

# Diving into the Deep End: What Millennium ERM can do to help you reduce the stress of managing electronic resources

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# Why get an ERM?

- Libraries are spending more money on electronic resources than ever before.
- Libraries are buying a wide variety of e-things: databases, e-journals, e-books, e-reference collections, e-journal backfiles, archives, datasets, multimedia collections (streaming audio, streaming video), etc.
- These things are more complicated than print resources.
- The traditional ILS is increasingly less useful in managing electronic resources.

# ER information in a lot of places

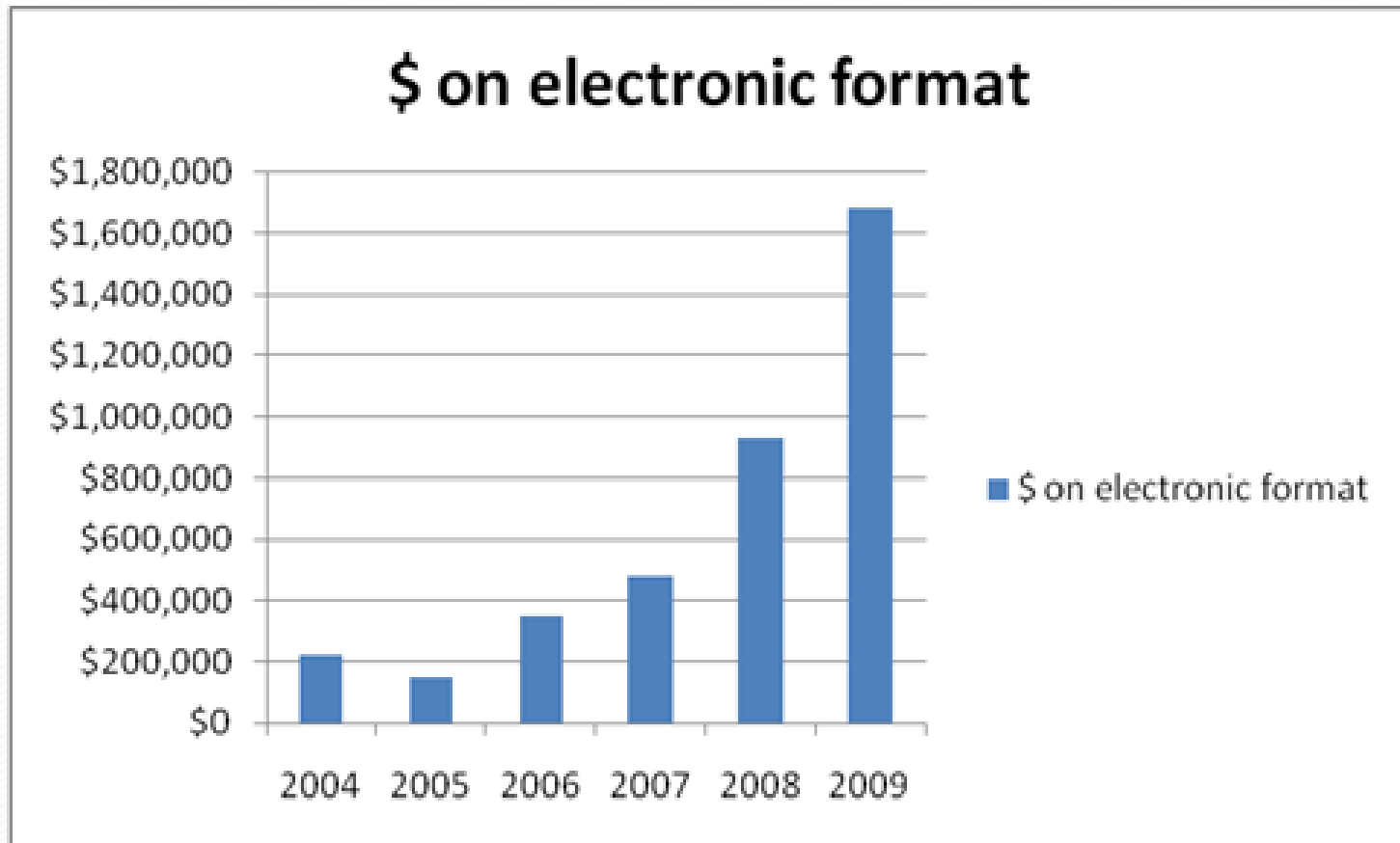
- Some information in ILS order records.
- License information in paper (filing cabinet).
- Usage information in spreadsheets.
- Management information in emails, Outlook calendar/tasks, etc.
- Description/access through library website, catalog, etc.
- Microsoft Access database, Word documents.

# ERM to the rescue?

“Electronic Resource Management (ERM) software is developed for the specific purpose of managing a library’s electronic resource collections and subscriptions. ERM systems, which can be either standalone or directly tied to a library system vendor’s other modules, usually track the life cycle of an electronic resource. This can include management areas such as: access, acquisitions, licensing, cost, invoicing, workflow, trial use of electronic products, and resource usage.”<sup>1</sup>

*NISO - SUSHI FAQs: Content Providers & Consolidators (<http://www.niso.org/workrooms/sushi/faq/provider>). Accessed April 26, 2010.*

# UMKC Libraries ER expenditures

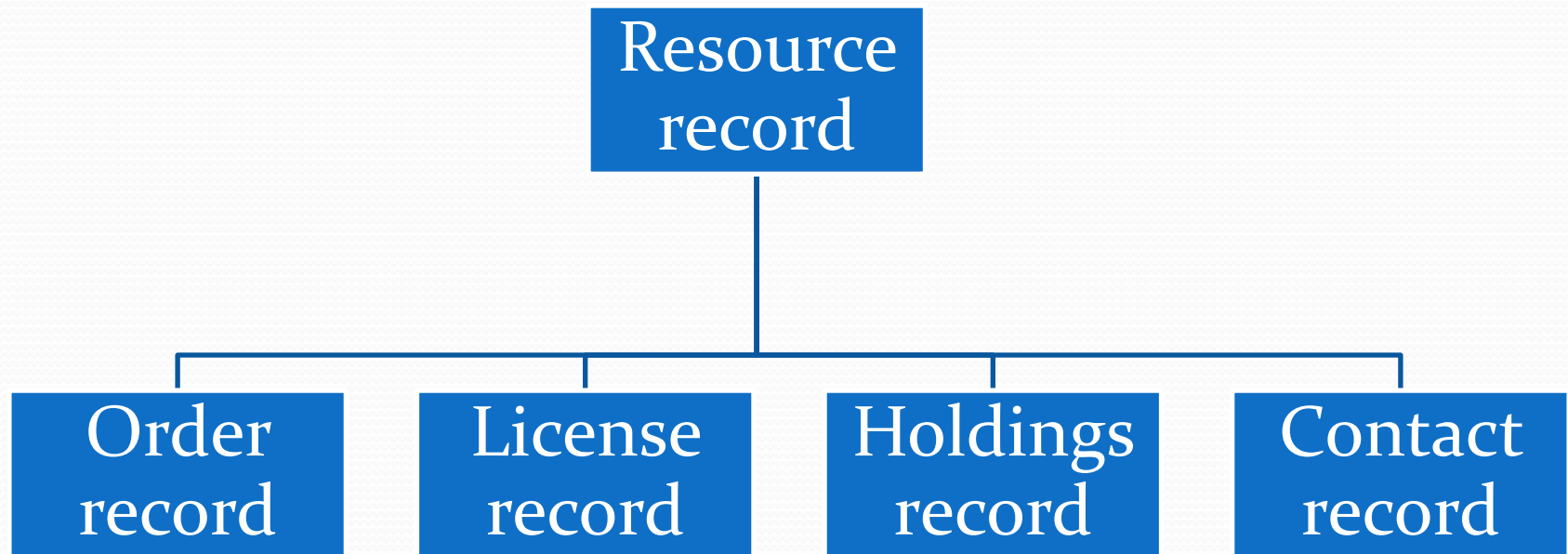


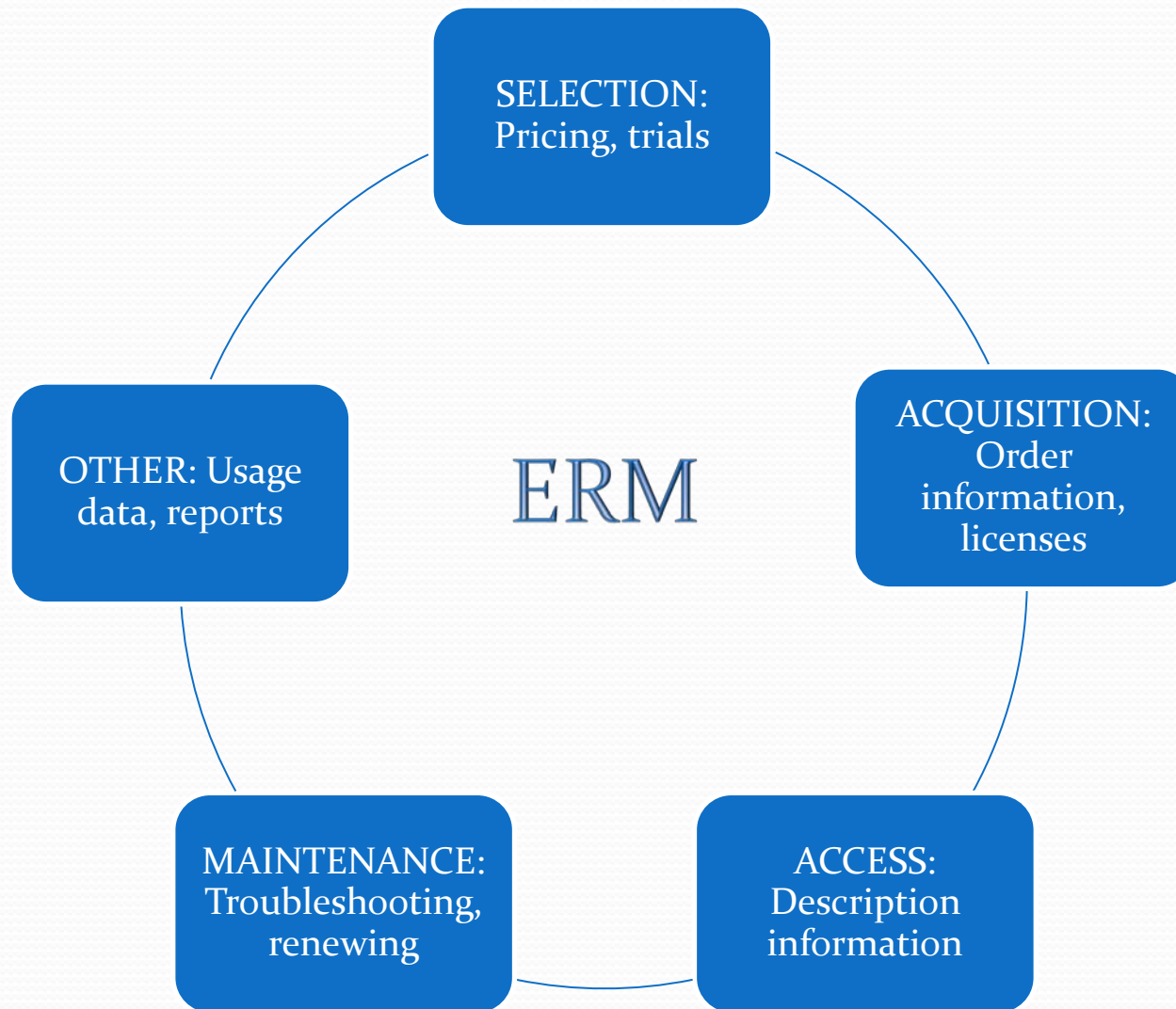
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# ERM and UMKC

- Fall 2007 – Should we get an ERM?
- Spring 2008 – Purchased Innovative's ERM.
- Fall 2008 – Innovative 3-day training. ERM implementation team goes to work.
- Summer 2009 – Data from library website migrated into ERM. ERM procedures finalized. We start using ERM on the staff side.
- Spring 2010 – ERM webpac pages implemented and integrated into library website.
- Summer 2010 – ERM license records.

# Records used by ERM





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# Pricing information

- We create a brief ERM record when we get pricing information for an electronic resource:
  - Name of resource and vendor
  - Department code
  - Requester in Liaison field
  - Status = 'p' for pending
  - Staff note with pricing (PRICING: \$7,700/year. 5/4/2010).  
Other staff notes with relevant information
- We can then run a report upon request and export the information into a spreadsheet for review.
- Records given a status of 'r' for rejected if we elect not to purchase resource.

# Wishlist report

RESOURCE	CREATED	DEPARTMENT	VENDOR	LIAISON	STAFF NOTE
Foreign Broadcast Information Service Daily Reports, 1941-1996	3/25/2010	Interdisciplinary	Readex	Angolia	PRICING: All Regions, 1974-1996: \$\$ + \$\$ /year. All Regions, 1941-1974: \$\$ (Less Pre-publication discount (\$\$) = New initial fee through June 15th, 2010 \$\$) + \$\$ /year. Combination discount: an additional X% discount will be applied with a concurrent purchase of the collections. Note 1: Unlimited users and remote access allowed. 3/25/10 BP
Fulltext Sources Online (FSO)	3/19/2010	Interdisciplinary	Information Today, Inc.	Zhuo	PRICING: \$\$ /year for unlimited users, single-site license. 3/23/10 BP
HeritageQuest Online	2/10/2010	History	Proquest	Hunter	PRICING: \$. A X% discount is applied automatically if UMKC were to subscribe to BOTH of these resources. (Ancestry Online Library Edition).
Jazz Music Library	2/10/2010	Conservatory	Alexander Street Press	Green	PRICING: \$\$ /year for unlimited users (SPECIAL OFFER). 2/8/10 BP
Proquest Black Studies Center	3/17/2010	Interdisciplinary	Proquest	Alleman	PRICING: \$ one-time + \$ on-going = \$ first year.
Research Insight - Compustat Global	4/28/2010	Administration	Standard & Poor	Le Beau	PRICING: \$ /year.
Sabin Collection of Americana, 1500-1926	3/25/2010	History	Gale Cengage	Alleman	PRICING: Order by June 15: ONE-TIME EXPENDITURE - Collection \$, ONE-TIME EXPENDITURE - MARC Records \$, ANNUAL EXPENDITURE - Hosting Fee \$. 3/25/10 BP"
ScienceDirect 2009 Clinical Medicine eBooks Collection	2/24/2010	Medicine	Elsevier	Mullaly-Quijas	PRICING: 2000-2007 \$; 2008 \$; 2009 \$; 2010 \$. 2/24/2010
Springer Protocols	3/17/2010	Medicine	Springer	Mullaly-Quijas	PRICING: SP Archive: \$ (one time purchase) includes all content from Vol. 1 - 2009 / SP 2010 content: \$ (yearly subscription).
Twentieth-Century American Poetry, 2nd Edition	3/5/2010	English	Proquest	Muth	PRICING: The cost for this resource is \$ one-time + \$ on-going for a total of \$ your first year. 3/5/10 BP
Vault.com	2/8/2010	Administration	Vault.com	Le Beau	PRICING: \$ - just under 10,000 FTE. New pricing is \$ (X% discount before March 15, 2010 to \$).

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# Trials

- Date fields allow us to track trial start and end dates. Resource has status 't' for trial.
- “Trial databases” subject allows us to list all of the trials on website.
- Trial information field is used to store trial feedback from users and staff.
- Can run reports to see what trials are in process, which ones have ended.
- Can export trial feedback information into a spreadsheet for review.

# Trial databases list

Trial Databases	
<b><u>American Antiquarian Society Historical Periodicals Collection, Series 1 (UMKC users only)</u></b>	<a href="#">About Resource</a>
This collection encompasses the five series created from periodical holdings belonging to the repository of the American Antiquarian Society. The entire AAS collection features about 6,500 titles from the seventeenth through the late nineteenth century. This trial includes the first series covering publications dating from 1693 through 1820.	
Access available through June 30, 2010. Please use the <a href="#">Trial Database Comment Form</a> to tell us what you think.	
<b><u>American Antiquarian Society Historical Periodicals Collection, Series 2 (UMKC users only)</u></b>	<a href="#">About Resource</a>
This collection encompasses the five series created from periodical holdings belonging to the repository of the American Antiquarian Society. The entire AAS collection features about 6,500 titles from the seventeenth through the late nineteenth century. This trial includes the the second series covering 1821 through 1837.	
Access available through June 30, 2010. Please use the <a href="#">Trial Database Comment Form</a> to tell us what you think.	
<b><u>RILM Abstracts of Music Literature on CSA Illumina (UMKC users only)</u></b>	<a href="#">About Resource</a>
Music and musicology.	
Access available through May 7, 2010. Please use the <a href="#">Trial Database Comment Form</a> to tell us what you think.	
<b><u>RILM Abstracts of Music Literature on EBSCOhost (UMKC users only)</u></b>	<a href="#">About Resource</a>
Music and musicology.	
Access available through May 5, 2010. Please use the <a href="#">Trial Database Comment Form</a> to tell us what you think.	
<b><u>RIPM (Retrospective Index to Music Periodicals) on EBSCOhost (UMKC users only)</u></b>	<a href="#">About Resource</a>
19th Century music.	
Access available through May 5, 2010. Please use the <a href="#">Trial Database Comment Form</a> to tell us what you think.	

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# Order information

- Order record used for financial information (price, order date, vendor, etc.).
- Order record linked to ERM resource record as “related” order.
- ERM record status = ‘o’ for on order.
- Weekly “on order” reports are reviewed to track orders in progress. Emailed out to appropriate library staff.

# Licenses

- When license has been signed by campus purchasing, license template is created with fields for:
  - Authorized users
  - Authentication method
  - Terms of use
  - Reserves restrictions (custom field)
  - ILL restrictions (custom field)
- Template then be used to “clone” license records for all resources covered by license.
- Select fields display to public to inform both library users and staff.
- Can also export fields to a spreadsheet for library staff (e-reserves, ILL).

# Sample license

- computer hardware
- programming
- computational theory
- mobile computing
- web technologies
- information systems
- information science
- artificial intelligence
- computer graphics
- computer-human interaction
- accessibility and computing
- computing education
- computers and society

[List of journals included in the ACM Digital Library.](#)

This database also provides access to *The Guide to Computing Literature*, which indexes scholarly journals and popular magazines (350), books, conference proceedings, and dissertations/theses from over 3000 publishers in all areas of computer science. It includes full-text book reviews from the last two years.

**Features:** Alerts, Truncation \*

**Maximum users:** Unlimited

**Description updated:** June 17, 2008 -- RP

<b>Vendor</b>	Association for Computing Machinery
<b>Provider</b>	MERLIN Consortium
<b>Database Subject</b>	Computer Science & Electrical Engineering Science and Technology

<b>Authorized Users</b>	Faculty, students, staff, walk-ins.
<b>Authentication Method</b>	Campus IP. Off-campus access is available. <a href="#">Connecting from off-campus</a>
<b>Terms of Use</b>	Electronic resources are available to UMKC students, faculty, staff, and library users in accordance with the publisher's license terms and conditions. In general users MUST use the resources for personal, educational, or research purposes only. Users MUST NOT systematically download or copy large amounts from these resources NOR sell or otherwise make commercial use of these resources. If you have a question regarding the use of one of the library's electronic resources please <a href="#">contact us</a> (phone (816) 235-1526).
	Faculty members are allowed to use copyrighted material for classroom/educational use.
<b>Reserves Restrictions</b>	Use persistent URLs to link to resources for class use. Call 816-235-1526 if you need assistance.
<b>ILL Restrictions</b>	ILL via mail, fax or secure FTP (Ariel, etc.)

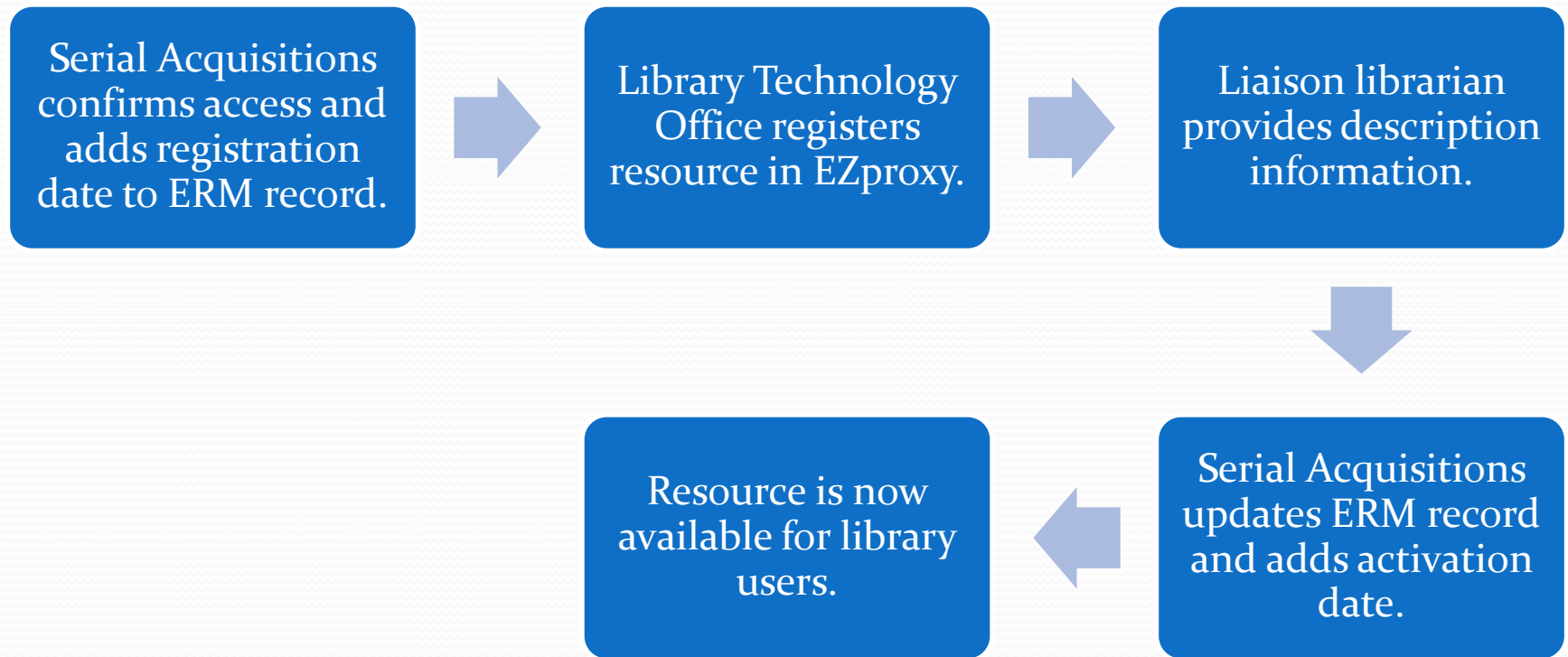
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# Access information

- Before ERM, UMKC relied on Drupal content management system to provide list of databases on library website.
- Disconnect between managing the resource and providing access to the resource. ERM provides one place to do both things.
- Centralizing tasks makes it easier to track new resources that are still in process and to manage changes to existing databases.



# Workflow for new databases



# How ERM helps with this process

- Weekly “registered, not yet active” reports are run to track resources that are still in process.
- Registration date used to track when access was confirmed.
- URL indicates whether resource has been proxied or not.
- Liaison field indicates which subject librarian is responsible for description.
- Activation field indicates whether resource is live or still in process.

# Description information

- Description template was designed in Drupal for website. Template contained numerous fields (access, coverage, general description, features).
- Limited number of fields in ERM record resulted in grouping some of the Drupal fields into a single ERM field.
- Makes editing the description challenging at times.

# Description (public side)

## AccessScience (UMKC users only)

### **Description**

**Coverage:** Full text

**Access:** Access is restricted to UMKC students, faculty, and staff. [Connecting from off-campus](#)

**Description:** This comprehensive science encyclopedia contains 8500+ articles and research updates, 110,000+ dictionary definitions, and 2000+ biographies of scientists. In addition it contains images, science news, videos, and Flash animations. It has special sections on Nobel Prize and Field Medal winners and an interactive periodic table and geologic time scale. It includes the following titles and is updated regularly:

- McGraw-Hill Encyclopedia of Science & Technology, 10th Edition
- McGraw-Hill Yearbook of Science & Technology, current
- McGraw-Hill Dictionary of Scientific and Technical Terms
- Hutchinson Dictionary of Scientific Biography

**Features:** Alerts, study guides

**Maximum users:** Unlimited

**Description updated:** June 12, 2009 - RP

### **Vendor**

McGraw-Hill

### **Provider**

UMKC University Libraries

### **Database Subject**

Biological Sciences

Chemistry

Computer Science & Electrical Engineering

Engineering

Environmental Studies

Geosciences and Geography

Mathematics and Statistics

Physics and Astronomy

Science and Technology

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# Description (staff side)

Database Name	AccessScience (UMKC users only)
Resource URL	<a href="http://ezproxy.mnl.umkc.edu/login?url=http://www.accessscience.com/">http://ezproxy.mnl.umkc.edu/login?url=http://www.accessscience.com/</a>
Alt Database Name	McGraw-Hill's Encyclopedia of Science and Technology Online (UMKC users only)
DESCRIPT	<hr/> <b>Coverage:</b> Full text <b>Description:</b> This comprehensive science encyclopedia contains 8500+ articles and research updates, 110,000+ dictionary definitions, and 2000+ biographies of scientists. In addition it contains images, science news, videos, and Flash animations. It has special sections on Nobel Prize and Field Medal winners and an interactive periodic table and geologic time scale. It includes the following titles and is updated regularly: <ul style="list-style-type: none"><li>McGraw-Hill Encyclopedia of Science &amp; Technology, 10th Edition</li><li>McGraw-Hill Yearbook of Science &amp; Technology, current</li><li>McGraw-Hill Dictionary of Scientific and Technical Terms</li><li>Hutchinson Dictionary of Scientific Biography</li></ul> <b>Features:</b> Alerts, study guides <b>Maximum users:</b> Unlimited <b>Description updated:</b> June 12, 2009 - RP
Vendor	McGraw-Hill
Provider	UMKC University Libraries
Short Description	Encyclopedia of science and technology.
Database Subject	Biological Sciences
Database Subject	Chemistry
Database Subject	Computer Science & Electrical Engineering
Database Subject	Engineering
Database Subject	Environmental Studies
Database Subject	Geosciences and Geography
Database Subject	Mathematics and Statistics
Database Subject	Physics and Astronomy
Database Subject	Science and Technology

# User access

- Users can find our databases through our “Articles & Databases” page in the webpac.
- Search box for finding a database by name.
- A-Z browse list for database by title.
- List for database by subject.
- Access alternatives:
  - Name, subject searching through library catalog.
  - Databases tab on library homepage.

Library  
CatalogCourse  
ReservesMy Library  
AccountOther  
LibrariesArticles &  
DatabasesOnline  
Journals?  
Help

## Articles & Databases

Alphabetical list of **DATABASE TITLES:**

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | <#> | [All titles](#)

Type the name of the database you want, then click **Submit Search**.

Browse databases by **SUBJECT** or **TYPE:**

Pre-18th Century Primary Sources (400-1700)  
18th-Century Primary Sources (1700s)  
19th-Century Primary Sources (1800s)  
20th-Century Primary Sources (1900s)  
Anthropology  
Architecture Urban Planning and Design  
Art and Art History  
Biography

[New Databases](#)

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search

## UNIVERSITY LIBRARIES

Library Site Search

Miller Nichols Library  
Today's Hours: 7:30 A.M. - 1:00 A.M.

[Find Books, Articles...](#)  
[Requests & Services](#)  
[How Do I...?](#)  
[About Us](#)  
[Giving to the Library](#)  
[Contact Us](#)



**Miller Nichols Library**  
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(816) 235-1526

**Music/Media Library**  
[Hours](#) | (816) 235-1675

**LaBudde Special Collections**  
[Hours](#) | (816) 235-1532

**Marr Sound Archives**  
[Hours](#) | (816) 235-2798

**Health Sciences Library**  
[Hours](#) | [Directions](#)  
(816) 235-1880

**Dental Library**  
[Hours](#) | [Directions](#)  
(816) 235-2030

**Leon E. Bloch Law**

[RooSearch](#) | [Library Catalog](#) | [Databases](#) | [LibGuides](#) | [More](#)

### Find a Database

Type the name of the database you want, then click **Search**.

[Databases by title or subject](#) | [New Databases](#) | [Trial Databases](#)

### News and Events

[Asian Pacific American Celebration - May 5](#)

["Meet the Robot" FOL Event - May 12](#)

[New Books | New Databases](#)

 [Construction Updates](#)

### Poll

I have used my \$5.00 student print quota to:

- ☐ Print/photocopy at MNL 1st floor.
- ☐ Print/photocopy in Music/Media.
- ☐ Print/photocopy at HSL.
- ☐ Print/photocopy at Dental.
- ☐ Print in the MNL 3rd floor lab.

[View the previous poll results](#)



**Students**

[How do I start my research?](#)

**Faculty & Staff**

[Subject liaison librarians](#)

**Community**

[Friends of the Library](#)

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# Incident logs

- Field in the resource record used to track problems with a resource (like the IT helpdesk ticket concept).
- Add an incident log to the resource record to describe the problem, who reported it, and follow up action.
- Use Create Lists to review “open tickets” for follow up action.

# Sample incident log

- Incident: Resource switching from OCLC FirstSearch to EBSCOhost on July 1, 2010.
- Date/Time: 05/2010
- Reported by: Melissa Muth
- Reported to: OPEN TICKET
- Followup Action: EBSCOhost URL proxied and ready to use. Need revised database description information.  
5/28/10 BP

# ERM ticklers

- By date field:
  - Trial end date – Email alert sent 7 days before trial ends.
  - Termination date – Email alert sent 2 days before access ends.
  - Renewal date – Email alert sent 90 days before resource renews.
- Manual tickler: Can add a tickler with a specific date for a more specific maintenance task.

# Reports (Create Lists)

- Use resource records and Create Lists for various regular reports:
  - “On order” databases
  - “In process” databases
  - “On trial” databases
  - OPEN TICKET incident logs
- Can also provide quarterly, annual reports for new databases, database trials, and cancelled databases.
- Easier to collect “production” statistics related to the management of electronic resources.

# Webpac statistics

- Since ERM is part of the webpac, can get statistics via web management reports.
- Patron searches, indexes used for May 22-June 1, 2010:
  - 792 for database name index
  - 438 for database subject index
- Can view % of searches retrieving records vs. % of searches retrieving no records:
  - 51/49% for database name
  - 96/4% for database subject
- Can view actual search terms used (with a limit to just those with no results). People don't know how to spell CINAHL.
- But statistics available only for last 10 days.

# Usage statistics

- ERM supports COUNTER/SUSHI JR<sub>1</sub> reports (journal full-text usage). UMKC has not had a chance to implement this functionality yet.
- Usage login/URL metadata still kept in a Microsoft Word document. ERM record field for usage stats has “SEE MANUAL” to let us know it is covered in the manual.
- Usage data maintained in Microsoft Excel spreadsheets with separate spreadsheets for database, ejournal, and ebook usage.

# Has the ERM been worth it?

- Provides a place to store pricing information.
- Helps manage trials.
- Provides a better way to store license terms and display them to staff and users.
- Helps manage “on order” and “in process” resources.
- Centralizes description information and management information in a tool that also provides access to resources.
- Helps manage problems through incident logs.
- Ticklers make it easier to keep things from falling through the cracks.
- Lots of ways to create reports and collect statistics through Create Lists.
- Webpac statistics can help us better understand how our users look for our resources.

# Handling the DBs before ERM?

- Fully cataloged in MERLIN
- Link to Database page





MOBIUS > All MERLIN

MERLIN Web Gateway



RECORD # b6342294 All MERLIN Search

Search MOBIUS

**Title** North American theatre online [electronic resource].  
**Published** [Alexandria, Va.] : Alexander Street Press.

Persistent record link: <http://laurel.liso.missouri.edu/record=b6342294~58>

**Description** Updated quarterly.  
**Publication History** Began in 2005?  
**Summary** North American Theatre Online (NATO) provides detailed reference information on all aspects of the Canadian and American theatre. The database will grow to include entries for every author, play, theatre, major production, and production company from the 1600s to the present.  
**Notes** Mode of access: World Wide Web.  
**Notes** Title from home page (viewed Mar. 29, 2005).  
 Access restricted to subscribers.  
**Subjects** [Theater -- United States -- Databases.](#)  
[Theater -- Canada -- Databases.](#)  
[Theater -- United States -- Biography -- Databases.](#)  
[Theater -- Canada -- Biography -- Databases.](#)  
[Drama -- Collections.](#)  
**Genre/Form** [Electronic reference sources.](#)  
[Electronic full-text databases.](#)  
**Other Authors** [Alexander Street Press.](#)  
**Other Titles** North American theater online.  
 Also known as: NATO.  
**OCLC/WorldCat Number** 58675233



MERLIN · Missouri Education and Research Libraries Information Network  
 a MOBIUS Library Catalog

University of Missouri:

[MU Libraries](#) | [MU-Law Libraries](#) | [UMKC Libraries](#) | [UMKC-Law Library](#) | [Missouri S&T Library](#) | [UMSL Libraries](#)  
[State Historical Society & Western Historical Manuscript Collection](#)

# “Turn Off” BIB Records for Databases

- Removed link to DB page
- Suppressed bib and/or item
- No holdings in OCLC WorldCat (disadvantage)



# New Indexes

- Database Subject (UMKC)
  - Include also in LCSH and MeSH
- Database Name (UMKC)
  - Also in KW index
- Set these up at the same time as we were setting up other new indexes in MERLIN.

# III authorizations added

- 211-235 (view, create, edit, delete, etc. Resource, License, Contact records)
- 274-276 (more persons given authority for templates)
- 686 (edit lists of values for Resource and License fields)
- 690 (ERM Tickler table)

# Questions?



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