

Implementing ERM: Electronic Resource Management or Extremely Riddlesome Matter?

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TIMELINE

- **February 2017** – Appointed Digital Resources and Discovery Specialist
- **April – July 2017** – Reading and research – literature review of existing ERM research and implementation projects
- **July-August 2017** – Reaching Out – contact other institutions with Sierra to assess their own ERM implementation projects and progress
- **August 2017** – Project progress report
- **September – October 2017** - Collect e-resource data – what do we have exactly ? Create spreadsheet
- **November 2017** – Add e-resource records to Sierra ERM module
- **March 2018** – Meet to discuss licencing function and the decisions that need to be made for customising data fields
- **March/April 2018** – Add existing Sierra Order Records to E-Resource Records

Research & Literature Review

Kate Silton and Tiffany LeMaistre (2011):

Disadvantages to implementation:

- labor intensive/time consuming process of populating different types of records in this system with data
- current literature ‘overwhelmingly indicates’ Ill’s ERM presents workflow challenges so great as to impede implementation (three years or more and still not complete)
- inputting information into ERM is ‘feat’ – problem of knowledgebases not presenting information in the same way thus hard to universalise standards (inconsistent metadata from e-journal content providers).
- 85% said there was ‘some’ improvement to workflows as a result of the ERM.
- Majority reported difficulty with implementation and that they were incomplete – 59% said implementation satisfaction was 3 or below (scale 1-5).

“Current research, vendor training, and documentation do not adequately convey the realities of implementing Ill's Electronic Resource Management System. The promise of ERMI is met by a lack of standards across vendors making an ERMS difficult to populate and maintain” (2011, pp. 83-84).

While the ERM implementation was not a disaster by any stretch, it did fall far short of our goals. Upon reflection of our experience, it became evident that a more formal preparation process would have resolved some of the issues we encountered (Enoch, 2014, p. 185).



Reaching Out!

Institutions contacted who also have Sierra Library Management System:

Essex = Not fully operational – have not implemented licence records or statistics

Bedfordshire = No response

City = Not fully operational

Harper Adams = Abandoned implementation. Awaiting Sierra Knowledgebase

Warwick = Abandoned implementation. Awaiting Sierra Knowledgebase

St. Mary's = No longer using Sierra

Aston = Not fully operational – only basic functionality

University of North Texas = Not full implementation but almost – cannot harvest SUSHI - biggest issue to date was coverage load – provided guidelines/instructions/templates

ACTIONS!

Began data preparation - put together a spreadsheet of e-resources we subscribe to – this involved cross-checking Sierra orders, A-Z list of databases and SFX (where our e-resources are activated and made available on NELSON – our electronic resource online library)

Once the majority of e-resources and databases had been established, e-resource records were created in the Sierra ERM fields include:

- Name and description
- Type and Format
- Activation and Renewal dates
- URL

Contact details of the publisher and supplier were created and also attached

Once the e-resource records were created, the order records for each subscription were linked to the e-resource records

WHAT NEXT?

- Determine customisable fields for licence function and begin to populate with relevant licences

As Condic (2008) observes, “The licensing information can be tedious to input, but the resulting benefit is the knowledge you gain about details from the licenses that you may otherwise miss. You may be tempted to bypass the step of inputting details from licenses by linking to an electronic version of the license, but this solution could result in missing key elements of the licenses.” (p. 142)

- When e-resource records are complete and the ERM fully populated, batch load holdings using Coverage Load feature for each database
- Attempt to harvest Sushi statistics
- Create ERM instructions and workflow for maintenance and updates

WHAT NEXT?

BREATHE A HUGE SIGH OF RELIEF!!



Any questions?



References

Enoch, T., (2014) Preparation is Key: Lessons Learned from an ERM System Implementation. *The Serials Librarian*, 66, (1-4), pp. 182-188

Condic, K., (2008) Uncharted Waters: ERM Implementation in a Medium-Sized Academic Library. *Internet Reference Services Quarterly*, 13(2-3), pp.133–145

Silton, K. & Lemaistre, T., (2011) Innovative Interfaces' Electronic Resources Management System: A Survey on the State of Implementation and Usage. *Serials Review*, 37(2), pp.80–86

Giphys (in order of use)

'What?' <https://giphy.com/gifs/pedro-no-ahora-porfavor-nios-en-crecimiento-tu54GM19sqJOw>

'The horror' <https://giphy.com/gifs/eyes-terror-cabin-boy-l2JdWN58ojM9kneso>

'Sigh of relief' <https://giphy.com/gifs/sigh-relief-close-call-4bIY9Mi4b8ESlhROnW>

'Any questions' <https://giphy.com/gifs/dog-what-confused-7K3p2z8Hh9QOI>