

# Ex Libris



## **Solutions Forum: Visions of ERM**

**Managing Electronic Collections Workshop  
Denver, Colorado  
September 2006**

Ted Koppel  
**Verde** Product Manager  
Ex Libris

# Why do we need a vision?

- Electronic resource use continues to increase
- E-product expenditures as percentage of materials spending continues rising
- Near universal acceptance of electronic resource search and delivery tools such as
  - Link resolvers
  - Metasearch engines
- **Electronic full-text delivery is now an expectation, not an extra, by students and researchers**

## The bottom line:

- ERM is more than user statistics or licenses
- **ERMs are (or will become) the library's corporate memory for all factors related to electronic resources at all levels**
- **In filling that role, ERMs become central to all process and all services within the library**

## Why ERM? (Management View)

- Manage lifecycle events for e-products
- DLF-specified data elements and relationships
- Financial management and audit-ability
- Tool to centrally store and maintain contracts, licenses, other raw documents
- Rationalize ER processing and related procedures
- Search, retrieve, report across management attributes
- Harvest, calculate, apply user and financial statistics
- Support consistent workflows to support data quality



## Why ERM? (Financial view)

- 2003-2004: **Average** ER Expenditures per ARL library was approx. \$2.7 million \*
- Factor in 5% price increases and inflation, the **average** library in 2007 will pay \$3.5 million
- Five year investment in ER: \$ 18-20 million
- Ten year investment in ER: \$ 40+ million

\* ARL Library Trends, Kyrillidou and Young, September 2005, available at:  
<http://www.arl.org/stats/arlstat/04pub/04intro.html>



# Evolutionary change

- P-serials management (up to 10 years ago)
- H-serials management (P & and a little C) (up to ~2 years ago)
- H-serials + ERM (currently) – but e-Resources are extending beyond serials
- Resource Manager that handles everything (E, P, and D)
  
- Print isn't dead – an ERM or RM system that doesn't handle print won't do the job

# The bigger picture

## ● Legacy systems

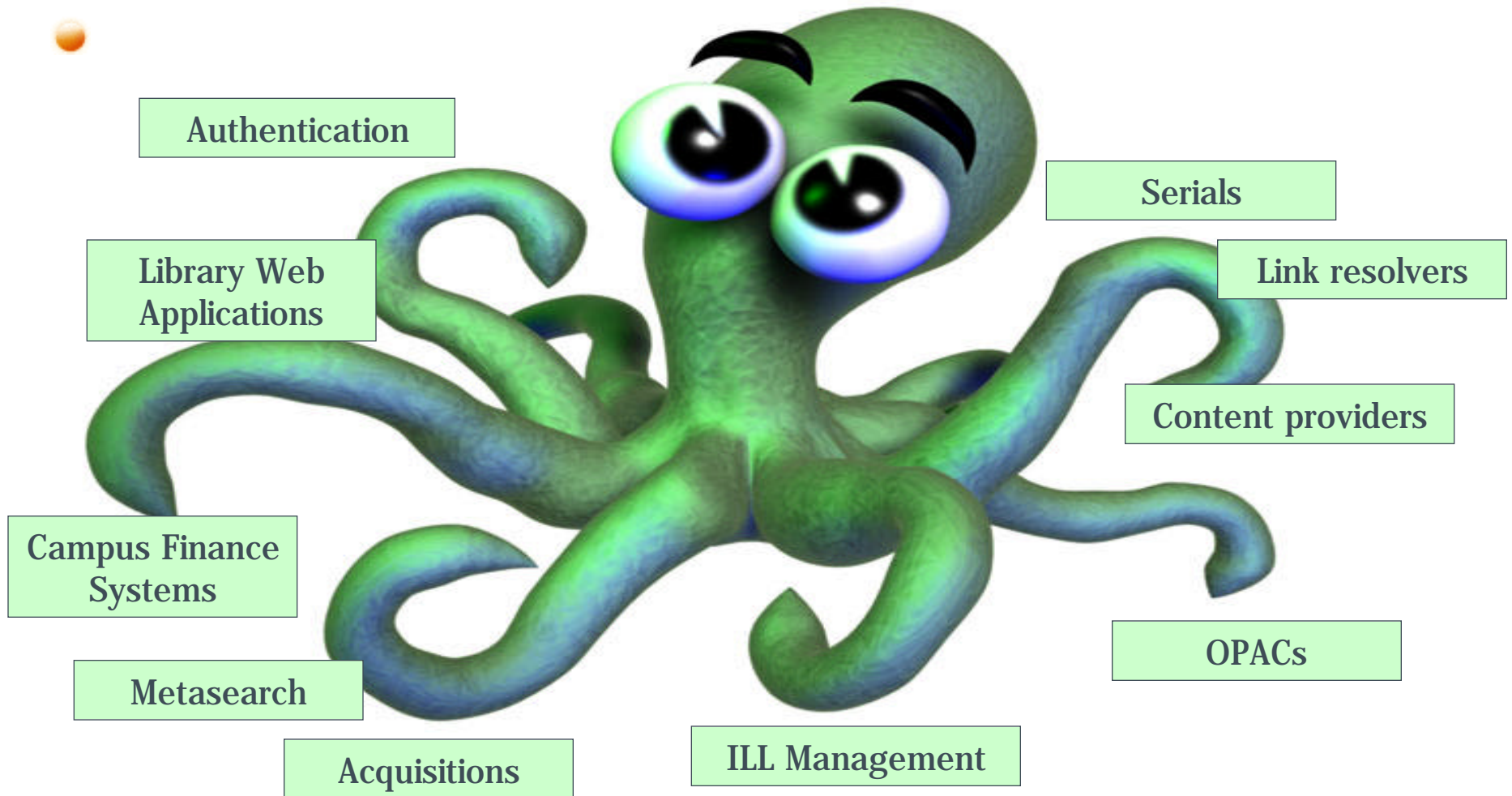
- Serials
- Acq
- Homegrown ERM
- Licensing
- ILL
- OPAC
- Spreadsheets & paper records



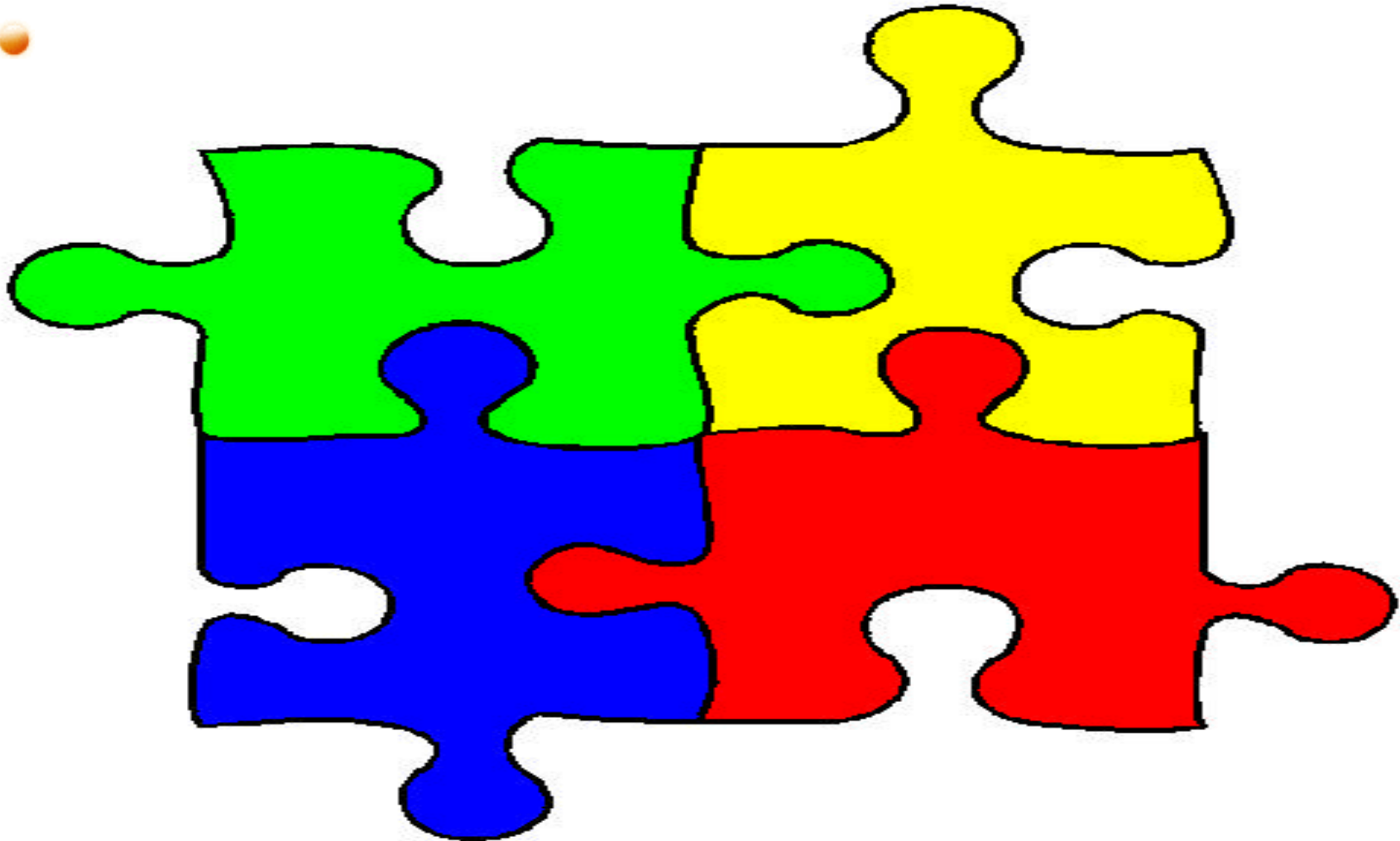
## ● ERM's role

- Process management
- Link Server interaction
- ILL / resource sharing
- Business transaction
- Financial system interoperability
- Permission authority
- Central and integrated

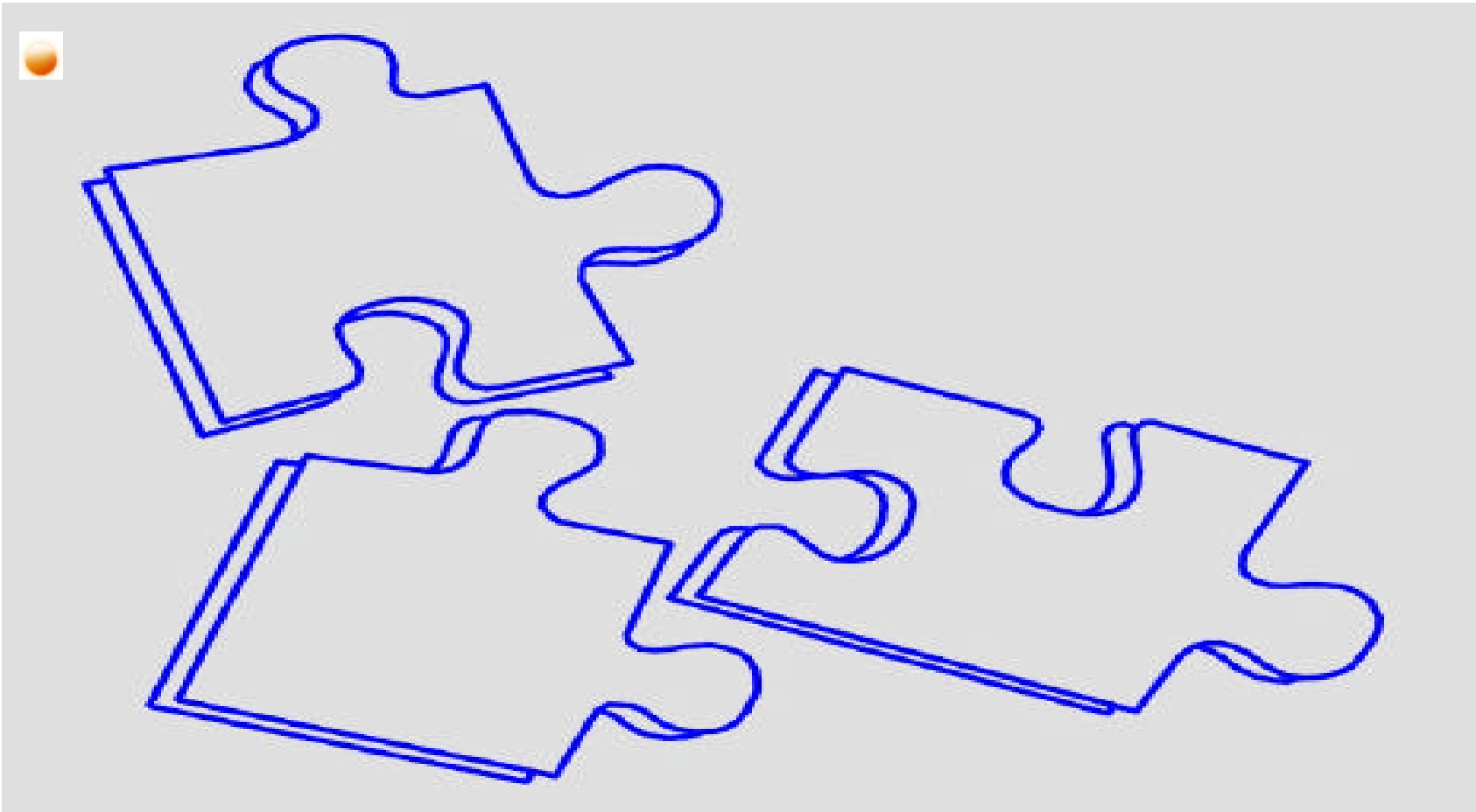
# ERMs today touch many different areas



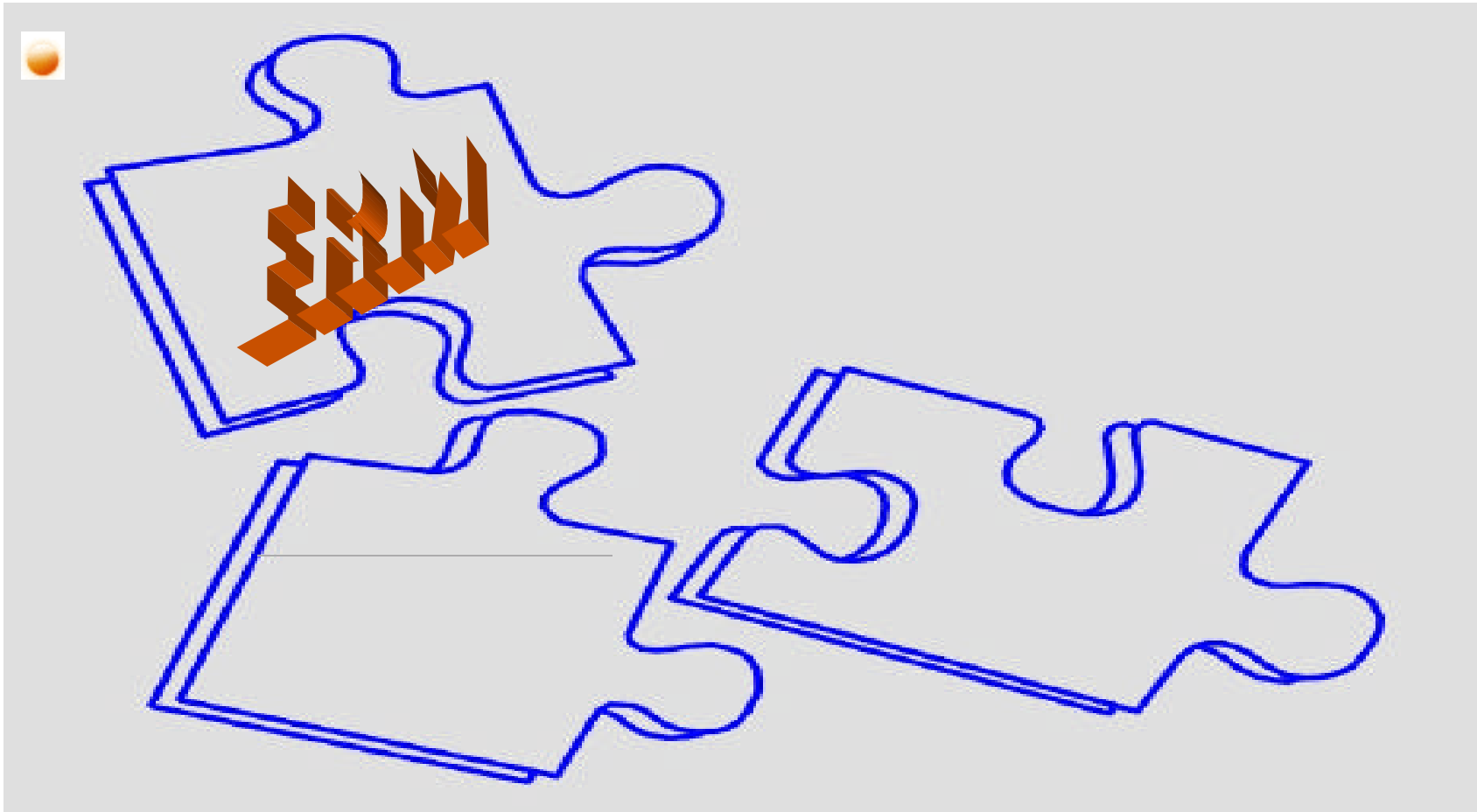
## And the current ILS model is ...



# Dis-integrating, or perhaps



# Re-forming around a new model



## What we can expect

- Discovery and delivery tools will become more distinct from ILS in presentation and function
- ERMs will feed just-in-time data to any public service applications (including discovery, link resolvers, metasearch, library web apps)
- ERMs will eventually subsume (and then, expand on) large portions of Acq and Serials functionality and responsibility

## What we can expect (2)

- As the notion of an ILS morphs, interoperability among the ERM and other vendors' systems becomes essential – not just for management, but also because ...
- Library efficiency measures and statistics will assume a streamlined management process (whether true or not)

## What we can expect (3)

- Increased demand on content providers from ERMs and Libraries for rapid implementation of SUSHI, License Expression transmission, etc.
- Increased transparency from content providers on pricing (esp. titles within packages) for meaningful cost-per-use numbers
- Perhaps leading to the demise of aggregator packages (eventually) ???

# Ted's Top 5 Standards Wish List

5. Standard for Communicating IP address changes to Content Providers
4. Standard for Vendors to communicate real-time availability (that is, advise when you're down and when you're back up)
3. A sub-library level unique library identifier – something like the SAN but international in scope. ISO 15511 (ISIL) doesn't do it ...
2. A unique collection identifier for aggregations and databases: like an ISBN per e-package



## Ted's Wish List (2)

And the #1 ERM-related area needing a standard:

ACQUISITIONS – a set of standard structures that would encapsulate elements relevant to an acquisitions transaction:

- Order record
- Invoice record
- Vendor information (selected)
  
- X.12 and current EDI doesn't do the job

## In conclusion

- E-products have changed what libraries purchase
- Previous models for automated library management are changing, largely because of e-products
- The ERM will be the nexus/crossroad/bridge between legacy systems and the e-product world
- The ERM will ultimately supplant the ILS for many (perhaps even most) back-room functions

Thank You!

Ted Koppel

Verde Product Manager

[ted@exlibris-usa.com](mailto:ted@exlibris-usa.com)

+1.617.332.8800 x601

