ELECTRONIC RESOURCE MANAGEMENT (ERM)

WHY?
HKU, Library Resource Fund %, 2002 - 2012

- E-Resources: 74.54%
- Monographs: 16.88%
- Print Journals: 4.30%
HKU, Number of Materials. 2002-2012.

- E-Journals: 41,613
- Books: 2,925,630
- E-Books: 3,481,589
- Print Journals: 1,831
ERM – What is it? (What should it be?)

- Workflow management
- License management
- Statistics management
- Administrative information
- Acquisitions Functionality
- Integration with other systems
- Subscription management
- Public display
- Vendor contact information
- Etc.

INTEROPERABILITY / INTEGRATION

• MARC record service
  – Titles come and go

• Knowledgebase
  – Link resolver
  – Holdings update

Public view
  – OPAC
  – A ~ Z list

• Access control
  – Authentication
  – Proxying
### SOLUTIONS: PROPRIETARY

<table>
<thead>
<tr>
<th>Product</th>
<th>Vendor</th>
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</thead>
<tbody>
<tr>
<td>Verde</td>
<td>Ex Libris</td>
</tr>
<tr>
<td>Millennium ERM</td>
<td>Innovative Interfaces</td>
</tr>
<tr>
<td>Web-scale Management Services</td>
<td>OCLC</td>
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<tr>
<td>EBSCONET ERM Essentials</td>
<td>Ebsco</td>
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<td>ERM as a Service</td>
<td>Swets</td>
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<tr>
<td>E-Resources Services</td>
<td>Harrassowitz</td>
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<tr>
<td>Journal Finder</td>
<td>WT Cox</td>
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<td>360 Resource Manager</td>
<td>Serials Solutions</td>
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<tr>
<td>TERMS Core ERMS</td>
<td>TDNet</td>
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<tr>
<td>Gold Rush</td>
<td>Colorado Alliance</td>
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## SOLUTIONS: OPEN SOURCE

<table>
<thead>
<tr>
<th>Product</th>
<th>Source</th>
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<tbody>
<tr>
<td>E-Matrix</td>
<td>North Carolina State University</td>
</tr>
<tr>
<td>CUFTS</td>
<td>Simon Fraser University</td>
</tr>
<tr>
<td>CORAL</td>
<td>University of Notre Dame</td>
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<tr>
<td>ERMes</td>
<td>University of Wisconsin-La Cross</td>
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THE GOOD, THE BAD, & THE UGLY

“For instance, even as many librarians praised ERM systems for finally consolidating ERM-related data, others emphasized that the data traditionally housed in the ILS environment—such as cost, fund, and vendor data—remains segregated from the ERMS without easy means for data transfer.”

-- Collins & Grogg, 2011
“Several librarians described the data within their ERM systems as static and only as good as their ability to maintain it. The increase in workload has resulted in increased staffing needs for many libraries.”

-- Collins & Grogg, 2011
“Librarians complained that they often end up piecing together manual workflows to accommodate ERM tasks.”

-- Collins & Grogg, 2011
The Problem

- Several overlapping menus & lists
- Different & overlapping platforms: CD ROMs & Web
- Different groups updating different menus & lists
- Different schedule for updating
- Broken links
- No one knew who to contact to fix each different menu & list
- ➔ ➔ A nightmare!
HKU Libraries Information Services

Main Menu

A) Networked CD-ROMs
B) Standalone CD-ROMs - Main Library
C) Standalone CD-ROMs - Law Library
D) Standalone CD-ROMs - Education Library
E) Standalone CD-ROMs - Music Library
F) DRAGONET (HKU Libraries Catalogue)
G) Exambase
H) World Wide Web
I) Quit

Enter

(c) Copyright 1989-95 McAfee, Inc.
F1=Help  F2=Network Printing  F3=Scan Virus
GOALS

• Content Management
  – One repository for the life of the content;
  – If data is entered in “place A”, let that be the only place it need be entered
  – Let existing workflows for print integrate with those for e-resources
INTEGRATED LIBRARY SYSTEM (ILS)

- Data was already entered in Acq, Cat, and Serials modules
- Database of record
- All other views could be derived from ILS
- => Multipurposing of data!

- Build from this:
  - A ~ Z list
  - Ezproxy file
  - Knowledgebase for link resolver
  - Statistics for Collection Development