ERMS in the Library

## What should it do for us?

Helen Clarke

Head, Collections Services

University of Calgary

Thinking about ERMS

- Two year process and we're still shopping
  - Started with DLF requirements
  - Internal workflow analysis
  - Demo's from variety of vendors

- Experience led to a functional list of requirements—translated the DLF requirements into a shorter series of statements as to what an ERMS should do for us

- Sent out an RFI based on functional list, 4 vendors replied
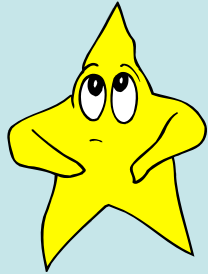
Order and Payment Tracking

*Manage and link the information elements needed to track the current status of a product and payments*

- tie orders to all affected titles and orders ↑→→→
- show where order is in acquisition and renewal process ↑↑→→
- link order to other attributes (*vendor, consortia*) in the ERMS ↑ ↑↑→
- link financial information (*split payments*) to orders ↑→↓↓
- recurring costs and one time payments →→→↓
- standard and customizable alerts for key dates ↑→→→
- indicate status of order regarding other products (*SFX enabled*) ↑↓↓↓
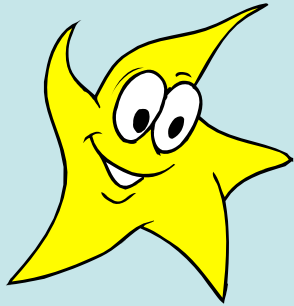
Manage License and Rights Information

*Hold and manage license terms and other rights issues*

- consistent description of licensing terms ⬆⬆⬆⬆
- link licenses to the individual title ⬆⬆⬆⬆
- alerts to changes in license conditions ⬆⬆⬆⬆
- breaches ⬆⬆⬆⬆
- historic information ⬆⬆➡➡
- Locally defined data elements that are searchable and reportable ⬆➡⬇⬇
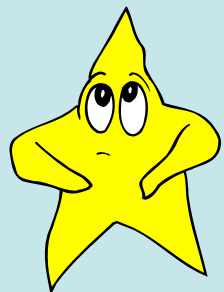
Support Library Workflow

Flexible open interface, designed to help Library units identify which activities have been completed and which still need to be done

- easily navigable interface
- single point of maintenance for all order, licensing, and technical support
- Indicate unfulfilled steps in order or renewal
- levels of access/authorization for different steps
- customizable routing alerts
- a reverse workflow in the case of termination
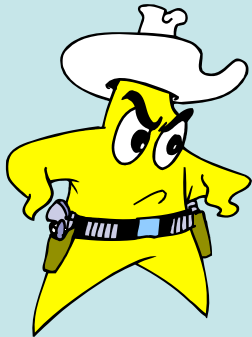
Manage and Communicate Relationships among Products and Entities

*Ability to report, track and produce reports regarding the relationships among items*

- – alerts when changes to one item will have impact on others (*bundled orders, scaled discounts*) ➔⬇⬇⬇

- – relationships between individual titles and packages (*one title many packages)* ⬆➔➔➔

- – relationships with external services (*SFX enabled*) ➔➔⬇⬇

- – search by specified types of relationships (*consortia*) ⬆⬆➔⬇

- – Search for entities by specific fields ⬆⬆➔⬇
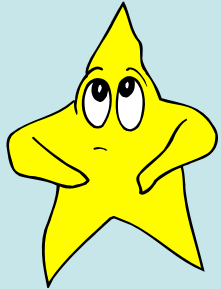
Support Administration of Resources

*Manage information critical to initial set up and ongoing maintenance*

- – a secure environment for administrative data (*logins*) ⬆⬆⬆⬆
- – knowledge base and updates of resource metadata ⬆⬆➡⬇
- – alert to changes in access (*urls change*) ⬆➡⬇⬇
- – alert and track access problems ⬆➡➡⬇
- – local additions and changes to resource metadata ⬆⬆⬆⬆
- – track customizations ⬆⬆⬆➡
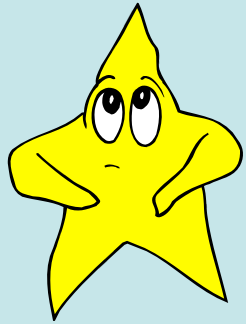
Manage Historic Records

Retain information tied to individual products over time

– identify and secure historic information (*cost, rights*) ⬆⬆⬆➡

– track content changes at the individual title level, including changes in holdings over time ⬆⬆➡⬇
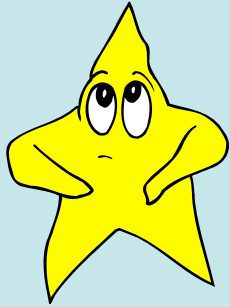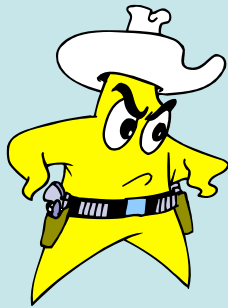
Reporting

- suited to the standard information needs of Library staff ⬆⬆⬆⬆
- individual orders and for groups of orders that meet criteria (*renewal date*) ⬆⬆⬆⬇
- financial, licensing, and order information at the individual title level ⬆⬆⬆⬇
- license terms ⬆⬆⬆⬇
- unfilled steps in workflow ⬆⬇⬇⬇
- historic information ⬆⬆⬆⬇
- Provide support, for the following: ⬆⬆⬆⬇

  - URI, ONIX data import and export, Library defined data elements, IP addresses, Printing, emailing, and downloading capacity for reports and data extractions
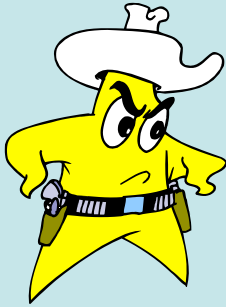
Statistics

Ability to import, manage, and display statistics related to resources

- internal statistical data from ERMS for library reporting purposes ⬆⬆⬆⬆

- external statistical data from e-resource vendors ⬇ ⬇⬇⬇

Consortia

- – consortia agreements and arrangements (*multiple vendors*) ↑ ↑↓↓
- – reports on demand (*consortia products*) ↑↑↓↓
- – same product operates more than one agreement ↑↑↑↓
- – same title or product is held in different packages by consortium members ↑↑↑↓
- – hold, track, and report financial information ↑↑↓↓
- – designate a subset of products to be tracked independently (*vendor*) ↑↓↓↓
- – exchange or share data between consortia partners using different instances of the system ↑↑↑↓