With the rapid increase of electronic resources in the contemporary library environment, technical services departments are forced to look at their workflows and policies to manage this great change. Staff are spending more time than ever managing electronic resources, and the need to manage subscriptions in a different way has many libraries opening new positions titled “Electronic Resource Librarian,” or re-allocating staff to cover the need. Public services staff members have new challenges, too—from honoring license agreements through the course of their work to ascertaining whether or not their libraries have current subscriptions to some titles.

For the acquisitions and serials unit staff members and faculty, there is much more pre-order work for electronic subscriptions than there is for print versions. Journals bought as part of a package may have to be ordered as individual subscriptions if the package changes; vendors may change when the library negotiates for a better package deal. Issues related to implementing the subscription have also changed. Libraries no longer wait for an invoice and print copies to arrive at their library. Instead, the electronic access is activated from a remote location. Therefore, determining whether the library has access and maintaining that access is different in the new environment. Check-in records no longer prompt the staff that something has gone awry; often a missing issue is not noticed until there is a patron complaint.

Decisions must be made about how to catalog and present these records for public view. Does the library make the decision to catalog each electronic subscription, knowing that the title may be cancelled in the next round of negotiating ejournal packages? Should there be two records for the journal, one for the print and one for the electronic version, or just one?

Public services is also affected by the change. Interlibrary Loan staff members need quick access to licensing agreements in the course of filling requests. Reference staff members need information to help patrons troubleshoot access problems. These questions are increasing, as users call about why they can’t access journals vital to their research. Those users expect knowledgeable answers from reference librarians.

Electronic Resource Management programs (ERMS) are software packages that hold great promise in the management of electronic resources, from subscriptions to licenses to troubleshooting. Some companies are developing products that work with existing integrated library systems (ILS), while others are standalone products. For example, SIRSI and Dynix/Horizon market their product’s strength in working with their ILS products, while ExLibris and Endeavor’s software can be both integrated into the ILS or standalone. Serials Solutions, a management service, offers a product with a great deal of report creation capabilities and easy importing of data, but it cannot integrate with an existing ILS. Even vendors like EBSCO and Harrassowitz offer Electronic Resource Management products (1, 2). A list of vendors currently offering ERMs appears at the end of this article.
All of these products have different features. Libraries will find each system's advantages and disadvantages will vary, depending on the library's ILS, size, and needs. Some only work with the library's ILS. Some standalone products don't allow for customized fields that certain libraries will find useful. Others have restrictive password systems that would not allow many of the library staff to see the data, while others are not restrictive enough with their password management.

One major consideration is whether or not the product will work with your data as it is. If large amounts of data will have to be re-keyed, or transferred to an intermediary format such as Excel spreadsheets, a library may consider waiting to purchase an ERM until they have their data in a transferable form. Alternately, the library may decide that an ERM is not the best choice for them, considering the amount of manual transfer that will have to take place.

Some of the features of different ERMs are: subscription alerts; a single point of maintenance for library staff; the ability to manage URIs (Universal Resource Indicators); password management; access to ordering and licensing information, by both technical and public services staff, while only authorized staff can make changes; report generation in various formats such as MARC, Excel or XML; the ability to work with consortial models or local data; and management of print subscriptions that accompany electronic subscriptions.

The Digital Library Federation (DLF) has written a report outlining guidelines for these products (the DLF ERMI, Electronic Resource Management Initiative) that examines standards, orders, implementation, maintenance, and evaluation of ERMS. Almost all the products on the market or in development use these guidelines in developing their products. The main areas of promise for ERMS, and which are addressed in the DLF ERMI, are selection, ordering, implementation, maintenance, and evaluation.

Each library must decide whether or not such a product will meet its needs and would be worth spending more time training staff to use it. Some libraries may simply decide to reorganize workflows, hire more staff, and/or use a home-grown relational database to meet their needs. For example, Middle Tennessee State University uses an Access-based in-house ERM designed by Melvin Davis.

Other solutions do not provide all the functions that an ERM would, but solve some problems. The state of Georgia designed and implemented their own product, GALILEO Local Resource Intergration (GLRI) that allows libraries across their system to determine access to resources from one location. Smaller libraries get support and training from the librarians at the University of Georgia, where the system is managed. For more information, see http://smartech.gatech.edu/bitstream/1853/10290/3/YoursMineErms.pdf

Some questions to ponder when considering purchasing an ERM are:

1. Is your data in a format that will allow for easy export to an ERM?
2. What features are available now and which are promised?
3. Do you have specialized local data to consider?
4. Will you receive alerts when subscriptions are coming due?
5. Can you pick and choose which features and functions you need, or must you choose an all-or-nothing package?
6. How well does the product work with link resolvers?
7. Does the product meet consortial needs?
8. How much data can be automatically loaded, how much will need to be re-keyed or kept in an intermediary format?

These points will be important to each library as it decides what steps to take to manage the ever-increasing load of electronic resource subscriptions. A place to start might be to investigate the product offered by the company that is your ILS provider. If you are a small library, one of the products offered by a single vendor such as EBSCO might be suitable for your needs. Talking with other librarians in your state or consortium about their work processes and plans for the future would be useful. The Tennessee Library Association
sponsors an Electronic Resources Management Roundtable. For another regional perspective, see APSU librarian Michael Hooper's TLA Annual Conference presentation about ERMS. The presentation was published, along with other conference proceedings, in Tennessee Libraries 56:2.


For Further Reading


**Information about current or upcoming ERMs products**


ExLibris [http://www.exlibrisgroup.com/verde.htm](http://www.exlibrisgroup.com/verde.htm)


Harrassowitz [http://www.harrassowitz.de/ottoserials.html](http://www.harrassowitz.de/ottoserials.html) and [http://www.harrassowitz.de/periodicals_e-journals.html](http://www.harrassowitz.de/periodicals_e-journals.html)


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