

# ON THE DUBLIN CORE FRONT

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## Electronic Resources Management: An Update

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*"Always do sober what you said you'd do drunk. That will teach you  
to keep your mouth shut." - Ernest Hemingway*

### ABSTRACT

This article reviews the Digital Library Federation's (DLF) Electronic Resource Management Initiative (ERMI) guidelines, finalized in August 2004. The specifications are reviewed in light of the electronic resource (e-resource) management needs of academic libraries. The piece reflects on comments made by Tim Jewell and Adam Chandler in an earlier "On the Dublin Core Front" column. A review of commercial e-resource management system development is also included.

### KEYWORDS

DLF ERMI; Digital Library Federation Electronic Resource Management Initiative; electronic resource management; e-resource management; Tim Jewell; Adam Chandler

**2**004 was a year of achievements. Politics aside (after all, this is a bi-partisan column), evidence of water was discovered on Mars, Google went public, Brittany Spears got married – twice, and the 86-year Curse of the Bambino ended as the Boston Red Sox won the World Series. While the Red Sox were turning around an otherwise unspectacular season during the dog days of August (they went 21-7 that month), the ERMI Steering Committee, under the auspices of the Digital Library Federation, was publishing their final report. Although less titillating than the BoSox's historic comeback against the Yankees in the American League Championship Series, the ERMI report ranks to this librarian as one of the most important accomplishments of the past year.

Readers of this column may recall an interview piece with Tim Jewell and Adam Chandler that appeared in the 19:3 (2003) issue of *OCLC Systems and Services*. Jewell and Chandler discussed the problems associated with e-resource management, and the ways they envisioned the work of the ERMI Steering Group helping libraries. In August 2004, ERMI's final report was released, available on the DLF web site at <http://www.diglib.org/pubs/dlfermi0408/>. The report and its six appendices represent many years of intense efforts by Jewell, Chandler, and their Steering Group colleagues, Ivy Anderson, Sharon Farb, Angela Riggio, Nathan Robertson, and Kimberly Parker. Not surprisingly, this work has attracted the attention of leading library system vendors, publishers, and standards organizations. By reviewing the work of a small number of libraries that had developed early e-resource management systems, querying librarians about the types of e-resources data they needed to store and disseminate, and by sharing

these findings in public venues such as the American Library Association Annual Conference and Midwinter Meeting, DLF Forums, and the Charleston Conference, the ERMI Steering Group developed functional requirements for an e-resource management system that have become a development roadmap for commercial vendors. It is amazing to consider how much this group of talented, dedicated librarians has accomplished in a relatively short period of time.

## **MARKETPLACE UPDATE**

In the interview piece alluded to above, Jewell noted that the primary outcome he hoped to see as a result of ERMI was “rapid progress in developing systems to manage electronic resources” (Medeiros, 2003). Not quite two years later, Jewell’s wish is a reality. The leading library system providers all have e-resource management products either currently available or in the works.

First out of the gate was Innovative Interfaces. Their product, ERM, has been in commercial release for over a year. They have sold over 100 modules, many of these to libraries whose library management system is not an Innovative product. Innovative capitalized on early recognition of the e-resource needs of libraries, choosing a handful of libraries, including the University of Washington and Ohio State University, to help develop their product, which can integrate with an existing Innovative system or be used as a standalone module. Additional information about ERM is available at <<http://www.iii.com/mill/digital.shtml#erm>>.

Ex Libris is working with MIT and Harvard to develop their e-resource management system, Verde. At the 2005 American Library Association Midwinter Meeting held in Boston, Ellen Duranceau from MIT and Ivy Anderson from Harvard gave a brief presentation on Ex Libris’ work-in-progress. Verde is designed to accommodate the DLF ERMI functional specifications, and will interact with the SFX Knowledge Base. Verde is being built as a standalone system, useful for libraries regardless of their library management system, and is expected for commercial release sometime in 2005. Additional information about Verde is available at <<http://www.exlibrisgroup.com/verde.htm>>.

VTLS is working with the Tri-College Consortium (Bryn Mawr, Haverford, and Swarthmore Colleges) to develop their product, Verify. Verify is framed around the DLF ERMI functional specifications, and seeks to provide an application extensible for use by both individual and groups of libraries. Like ERM and Verde, Verify is being designed as a standalone system, and is planned for commercial release by the end of 2005. Additional information about Verify is available at <<http://www.vtls.com/Products/verify.shtml>>.

Endeavor Information Systems is at work on its e-resource management product, Meridian. Meridian is being developed with input from the international community. The system, which can operate in tandem with Endeavor’s Voyageur library management system or as a standalone application, should be in general release by June 2005. Additional information about Meridian is available at <<http://www.endinfosys.com/prods/meridian.htm>>.

Dynix is planning to build an e-resource system that will complement existing Horizon systems. Additional information is available at <<http://www.dynix.com/products/erm/>>.

In addition to these commercial products, a number of feature-rich library-developed systems exist. These systems include Penn State’s ERLIC <[http://www.libraries.psu.edu/iasweb/fiscal\\_data/ERLIC\\_SHARE/Publish/index.html](http://www.libraries.psu.edu/iasweb/fiscal_data/ERLIC_SHARE/Publish/index.html)>, Johns Hopkins University’s HERMIS <<http://hermes.mse.jhu.edu:8008/hermesdocs/>>, and Boston College’s ERMdb <[http://www.bc.edu/bc\\_org/avp/ulib/staff/erm/erm-db/](http://www.bc.edu/bc_org/avp/ulib/staff/erm/erm-db/)>.

Some libraries, including MIT, Harvard, Ohio State, and the Tri-College Consortium, will need to address the challenge of data migration from their homegrown e-resource management systems to new commercial systems. It will be interesting to see how well these commercial systems are able to map local data elements into the DLF construct.

For additional information about commercial e-resource management system development, I suggest Ellen Duranceau's "Electronic Resource Management Systems from ILS Vendors," which appears in the September 2004 issue of *Against the Grain* (Duranceau, 2004). The timeliest information on this topic is available at the "Web Hub for Developing Administrative Metadata for Electronic Resource Management" <<http://www.library.cornell.edu/cts/elicencestudy/home.html>> maintained by Adam Chandler at Cornell University.

## **WORKFLOW CONCERNS**

Electronic resource management systems are just one step in helping libraries manage e-resources. Effective e-resource management requires changes to the ways libraries do their work. A colleague mentioned to me a few days ago that his library would soon be hiring an "e-resources person" to assist with the burgeoning array of tasks affiliated with the access, administration, and control of e-resources. Our conversation reminded me of a study conducted by Cindy Hepfer and the much-referenced Ellen Duranceau that appeared in a 2002 issue of *Serials Review* (Duranceau, 2002). The article details data gathered by the authors during the period 1997 to 2002. Although just a small sample (15 libraries responded), a trend was clear: staffing for e-resource activities is being vastly outpaced by the growth of e-resource collections in libraries.

A more recent and expansive survey of libraries on the topic of staffing is found in *Managing Electronic Resources* (Grahame, 2004). This February 2004 study details results of 69 ARL libraries that responded to questions about their ability to manage electronic resources. Not surprisingly, the vast majority of respondents indicated they had made staffing or organizational changes as a result of e-resource demands.

## **CONCLUSION**

It's the combination of e-resource systems, sufficient and proper allocation of staff, adoption and standardization of the ERMI functional specifications, and an unreferenced but critical issue, agreeable model licensing, that will help libraries overcome the challenge presented by today's digital information environment.

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