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AUTOMATED LIBRARY SYSTEM VENDORS AND ELECTRONIC RESOURCES MANAGEMENT

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Public and academic libraries are subscribing to an ever increasing number of electronic resources. Information gathered from more than 200 libraries in 2003 by Information Systems Consultants Incorporated (ISCI) revealed that the average mid-size library subscribes to 45 databases and the average large library to more than 85. One library reported 386 subscriptions. Managing the licenses for that many databases manually is a major headache—enough of a headache that a number of libraries have created databases to manage their licenses. While that has improved control over the licenses, it has increased the amount of duplication in data entry as yet one more system is implemented.

A few libraries have turned to the vendor of their automated library system for a "turnkey" solution. Among the first of these was the University of Washington Library. It asked Innovative Interfaces for an ERM (Electronic Resources Management) product. The automated library system vendor is a logical supplier of an ERM product because many of features of such a product are inherent in the technical services modules of an automated library system and much of the information about the databases is in the library portal that is now part of many systems. There are almost no mid-size and large public and academic libraries that do not have a system supplied by Dynix, Endeavor, Ex Libris, Gaylord, Geac, Innovative, Sirsi, TLC, or VTLS.

Requirements for an ERM

There appears to be consensus that the following information is required for good management of electronic resources:

Database name

The database name should be that on the license, but variants of the name, including the name of the print version, if any, should be included.

Content

A description of the content should include the database breadth and length of coverage. The extent of the backfile that is available, but not included in the license, should be identified.

Producer, licensor, and aggregator

The producer of the database should be identified, as should the licensor and aggregator. For example, ABI Inform is licensed by ProQuest, but it is accessed through OCLC. Thus, the aggregator is the provider, rather than the producer or the licensor.

Packaging

Databases that come from a single source may be combined in packages. Journal titles from multiple sources are also frequently packaged. A library needs to be able to access records by either the database name or the package of which it is a part. As packages, especially packages of journal titles, can have a great number of resources, it is important that it be possible to import information from external sources that itemize package content.

License duration and renewal alert

The beginning and ending dates of the license need to be included, and there should be a renewal alert a fixed number of days prior to expiration. Ninety days is the minimum.

Copy of contract

An electronic copy of the contract with the vendor should be part of the record. A machine-searchable version that can be searched by keyword is better than a PDF.

Price and payment terms

The subscription price or per-view price should be included, along with the payment schedule. The basis for the pricing should be included: a site license for the entire library, site licenses for each location, population-based pricing, budget-based pricing, tie-in with a print subscription, etc.

Payment history

Payment dates, amounts, invoice numbers, and voucher or check numbers should be part of the record. Libraries also need to be able to record internal fund code data so that databases can be properly charged to the appropriate units from year to year.

Access method(s and resource link)

The access method(s) should be spelled out, and the URL should be included.

Separate URLs or a URL and a referring URL and access method descriptions may be needed for resources accessed both locally and remotely.

Access restrictions

Is anyone in the library able to access the database from a workstation with a registered IP address or through a server? Are remote users who have library ID numbers able to access the database? It may be necessary to have a field where IP addresses for servers or individual authorized in-library units can be listed.

Since vendors and libraries sometimes share authentication responsibilities, it is important to indicate all of the authentication methods in use for the database. These might include local users by IP address, remote users authenticated by the vendor using patron barcode number, or remote users authenticated by the library using patron barcode number.

Vendor contacts

Names, addresses, phone numbers, and e-mail addresses of sales, customer service and technical support contacts should be listed, with fields to add names for each category as necessary.

Contact history

All contacts regarding a database or the license should be recorded, including date, issue, and resolution.

Use statistics

Use statistics should be available, possibly in a separate vendor statistics site. Among the statistics it is reasonable to expect are the number of sessions, searches, hits, page views, length of connection time, searches per resource, items viewed, items printed, items e-mailed, etc.

Use statistics and cost per use

A library should be able to determine the cost per use for subscription databases by dividing the annual subscription price by the number of views or, if preferred, the number of items printed or e-mailed. Database providers and aggregators do not provide this information, but they should provide a way of importing the use and cost data into the ERM record.

While cost per use calculated on the basis of number of views does not indicate whether the database was useful, it does help to identify expensive databases. For example, one library found that its databases cost as little as \$.19 and as much as \$6.30 per view. It was then able to review all of those that cost more than \$1.00 per view with the idea of either promoting the database to increase use or canceling it in favor of a more suitable database.

Who sees what

The person(s) responsible for managing the contracts for electronic resources must have access to all of the foregoing information, but parts of the information should be available to others. Public services staff and patrons should be able to see journal holdings statements, access URLs, printing permissions, interlibrary loan policies, and other information that will help them access electronic resources. Multiple layers of security should be provided through passwording

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Offerings of automated library system vendors

As of mid-February 2004, only Innovative Interfaces had completed an ERM product and installed it at a number of libraries. Provision is made for all of the data elements previously itemized except use statistics and cost per use.

The University of Washington Library was Innovative's first ERM customer. Others include Washington State University, Ohio State University, University of Arizona, CISTI of Canada, National Institutes of Health, Oregon Health Sciences, and University of Nevada at Reno, University of California/San Diego, and Glasgow University. Two libraries that do not have Innovative's automated library system have contracted to purchase standalone systems from Innovative: Utah State University and the Library of Congress. [The latter announced its decision at the American Library Association Midwinter Meeting on January 10, 2004].

VTLS had completed development of its ERM product in mid-February of 2004, but it had not yet demonstrated it publicly. Provision is made for all of the data elements previously itemized except use statistics and cost per use. When the product is introduced, it will be known as VERIFY (VtIs Electronic Resource Information and Funding utility).

Dynix, Endeavor, Ex Libris, and Sirsi were all developing ERM products in early 2004, but none expected general release before the fourth quarter of 2004.

GIS Information Systems responded to an inquiry in December 2003 that it was not actively developing an ERM product because it felt that demand would be primarily by academic libraries, a market sector on which it does not focus. TLC did not respond.

Even at this early stage in the development of ERM products, it is clear that it will be difficult to match up the products offered by automated library system vendors. While Innovative and VTLS have created products that can be used standalone or integrated with their automated library systems, some vendors intend to build on their portal products to achieve greater integration. That will make it difficult for a library that already has a portal from a different source to consider them.

ERM Product Pricing

Most of the vendors that have developed, or are developing, ERM products have not yet firmed up pricing. What information is available suggests that the minimum price will be \$20,000 to \$30,000. The size of the library or the number of licenses to be controlled will probably determine how much higher the prices may go.

Alternatives to vendors of automated library system

The Colorado Alliance also offers features that help with e-journal management tasks for the more than 40,000 unique titles in 525 databases and e-journal packages available through it.

Some of the libraries that have developed their own electronic resource management tools may be willing to share the fruits of their efforts.

Requirements development

Libraries that are developing requirements for an ERM product should consult:

"Report of the DLF Electronic Resource Management Initiative. Appendix A: Functional Requirements for Electronic Resource Management" The requirements, which were adapted from requirements developed at Harvard and MIT are broader than what has been described in this paper, are the most useful source available at this time. The URL is

www.library.cornell.edu/elicensestudy/difdeliverables/fallforum2003/FunctionalSpec20031114/doc/

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