

# Innovative Interfaces' Electronic Resources Management System: A Survey on the State of Implementation and Usage

*Kate Silton and Tiffany LeMaistre*

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This paper presents the results of a survey on Innovative Interfaces' Electronic Resource Management System (III's ERM). The authors distributed the survey to III ERM users through LISTSERVS in November 2009 and received sixty-one responses. The survey contained seventeen questions that focused on three themes: satisfaction with implementation, impact on workflow, and impact on patrons. The results indicated that difficulty with implementation caused some dissatisfaction with staff workflow, although a majority of informants indicated that III's ERM improved staff workflow to some degree. The major benefits of III's ERM were listed in terms of the product's impact on patrons. *Serials Review* 2011; 37:80–86.

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## Introduction

Innovative Interfaces' Electronic Resource Management system (III's ERM) was released in March 2004. Nonetheless, many of the early adopters still refer to their implementations as works in progress. In preparation for implementation at the St. Edward's University library, the ERM team was advised by colleagues at other institutions to allot as many as three years for the process.

The lack of quantitative research on III's ERM is an impediment to preparing for implementation. The literature on III's ERM includes numerous case studies of individual libraries, but very few studies that identify overall trends. While these case studies indicate that III's ERM had a significant impact on individual libraries, it was difficult to determine whether the authors' experiences were shaped by local circumstances or by the product itself. This survey of III's ERM users was conducted to fill the quantitative void in the literature, to determine the state of implementation, and to present a collective view of the product.

## Background and History

Innovative Interfaces announced their plans for an Electronic Resource Management module in 2002, revealing that the product would be developed in partnership with the University of Washing-

ton. Early announcements indicated that the product would focus on licensing and acquisitions of electronic resources, suggesting that III's ERM would be built as a back-of-house product meant to ease staff workflow.<sup>1</sup> This initial focus was appropriate when one considers the increasing attention given to electronic resources' impact on staff time. Incremental increases in library staff were outweighed by the exponential growth of the resources they managed.<sup>2</sup>

A major challenge in managing the increasing volume of electronic resources is a lack of standards. The Digital Library Federation attempted to bridge this gap by creating the Electronic Resource Management Initiative (ERMI). Their goal was to define data elements, best practices, and functionality necessary for the management of electronic resources.<sup>3</sup> Tim Jewell at the University of Washington was the coordinator for the DLF ERMI project.<sup>4</sup> Although ERMI's final report was not released until August 2004, ERMI drafts were incorporated into the development of III's ERM module.<sup>5</sup>

## Literature Review

The literature related to III's ERM addresses the experiences of individual libraries and librarians rather than the collective experience of the profession. Claims regarding difficulties with implementation are frequently repeated with no empirical data to supplement individual experiences. While these accounts can certainly provide insight into librarians' experiences with III's ERM, their usefulness in identifying overall trends is limited.

## Development Partners

Early articles on III's ERM chronicled the experiences of the development partners. Diane Grover of the University of Washington and Ted Fons of Innovative wrote the first of these articles detailing the development process. They emphasized the influence of the DLF ERMI initiative<sup>6</sup> and the goal of creating a database of

**Silton** was Electronic Resources and Outreach Librarian, Scarborough-Philips Library, St. Edward's University, Austin Texas, until February 2010; she is currently Electronic Resources Librarian, F.D. Bluford Library, North Carolina A&T State University, Greensboro, NC 27411, USA; e-mail: [ktsilton@ncat.edu](mailto:ktsilton@ncat.edu).

**LeMaistre** is Library Assistant III for Serials, Scarborough-Philips Library, St. Edward's University, Austin, TX 78704, USA; e-mail: [tiffany@stedwards.edu](mailto:tiffany@stedwards.edu).

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record, "integrating licensing and purchasing details using a single interface, streamlining workflows, eliminating the need to maintain separate spreadsheets and databases ... [and] tracking vendor contacts."<sup>7</sup> In 2005, Laura Tull and three other colleagues at Ohio State University wrote an article about their partnership with III and their ERM implementation. This article provides a comprehensive description of record types and functions within ERM. While Tull et al. praised the system's back-end functions, such as the ability to use Millennium's Create Lists feature to manage ERM data,<sup>8</sup> they clearly considered display within the OPAC to be one of the most important features of ERM.<sup>9</sup>

In 2008, Nancy Beals of Wayne State University discussed the factors that led to her library's decision to purchase III's ERM product. Since Wayne State already used III's integrated library system, this module was an early favorite in their product analysis.<sup>10</sup> They cited the following features as particularly beneficial: integration with the existing ILS and the OPAC, license management in the OPAC,<sup>11</sup> and the promise of future SUSHI compliance.<sup>12</sup> Disadvantages to implementation included "the labor-intensive, time-consuming process of populating different types of records in this system with data."<sup>13</sup>

### Incomplete Implementation

The current literature overwhelmingly indicates that III's ERM presents workflow challenges so great as to impede completing an implementation. Several speakers at a 2008 NASIG forum commented that their implementations were incomplete, despite having III's ERM for three or more years.<sup>14</sup> Kristine Condic also recognized the difficulty of implementation, describing data input as a "feat" that, once accomplished, will make electronic resource information "easily viewed, updated, and examined."<sup>15</sup> She went on to say that "[t]he big question that cannot be overlooked is the amount of time that is needed to input this information into ERM products. This is not a trivial matter and must be addressed before serious consideration is given to subscribing to any of these products."<sup>16</sup>

Denise Pan of the University of Colorado Denver's Auraria Library describes their attempt to implement III's ERM in three days. This implementation was far from satisfactory, and Pan details reasons why it did not happen as expected. She cites miscommunication between the library and III as a major problem.<sup>17</sup> Pan suggests that the vendor should incorporate a solution for managing the pre-implementation process, which includes decisions about how to record data in ERM.<sup>18</sup>

### Lack of Standards

Another common theme in the literature is an increasing need for standards with regard to managing electronic resources. In 2008 *The Journal of Electronic Resources Librarianship* began a column "E-Opinions from the Field" with the question: "What is the future of Electronic Resource Management Systems?" Readers were asked to respond to the question, and five answers were published. Angela Riggio, Head of Digital Collection Management at the University of California, Los Angeles, and a member of the ERMI Steering Group,<sup>19</sup> expressed hope regarding efforts to standardize the multiple types of data that populate electronic resource management systems. However, she stressed that vendors must actually use these standards and that libraries must encourage vendors to do so.<sup>20</sup> In the same column, Warren Holder of the University of Toronto discussed the difficulties of working with multiple knowledge bases that do not present information in the same way.<sup>21</sup> These sentiments were echoed in Les Hawkins's 2009 column in *Serials Review* that reflects on a thread from SERIALST indicating

frustration among librarians presented with inconsistent metadata from e-journal content providers. This inconsistent metadata produces access barriers. Hawkins expressed hope that upcoming NISO standards will improve some of these metadata issues.<sup>22</sup>

### Research on ERM

While research on III's ERM is limited, there have been a handful of studies on ERMS in general. Maria Collins conducted studies on the state of electronic resource management systems in 2005 and 2008. The original study examined ERMS products and compared their characteristics.<sup>23</sup> In 2008, this research was updated to reflect current products on the market and supplemented with a survey of eight librarians at organizations using ERMS.<sup>24</sup> The librarians cited a variety of benefits to ERMS implementation including the convenience of housing administrative information in a central database of record, access to license terms, and the ability to display outages and resource advisory information to patrons.<sup>25</sup> However, the benefits were tempered by the evolving environment of electronic resource management.<sup>26</sup> Changing standards and a lack of interoperability between publisher metadata and vendor systems led to frustration and difficulties for the librarians involved. Several vendors also cited the difficulty of working in a new environment as a challenge in the development of ERMS. The standards are sparse, rapidly changing, and infrequently used. All of these issues demonstrate the necessity of a flexible product.<sup>27</sup>

### Survey Methods

The current literature related to the ERM offered by Innovative Interfaces, revealed a need for a quantitative survey on implementation and usage of the product. The purpose of this survey was to determine whether the experiences reported in the case studies outlined above applied to III ERM users across the board. In particular, this study sought to verify claims that implementations are difficult to complete and that workflow was negatively affected. Informants were asked to report on their previous methods of electronic resource management, their selection and implementation of III's product, and their overall satisfaction with the product.

The survey contained seventeen questions that focused on three themes: satisfaction with implementation, impact on workflow, and impact on patrons. Informants were asked to rate their satisfaction in these areas on a graded scale and were also given the opportunity to make comments. Google Docs was used to create the survey and to gather responses. The survey was posted to the Innovative User's Group listserv, III's ERM listserv, and SERIALST in November of 2009 and received sixty-one responses within one month. After the survey ended, the comments were coded to identify trends.

### Findings

#### Informants

The vast majority of informants were from academic libraries. Two were part of a library consortium, and four were working in law or corporate libraries. None of the survey informants were from public libraries (survey question 2). Most of the informants had a job title related to electronic resources, but several other areas were represented including technical services, serials, and systems (survey question 1). Library size varied from 650 patrons to 67,000 (survey question 3). About half of the informants reported spending 50% or more of their budget on electronic resources (survey question 4).

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