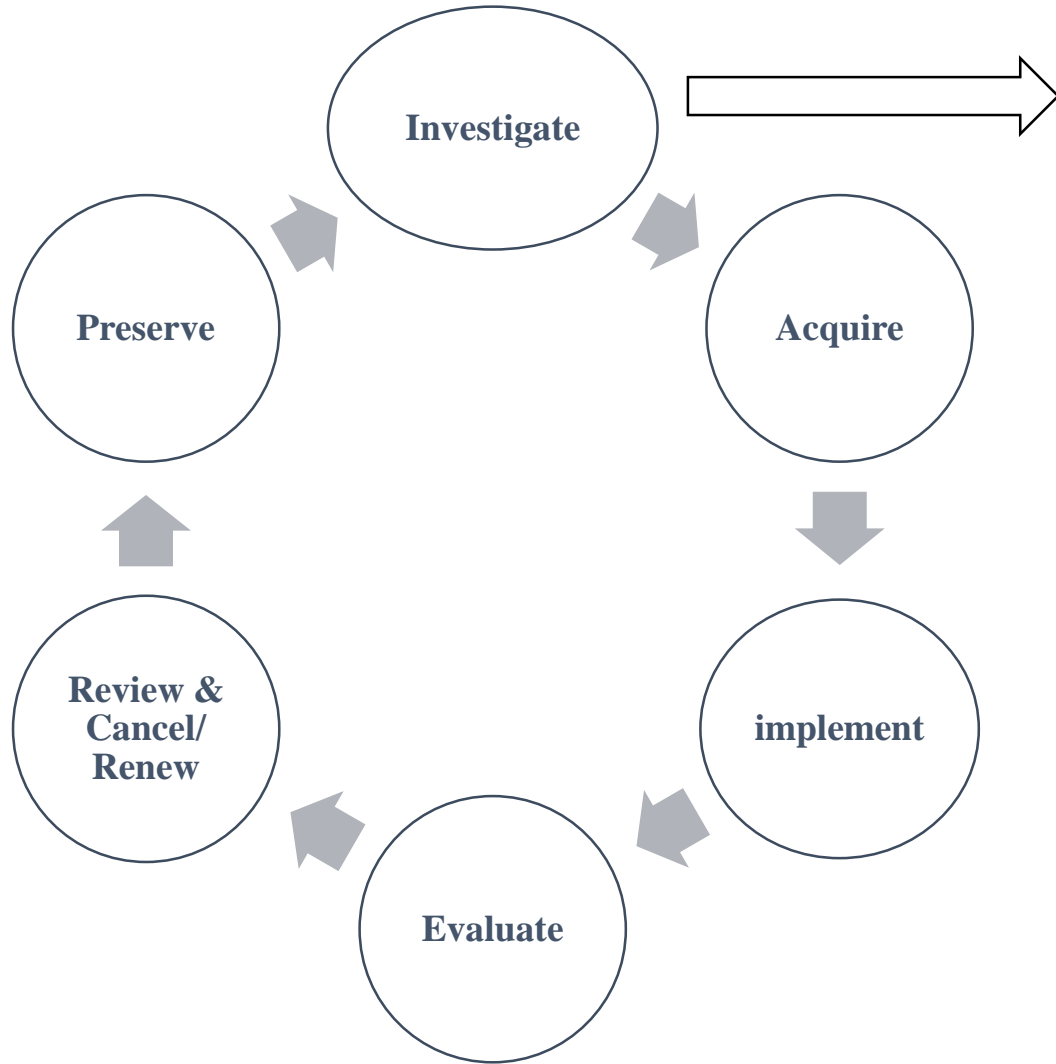
Electronic Resource Management

Electronic Resource Management (ERM) covers practices and techniques involved in the investigation, selection, acquisition, licensing, access, maintenance, evaluation, retention, and preservation of electronic resources of a library.

Lifecycle of Electronic Resource...

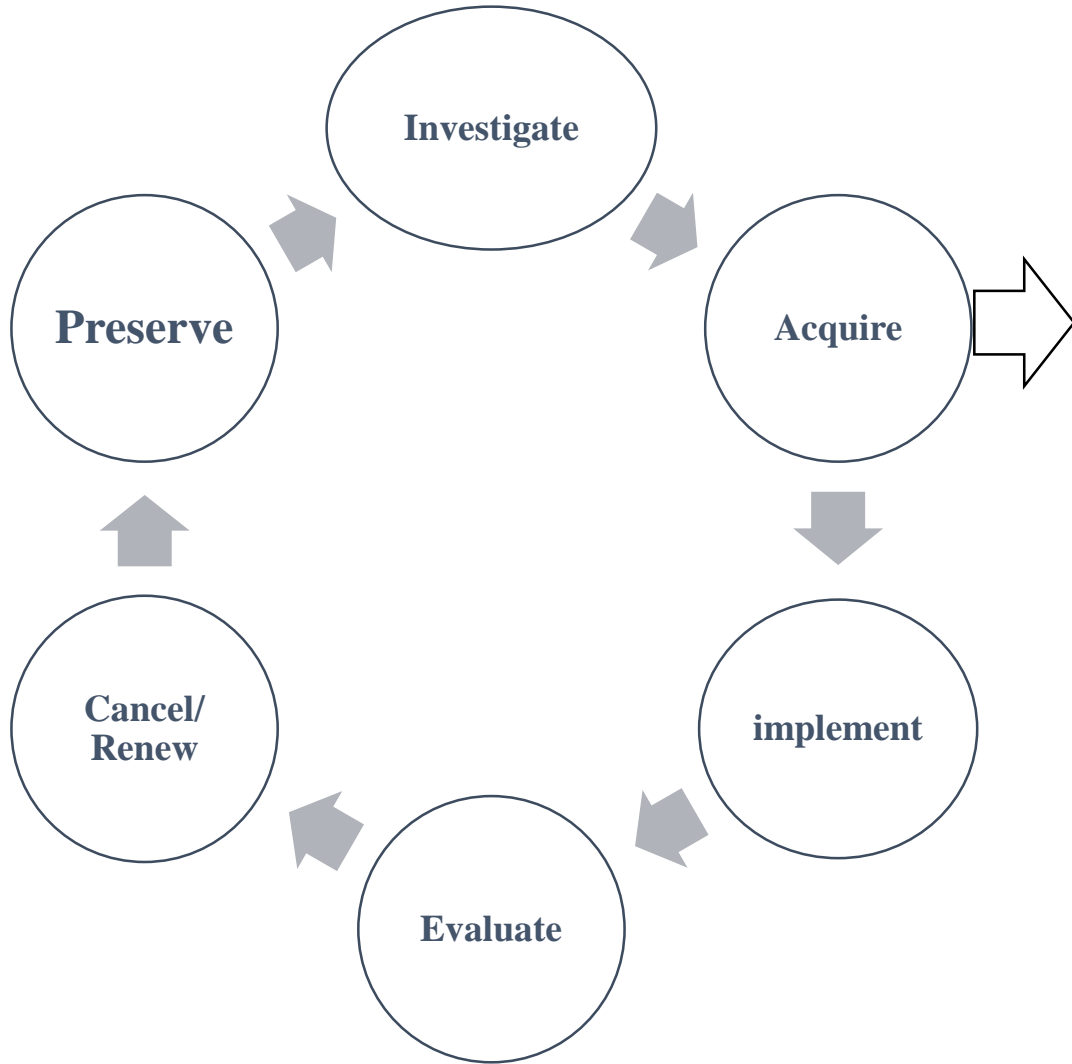


Lifecycle of Electronic Resource...



Know the potential users	Do a Review of Market and Literature
Talk to Suppliers	Sustainability Check
Overlap Analysis	Platform choice (publisher/aggregator)
Trial Set-Up and feedback mechanism	Documentation

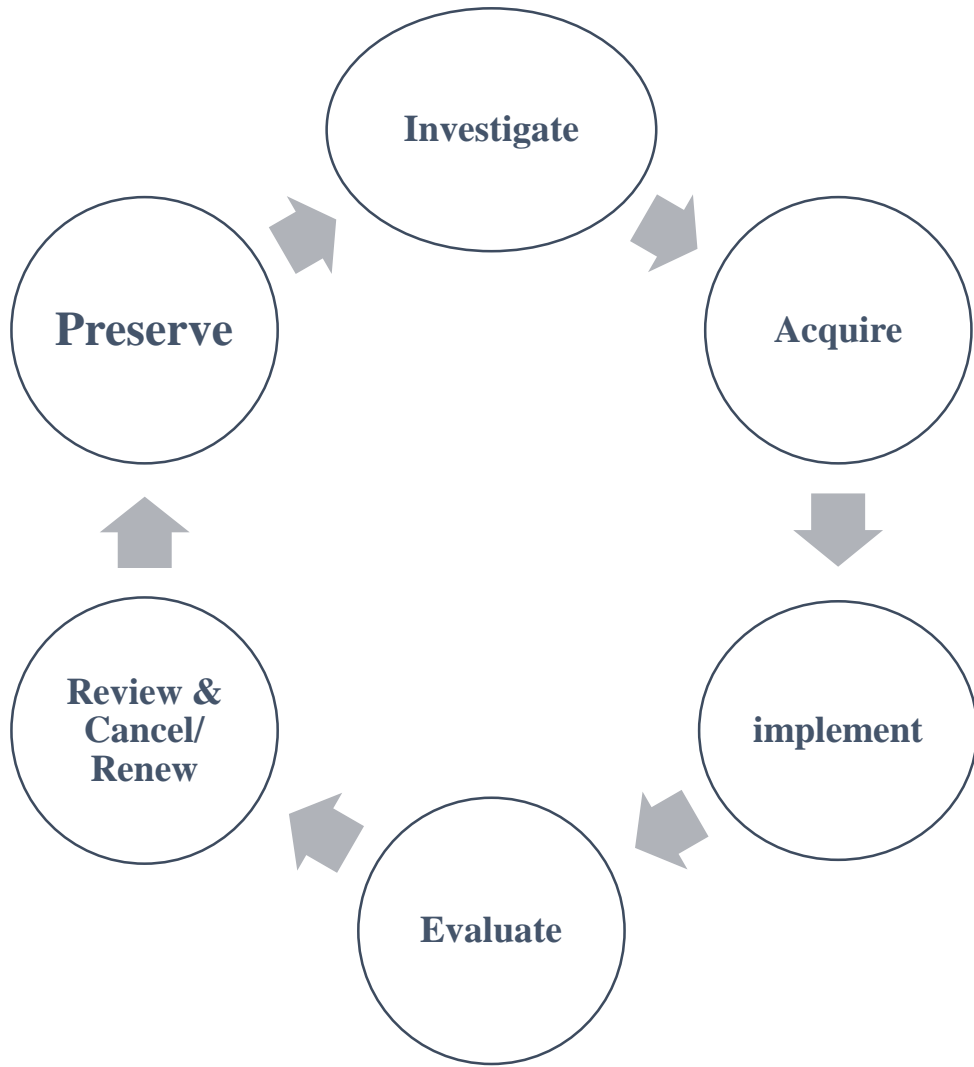
Lifecycle of Electronic Resource...



See details specifications	Negotiate for pricing
Negotiate, review and sign License	Order & Ask for Metadata

Definition of site	Definition of Users
Remote Access Provision	IP authentication
Article-level linking	Mutual indemnification
Privacy clauses	Provision of usage statistics
Content transfer	third party discovery tools provision
Perpetual access clause (LOCKSS, CLOCKSS, Portico)	Jurisdiction
Auto Renewal clause	Price cap allowances
Platform Fee	DRM issues

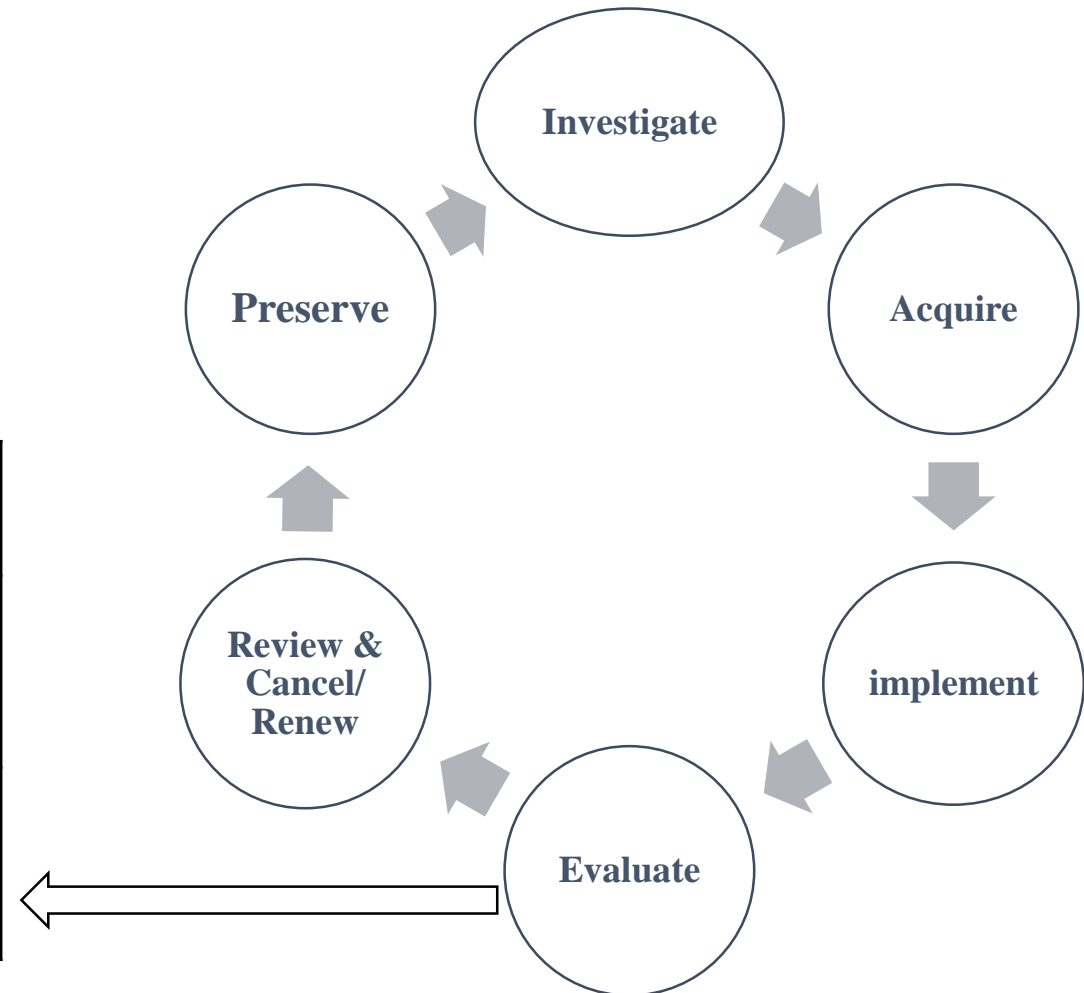
Lifecycle of Electronic Resource...



Access catalogue Discovery Website links A to Z lists	Admin module Trouble shoot Problem log HW/SW needs
Marketing email/circular etc.)	Holdings lists preparation
Periodic check	URL Maintenance
Remote login check	Feedback mechanism

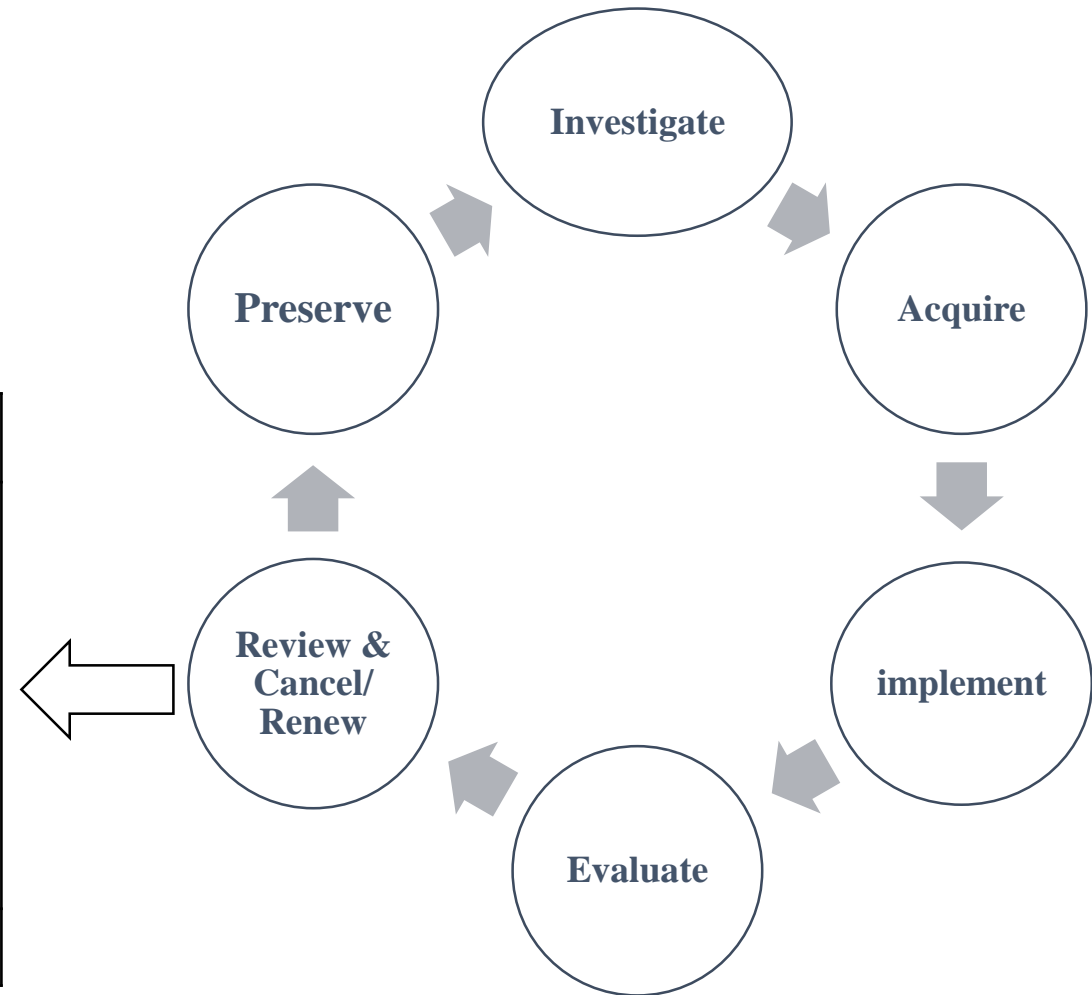
Lifecycle of Electronic Resource...

Periodic access check report analysis	Downtime & problem log analysis
Supplier's communication analysis	Analysis of users' feedback/evaluation
Usage statistics analysis & cost calculation	Look for any change of coverage/platform migration



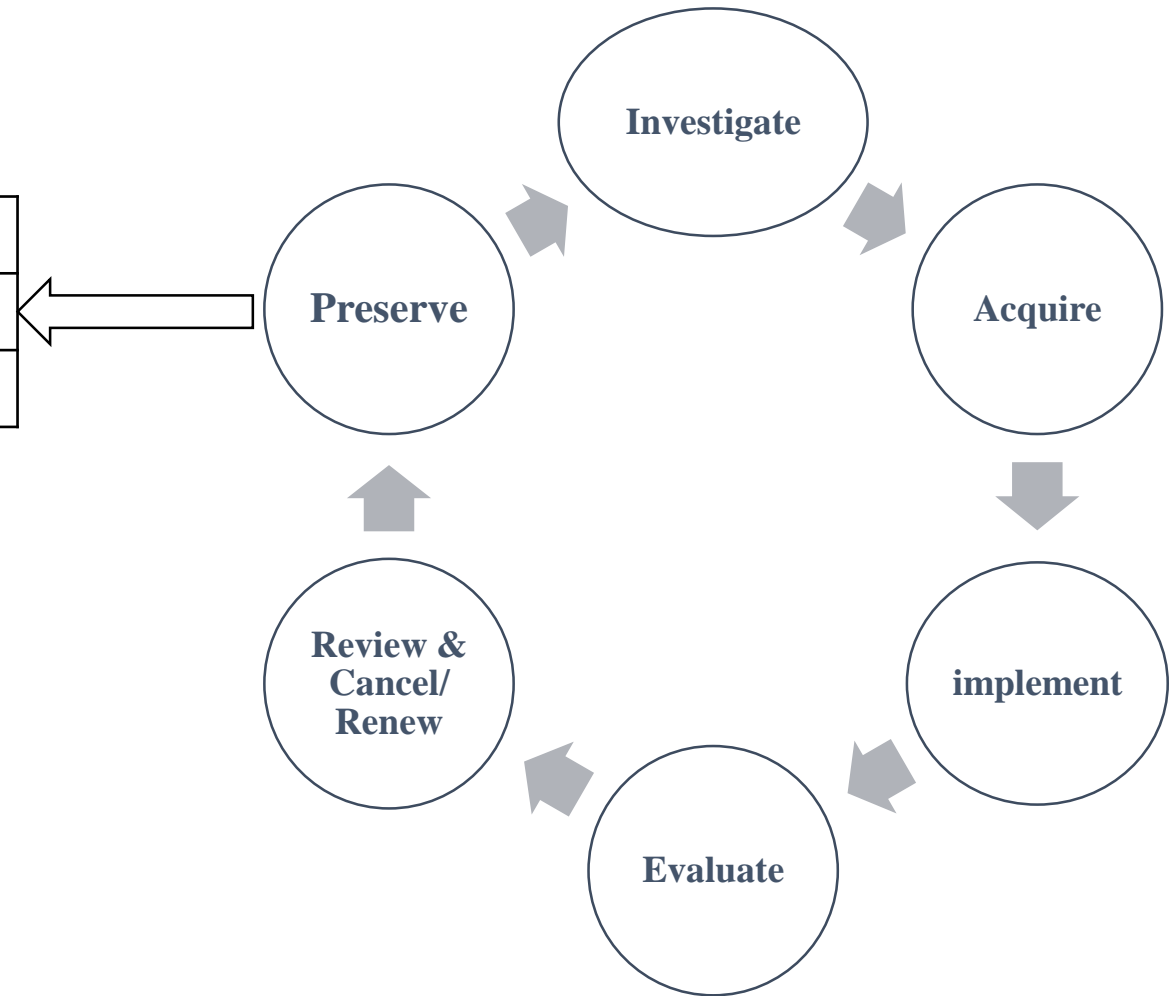
Lifecycle of Electronic Resource...

If cancel then preserve
If Renew, then review for: Licence term changes Pricing change DRMs Fund available Holding change in case of database Open access availability
If renewed, the lifecycle repeats



Lifecycle of Electronic Resource

See LA provisions	LOCKSS
CLOCKSS	Portico
Local server	Any other means



ERM: Global Scenario

- Digital collection development: greatest source of anxiety and uncertainty
- Multiple systems/processes used for ERM:
 - More than 30 additional tools are used to manage Electronic resources
 - Paper files, Spreadsheets, staff web pages, small databases, SFX, and ILS, A–Z lists etc.
- Majority of the library professionals use e-mail for recording, tracking, and archiving problems.
- Most of the libraries are not following the detailed workflows
- LSPs have gap to accommodate ERM workflow
- A more flexible, holistic approach is required for ERM.

Need For ERMS

Nature of e-resources

Fragmented approach to ERM

Library spends large sum of money on electronic resources

Incapability of ILS and LSP in handling ER workflow

For getting meaningful metrics

To save the time

Electronic Resource Management System: ERMS

A system that supports management of the information and workflows necessary to efficiently select, evaluate, acquire, maintain, and provide informed access to electronic resources in accordance with their business and license terms.

ERMS: Core Capabilities

- Capability to manage custom workflows and communications,
- Capability to track renewals and cancellations,
- Capability to upload files for licenses,
- Be interoperable,
- Allow export and import,
- Be easy to use and navigate,
- Preferably web-based,
- Have different levels of user permissions,
- Have the ability to store administrative information

ERMS: Basic Data Elements

Descriptive

Licensing

Financial

Administrative and Support

Access

Analysis Of Major ERMS

I do not have direct experience with any product except CORAL. The review is based on the information available on the website of these products. It is by no means comprehensive and should not be taken as the final word on any of these systems or vendors. It is not the complete list or a complete review of any of these products, but an attempt to get users familiarize with some ERMSs.

ERMS

- EBSCO ERM Essentials

https://www.ebscohost.com/promoMaterials/EBSCONET_ERM_Essentials_Factsheet.pdf

- 360 Resource Manager

<https://www.proquest.com/products-services/360-Resource-Manager.html>

- CORAL

<http://coral-erm.org/>

EBSCO ERM Essentials

➤ Company: EBSCO

➤ Features:

➤ Get single-click access to e-resource data

➤ Create reports

➤ Keep track of trials

➤ Simplify renewals

➤ Streamline workflow

➤ Customize fields

➤ Auto-populated data field

360 Resource Manager

➤ Company: ProQuest

➤ Features:

➤ Consolidate and organize subscription data

➤ Improve reporting and analysis

➤ Share or inherit resources and metadata

➤ Streamline acquisition and licensing workflows

➤ Help make better collection decisions

➤ Enable rapid implementation and use of an ERM

Coral

- Open Source Software; Not proprietary to any company
- Modules:
 - Resources
 - Licensing
 - Organisation
 - Usage Statistics
 - Management

Challenges Of ERM

Complex lifecycle

Availability in various forms and formats

Dynamic nature

ILS and LSP not able to manage

Consortia versus individual approach

Conclusion

- Global shift in the publications and acquisition
- A system is needed to manage electronic resources
- The system should support the existing library systems
- Should be cost effective.

Disclaimer

I duly acknowledge the scholars and the website content providers whose materials are used in my presentation.

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THANK YOU

