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
<table>
<thead>
<tr>
<th>Print Versus Electronic</th>
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<tbody>
<tr>
<td>Access versus Holding</td>
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<tr>
<td>Nature (Various Types And Formats)</td>
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<tr>
<td>Licensing</td>
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<tr>
<td>Complex Life Cycle</td>
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<tr>
<td>Preservation</td>
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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…

- Investigate
- Acquire
- Preserve
- Evaluate
- Review & Cancel/Renew
- implement
Lifecycle of Electronic Resource...

- Investigate
  - 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

- Acquire

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Lifecycle of Electronic Resource...

Investigate

Acquire

Preserve

Cancel/Renew

Implement

Evaluate

<table>
<thead>
<tr>
<th>See details specifications</th>
<th>Negotiate for pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Negotiate, review and sign License</td>
<td>Order &amp; Ask for Metadata</td>
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<table>
<thead>
<tr>
<th>Definition of site</th>
<th>Definition of Users</th>
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<tbody>
<tr>
<td>Remote Access Provision</td>
<td>IP authentication</td>
</tr>
<tr>
<td>Article-level linking</td>
<td>Mutual indemnification</td>
</tr>
<tr>
<td>Privacy clauses</td>
<td>Provision of usage statistics</td>
</tr>
<tr>
<td>Content transfer</td>
<td>third party discovery tools provision</td>
</tr>
<tr>
<td>Perpetual access clause (LOCKSS, CLOCKSS, Portico)</td>
<td>Jurisdiction</td>
</tr>
<tr>
<td>Auto Renewal clause</td>
<td>Price cap allowances</td>
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<tr>
<td>Platform Fee</td>
<td>DRM issues</td>
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</tbody>
</table>
Lifecycle of Electronic Resource...

<table>
<thead>
<tr>
<th>Lifecycle Stage</th>
<th>Activities</th>
<th>Support Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investigate</td>
<td>Access catalogue</td>
<td>Admin module</td>
</tr>
<tr>
<td></td>
<td>Discovery</td>
<td>Trouble shoot</td>
</tr>
<tr>
<td></td>
<td>Website links</td>
<td>Problem log</td>
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<tr>
<td></td>
<td>A to Z lists</td>
<td>HW/SW needs</td>
</tr>
<tr>
<td>Acquire</td>
<td>Marketing email/circular etc.)</td>
<td>Holdings lists preparation</td>
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<tr>
<td></td>
<td>Periodic check</td>
<td>URL Maintenance</td>
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<tr>
<td>implement</td>
<td>Remote login check</td>
<td>Feedback mechanism</td>
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<tr>
<td>Evaluate</td>
<td></td>
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<tr>
<td>Preserve</td>
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<tr>
<td>Review &amp; Cancel/Renew</td>
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Lifecycle of Electronic Resource…

<table>
<thead>
<tr>
<th>Periodic access check report analysis</th>
<th>Downtime &amp; problem log analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier’s communication analysis</td>
<td>Analysis of users’ feedback/evaluation</td>
</tr>
<tr>
<td>Usage statistics analysis &amp; cost calculation</td>
<td>Look for any change of coverage/platform migration</td>
</tr>
</tbody>
</table>

Acquire → Acquire → Evaluate → Review & Cancel/Renew → Preserve → Investigate → Acquire
Lifecycle of Electronic Resource…

<table>
<thead>
<tr>
<th>If cancel then preserve</th>
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<tbody>
<tr>
<td>If Renew, then review for:</td>
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<tr>
<td>Licence term changes</td>
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<tr>
<td>Pricing change</td>
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<tr>
<td>DRMs</td>
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<tr>
<td>Fund available</td>
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<tr>
<td>Holding change in case of database</td>
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<tr>
<td>Open access availability</td>
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<tr>
<td>If renewed, the lifecycle repeats</td>
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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

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<tr>
<td>See LA provisions</td>
<td>LOCKSS</td>
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<tr>
<td>CLOCKSS</td>
<td>Portico</td>
</tr>
<tr>
<td>Local server</td>
<td>Any other means</td>
</tr>
</tbody>
</table>

- Investigate
- Acquire
- Implement
- Evaluate
- Review & Cancel/Renew
- Preserve
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.
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
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.
• EBSCO ERM Essentials

• 360 Resource Manager

• 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.


References

THANK YOU