

# Electronic Resource Management: The Adventure Continues

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University Libraries  
Bowling Green State University  
Bowling Green, OH

## Our Quest

- Make Electronic Resources better for patrons and easier for staff to manage



# A Long Time Ago ... E-Resources

- **Overall a poor patron experience**
- E-Journals
  - A-Z list in HTML & OhioLINK (EJC)
- Databases
  - HTML page for OhioLINK and Locally Subscribed Resources
  - Separate On-Campus and Off-Campus links
- Ebooks – Only accessible through the catalog
- **Staff**
- Information kept in spreadsheets, ILS records & email
- Tasks distributed based on library organization (haphazard evolution)

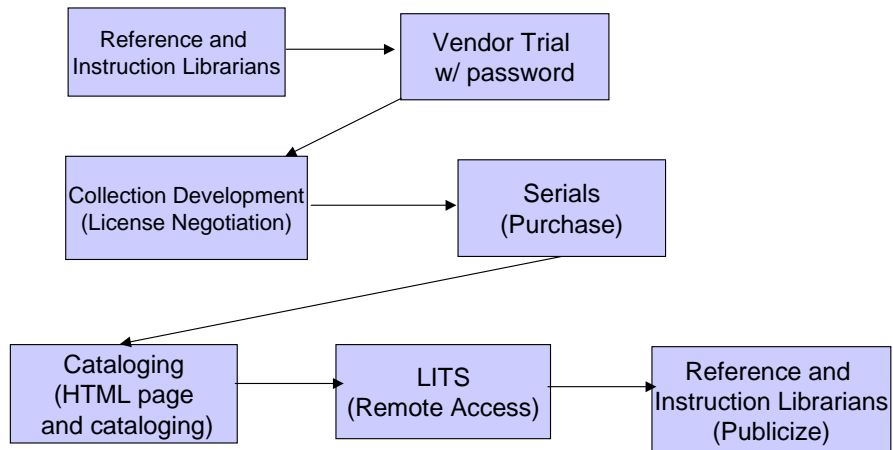
The problem

Spring 04

Two and a half years ago

Number of Employees involved

# A Long Time Ago ... Workflow (1)



3 years ago



## Our Journey Began

- ERM Training in Feb/March 2005
  - Make sure you get on the Innovative ERM listproc
- Databases Implemented in ERM
- E-journal Implementation
  - Purchase Serials Solutions MARC records
  - Evaluate Coverage Load
- Databases Go Live to Patrons - Aug. 2005

## Our Journey Began (2)



- Electronic Resources position
  - ½ time Serials & ½ time Reference / Instruction
  - Centralize work previously distributed
  - Bridge between Technical Services and Reference & Instruction
  - Bridge between LITS and ERM staff
    - Layout / Wording customizations
  - Update / maintain Serials Solutions data
  - Build ERM records

## Our Journey Began (3)

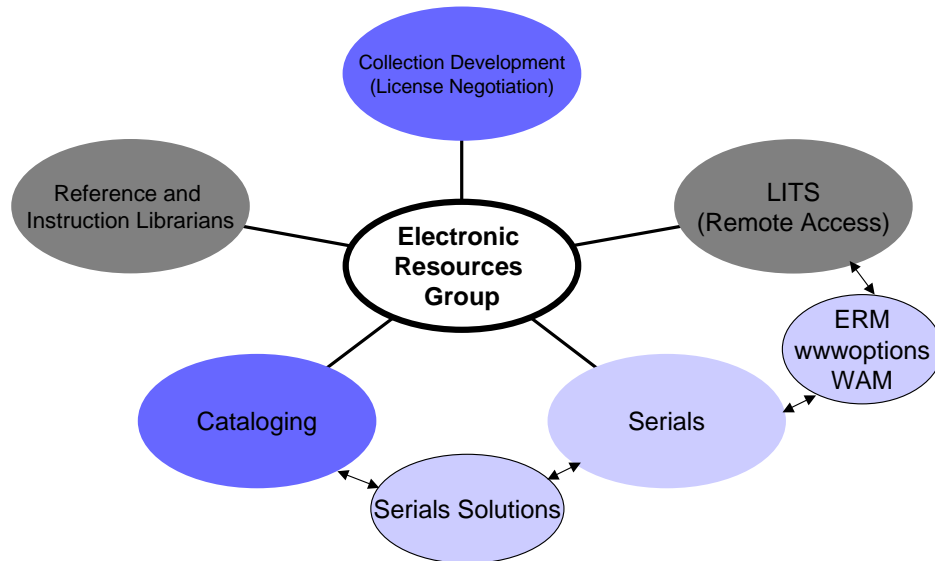


- Electronic Resources Group
  - Chaired by the Associate Dean
  - Collection Development Librarian
  - Reference / Instruction Librarians
  - Web Librarian
  - Cataloging Librarian
  - LITS, ILS Coordinator
  - Serials
- All the players in one place

Who we invited our on the journey / Guide

## Workflow (2)

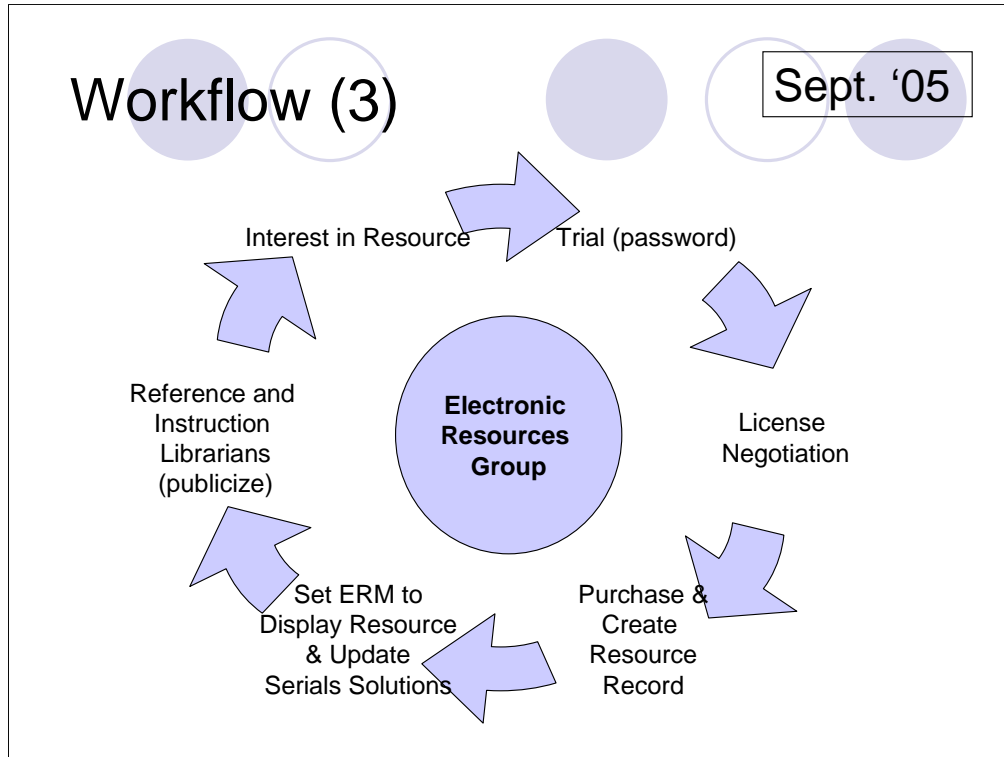
March '05





# Philosophy of Implementation

- Two view points on implementation
  - Make decisions about records before building them, OR
  - Trial method – input data into record and see what happens
- Build one Pilot Record (EconLit)
  - Only one record weird to track
  - Shows others the possibilities for new design/layout



About Sept. 2005

(After we went live to patrons) we

Documented our procedures for work

Moving from people-based to task-based workflow

Notice that Create Resource record gets pushed earlier in Workflow 4

# Learning a New Language

- Resource Records (similar to bibs)
- License Records (new)
- Contact Records (similar to vendor)
- Holdings = Checkin Records

A big part of our Implementation Tale was learning a new language.

We struggled a bit with questions like:

What are these new records?

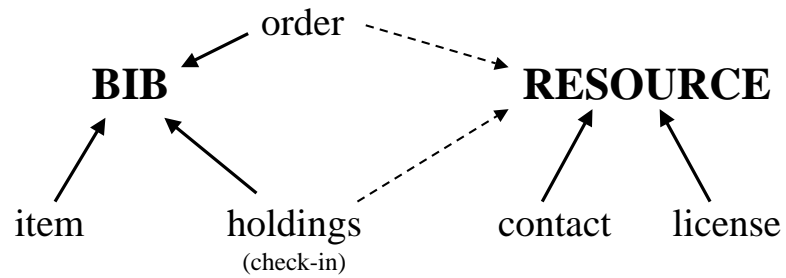
How do they relate to each other?

What can we do with each of them?

We'll look at each of these individually, but just briefly, ERM gives you:

SLIDE

# Record Relationships



Used with permission  
Rocki Strader  
The Ohio State University

We used this Record Relationship graphic that shows that  
Resource Records = Bib  
Contact and License are linked to Resource  
Holdings are soft-linked to Resource and live in Bibs

# Resource Record

The screenshot shows the Millennium ERM interface for a resource record. The title bar indicates 'Millennium Electronic Resource Management - Jerome Library - Bowling Green State University - e10000021'. The interface includes a menu bar (File, Edit, View, Go, Tools, Admin, Help) and a toolbar with icons for Print, View, Edit, Summary, Browse, Print, and Close. A left sidebar contains icons for Millennium, Catalog, Coverage Load, Coverage Edit, Contacts, Global Update, Create Lists, and Title Overlap. The main area displays the following information:

**Resource Record: e10000021**  
 Last Updated: 06-27-2005 | Created: 01-06-2005 | Revisions: 25

Rights Type	I LICENSED	Package Type		Termination Date	--
Suppress	DISPLAY NORMAL	Trial Begin Date	02-24-2005	Access Provider	ebSCO EDSO Publishing
Resource Code 1		Trial End Date	--	Publisher	aea American Economic Association
Resource Code 2		Renewal Date	--	Copyright Holder	none
Resource Code 3		Registration Date	--	Data Provider	none
Resource Code 4		Activation Date	--	Consortium	ohio OhioLINK
Resource Status	ACTIVE				

**Content:**  
 i EconLit  
 d Business & Economics  
 b Index to Journal Articles  
 y <http://search.ebscohost.com/nautilus/bgsu.ohioLINK.asp?ref=ohio-link&defaultr=ecol>  
 h 1969 to present  
 a Joanne or Linda  
 r Christy  
 n This database is licensed for use only by students, staff, and faculty of Bowling Green State University.  
 n Update Schedule: Monthly  
 s Pricing and payment information  
 e EconLit covers the international literature on economics and provides bibliographic citations, with selected abstracts, of journal articles, books, dissertations and working papers, as well as articles in collective works such as conference proceedings, collected essay volumes and full text book reviews. Topics include economic development, forecasting, and history; fiscal and monetary theory; business and public finance; international, health care, regional and urban economics, and more.

**Contract:**  
 p EconLit  
 c Name: Test  
 Event Date: 20050223  
 Fixed Field Date: 20050223  
 Sent to: mstrang@bgsu.edu  
 Subject: Test resource specific tickler  
 Header: some header  
 Footer: some footer  
 c Name: Contract End  
 Event Date: 20050223

At the bottom, it shows 'e10000021' and a 'View Only Mode' button.

For those of you who have Millennium, this will look familiar

Tags vs. Labels

Title

Description

Subjects

URL

Notes

Staff

Public

Contact fields map to ...

Date Fields map to Ticklers which you can set up to email you a reminder (based on date) of events such as Renewal or Trial End

Release 2006 = Tickler in Order and Checkin records

Service Commitment

Date based tickler not automated like the ERM tickler (automated as in it will tickler any field you fill in)

Item by item only

# Resource Record Fields

- Resource information
  - rights type (click through, licensed, no license, etc)
  - resource status
  - package type
  - trial begin & end dates
  - renewal date
  - registration date
  - activation date
  - termination date
  - *access provider*
  - *publisher*
  - *copyright holder*
  - *consortium*
  - *data provider*
- --- subject
  - resource format
  - resource URL
  - coverage
  - local contact
  - additional contacts
  - notes about the resource
  - pricing & payment information
  - resource description
  - resource ID
  - resource advisory
  - tickler log
  - incident log

We didn't use them all!

You may see something on this list that jumps out at you ...

There's some problem you're trying to solve at your institution

Ours was to move from an HTML list to ERM for databases  
and  
continue to capture the same information

Resource Advisory and Incident Logs for DB problems - show on screen

# License Record

Millennium Electronic Resource Management - Jerome Library - Bowling Green State University - I10000240

File Edit View Go Tools Admin Help

**Edit Functions**

Insert Save View Edit Summary Browse Print Close

Millennium

Catalog

Coverage Load

Coverage Edit

Contacts

Global Update

Create Lists

Title Overlay

I10000240

Resource Name: EconLit  
 Notes: This database is licensed for use only by students, staff, and faculty of Bowling Green State University.  
 Update Schedule: Monthly  
 Resource URL: <http://0-search.eznet.com/maurice.basu.edu/login.asp?profile=web&defaultdb=econ>  
 Coverage: 1969 to present  
 Pricing & Payment: Pricing and payment information

Summary Record I10000240 Contacts Financial Usage Statistics

I10000240 Last Updated: 07-14-2005 Created: 06-27-2005 Revisions: 6

Confidential	PRICE ONLY	Warranty	d TO DISTRIBUTE	License Code 2	
Auto Renew		Disability Compliance	- NONE	License Code 3	
Status	v VALID	Indemnification	- NONE	Concurrent Users	999
Type		Law & Venue		Licensee Sign Date	- -
Breach Cure Period	30	User Confidentiality	u UNKNOWN	Licensee Sign Date	- -
Perpetual Access	n NO	Suppression	- DISPLAY NORMAL	Contract Start Date	- -
Archival Provisions		License Code 1		Contract End Date	- -

e University Libraries  
 o Linda Brown  
 y Dean's Office  
 f BG and Firelands campuses  
 u BGSU Faculty, Staff, Students, and Walk-in Users  
 w Licensed for BGSU academic use only; any commercial use prohibited.  
 b Users may make one print or temporary electronic copy of a reasonable amount of data for personal use only.  
 x Systematic copying expressly prohibited. Database content may not be distributed to non BGSU users.  
 t Staff permitted  
 v Restricted for staff (test)

I10000240 Edit Mode (OVR)

Breach Cure period

Indemnification

Other Legalese

Authorized Users – especially useful for multi-location campuses

## License Record Fields

- License information
  - confidential information
  - breach cure period
  - perpetual access
  - archival provisions
  - indemnification
  - governing law
  - user confidentiality
  - concurrent users
  - licensee sign date
  - licensor sign date
  - contract start date
  - contract end date
- --- licensee
  - negotiator
  - license location
  - authentication method
  - site definition
  - authorized users
  - remote access
  - use permissions
  - use restrictions

Boilerplate Language “Systematic copying is expressly forbidden”

Dates for a Ticklers



# Contact Record

The screenshot displays the Millennium ERM software interface. The title bar reads "Millennium Electronic Resource Management - Jerome Library - Bowling Green State University - 110000367". The menu bar includes File, Edit, View, Go, Tools, Admin, and Help. The main window is titled "Contact Maintenance". On the left is a sidebar with icons for Millennium, Catalog, Coverage Load, Coverage Edit, Contacts, Global Update, Create Lists, and Title Overlay. The main area shows a contact record for "Ebsco Publishing (test record)". The record includes fields for Contact Code (ebsco), Organization Name (Ebsco Publishing (test record)), and a list of roles and contact information. The roles listed are Customer Service, John O. Public, Technical Services, and Mary W. Public, Sales Support. Each role has associated phone, fax, and email information. The address is listed as 123 Merry Dr., Columbus, OH 43123. The record also includes a list of keywords and a list of entries.

Field	Value
Contact Code	ebsco
Organization Name	Ebsco Publishing (test record)
Role Name	Customer Service (for all customers worldwide)
Phone	1-800-123-1234
Role Name	John O. Public, Technical Services
Phone	1-800-123-4455
Fax	1-800-123-4568
Email	jpublic@ebsco.com
Notes	current as of 9-05
Role Name	Mary W. Public, Sales Support
Phone	1-800-123-4567
Fax	1-800-123-4568
Email	mpublic@columbus.ebsco.com
Notes	current as of 8-03
Address	123 Merry Dr. Columbus, OH 43123
Keywords	1-800-123-4567 1-800-123-4568 demo@ebsco.com <a href="http://www.ebsco.com">http://www.ebsco.com</a>

Name

Address

Phone / Fax / Email

of Company

Can also keep this information of individuals at the company

Change our "A" field into a Multi-Line Variable Length field.

# Contact Record Fields

The screenshot shows a software window titled "Insert a non-MARC field" with a blue title bar and a red close button. The window contains a form with a dropdown menu on the left and a table of fields on the right. The dropdown menu is currently set to "a Contact Person". The table has five rows: "Role/Name", "Phone", "Fax", "Email", and "Notes". Each row has a corresponding text input field. At the bottom of the window, there are "OK" and "Cancel" buttons.

Role/Name
Phone
Fax
Email
Notes

- Contact information -- position, phone, fax, email and notes for each contact can be listed and available to all staff
  - sales contact
  - technical support
  - customer support

Changes to "a"

Contact information available to all staff

We don't know if this is the default yet or if you need to ask for this through the Service Commitment

# Holdings Record

The screenshot displays the Millennium Electronic Resource Management (ERM) interface. The main window is titled 'Bib Record - c1240523'. It shows a record for 'EconLit' with the following details:

- Resource Name:** EconLit
- Coverage:** 1969 to present
- Resource URL:** <https://search.proquest.com/econlit>
- Additional Contact:** Jeanne or Linda

The 'Summary' tab is selected, showing a table of holdings. The table has columns for 'HOLDING', 'RECORD', and 'LOCATION'. The first row shows a holding with record 'c1240523' and location 'nk'.

Below the table, there is a section for 'MARC Leader' and 'MARC Data'. The MARC Leader contains the following information:

- Label Type:** NO LABEL
- Label:** NO LABEL
- Location:** nk Internet
- Serials:** SERIALS
- Vendor:** none none
- PCOUNT:** 0

The MARC Data section contains the following information:

- Label Type:** NO LABEL
- Label:** NO LABEL
- Location:** nk Internet
- Serials:** SERIALS
- Vendor:** none none
- PCOUNT:** 0

Date Coverage

Manually or through Coverage Load

Makes likes so that license info from R R shows on Bib record titles

Define terms – Fixed fields in records

Access Provider / Data Provider / Publisher

Contact Codes – Naming convention

License

Status must = Valid for info to show in the catalog

# Innovative ERM WebOPAC interface (search/y)

The screenshot shows the 'University Libraries @ BGSU' WebOPAC interface. At the top, it says 'Find Articles: Research Databases'. Below this, there is a search section with the prompt 'Type the first 3-4 letters of the database name:' followed by a text input field and a 'FIND' button. To the right of the search section, there is a list of 'Databases arranged by subject:' with a scrollable menu containing categories like 'Arts & Music', 'Biography', 'Business & Economics', 'Dictionaries, Encyclopedias, Directories & Almanacs', 'Diversity, Ethnic & Gender Studies', 'Education and Library Science', 'Health, Medicine & Sports', 'History', 'Image & Media Databases', 'Interdisciplinary', 'Law & Political Science', and 'Literature & Languages'. Below the search section, there is a section for 'Databases arranged alphabetically by title:' with a grid of letters: A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z. At the bottom of the interface, there is a navigation bar with links: 'Ask-A-Librarian', 'Need Help?', 'New Books', and 'Suggestions/Comments'. The footer contains the 'BGSU Libraries' logo, contact information for Bowling Green State University, and a copyright notice for 1999-2006.

These are screen shots from 2005 (not WebPac Pro 2006)

Subjects are not LC and not indexed with other subjects.

This was done because our Reference Faculty wanted to preserve the non-LC subjects they were using on the HTML pages.

*(Mark also talks about this)*

We had ERM Subjects included in our AVS Keyword Search, but it takes a bit of work

Also explained in our WWWoptions handout

# Database Implementation

- Learning the Language
- Customizing / Shaping the records
  - Layout
  - Phrasing
  - WWWOptions, briefcit.html, and ILS Public Display
- Review the implications and consequences of decisions
- Input the data
- Remember – Yearly Releases

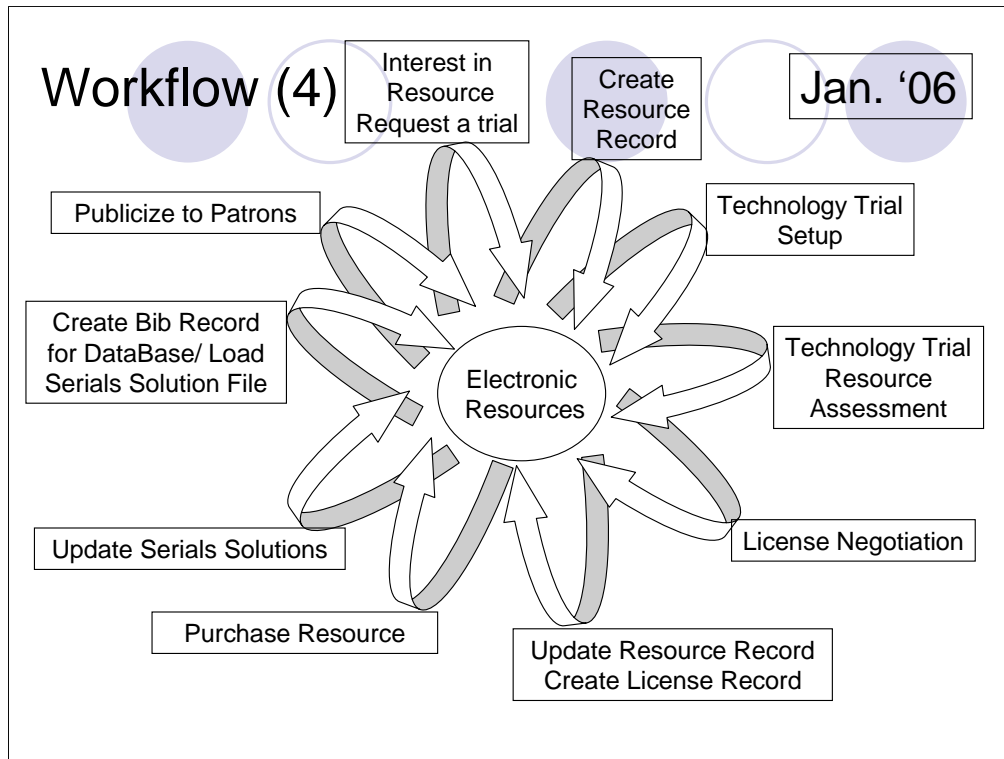
Phrasing – License / Resource Record  
so that you can search easier

You can control **which fields display** and the **titles of the fields** by using  
wwwoptions

Packet - end of the presentation and included in our Advance  
Materials

Live Aug 05 – Up for Fall Semester

Remember that ongoing updates (2005 to 2006) forces you to tinker with the  
wwwoptions again.



Disbanded

Work rolled back into the Innovative Sub Group as needed



## Lessons Learned

- Institutional Memory
- Keep old info for historical purposes
  - New databases added to ERM due to OhioLINK's new EBSCO deal
  - Old databases
    - Status set to "inactive"
    - Note in the record
    - Suppress set to "no display"
- Trials
- EBSCO URL update – Serials Solutions

We decided to keep the defunct data as a historical record so that this information is in the catalog and not in people's emails.

### EBSCO

Epnet to ebscohost URL change resulted in more than 9000 URLs updated by Serials Solutions

Even if you have ERM, you still need Serials Solutions or CASE to manage your electronic journals

We lost 16 databases (lost, incorporated into others, or upgraded to FT)

We gained 27 databases

(I got this info from <http://www.ohiolink.edu/ostaff/ref/ebsco-2006.html>)

# Technology Trial – IP-based

- Resource Assessment
  - Uniform patron access experience (on & off campus)
  - Test your local remote access solution with vendor
  - Sales Rep will advocate for the technology help (*before* they get paid)
- Cost Negotiation
  - If remote access is problematic you may be able to negotiate a lower price
- License Negotiation
  - Can you meet the licensing terms of your vendor?
    - On & off campus users must authenticate; no public use
    - Limited to buildings on campus; no wireless access

Mintel

ValueLine

Factiva – took a long time but it worked

DRAM – should have done it before we paid

ebrary – additions and deletions

Signal to go faster AFTER this slide



## Keeping Up With the Work

- Two years ago
  - ½ time position dedicated to implementing ERM
  - LITS (very active)
  - E-Resources Group
- Current (still trying to get all the data in there)
  - ½ time position
  - New classified staff full-time position
  - Beginning to develop a proposal for a new faculty position
  - New LITS coordinator

Number of Employees Involved

Get information out of emails

We are Developing a Proposal for a new full-time position to shepherd the Electronic Resource process.

# Electronic Troubleshooting Team

University Libraries @ BGSU

Logout

My Library

Start Over

Help

You are logged into staff mode at Jerome Library -- Bowling Green State University as Smith, Mary

WORD

AUTHOR

TITLE

SUBJECT

RESOURCE NAME

WORD

inaxos

Search

to items available for checkout

Requests

Reading History Information

Help with Renewals

Help with Preferred Searches

Mary

Library

(419) 372-2051

circdesk@bgsu.edu

EXP DATE: 12-15-2006

Modify Your PIN

Preferred Searches

My Reading History

My Record Feeds

Sort By Due Date

Renew Selected

3 ITEMS CHECKED OUT

RENEW	TITLE	BARCODE	STATUS	CALL NUMBER
<input type="checkbox"/>	<a href="#">Yionettes from the Chinese : lithographs from Shanghai in the late nineteenth century / edited and t</a>	A11346280842	DUE 09-20-06 FINE(up to now) \$3.00	NE2383 .V54 1987
<input type="checkbox"/>	<a href="#">Lillian Gish : a life on stage and screen / by Stuart Oderman</a>	A11350235559	DUE 09-20-06 FINE(up to now) \$3.00	PN2287.G55 O34 2000
<input type="checkbox"/>	<a href="#">Origins : genesis, evolution and</a>	30501003417335cd3bg	DUE 10-11-06	576.83 O71

# Electronic Troubleshooting Team

Staff View

Another Search

(Search History)

RESOURCE NAME

navos

System Sorted

Search

Save as preferred search

☐ Limit to titles which aren't in my Reading History

☐ Limit search to items available for checkout

Result page: 

PREVIOUS

NEXT

### NAXOS Music Library

Resource Name	NAXOS Music Library
Description	NAXOS Music Library Includes more than 5,500 CDs from five genres: classical music, contemporary jazz, world/folk music, new age, and Chinese music.
Resource Format	Images and Digital Media
Subject	Arts & Music
Public Note	Image & Media Databases Best viewed using Internet Explorer. Minimum system requirements exist. If you are having problems access this resource, please call the Music Library 419-372-2307.

Persistent link to this record:  
<http://maurice.bgsu.edu/record=e61000124a>

Authorized Users	BGSU Faculty, Staff, Students, and Walk-in Users
Permitted Use	Users may make one print or temporary electronic copy of a reasonable amount of data for personal use only.
Restricted Use	Systematic copying expressly prohibited. Database content may not be distributed to non-BGSU users.

Title	Coverage online	Click for full text
Naxos music library [electronic resource]		<a href="#">Resource Record for NAXOS Music Library</a>

# Electronic Troubleshooting Team

RECORD #
e1000124

☐ Limit to titles which aren't in my Reading History  
☐ Limit search to items available for checkout

<b>E10001244</b>		<b>Last updated: 10-02-06</b>		<b>Created: 04-06-05</b>		<b>Revision: 16</b>	
<i>Rights Type 1</i>	Suppress -	<i>Resource Code 1</i>	<i>Resource Code 2</i>				
<i>Resource Code 3</i>	<i>Resource Code 4</i>	<i>Resource Status -</i>	<i>Package Type</i>				
<i>Trial Begin Date - -</i>	<i>Trial End Date - -</i>	<i>Renewal Date - -</i>	<i>Registration Date - -</i>				
<i>Activation Date - -</i>	<i>Termination Date - -</i>	<i>Access Provider</i>	<i>Publisher <a href="#">naxos</a></i>				
<i>Copyright Holder</i>	<i>Data Provider</i>	<i>Consortium <a href="#">ohion</a></i>					

**ERM INFO**

*Resource Name* NAXOS Music Library

*Subject* Arts & Music

*Subject* Image & Media Databases

*Resource Format* Images and Digital Media

*Resource URL* <http://0-BGSU.NaxosMusicLibrary.com.maurice.bgsu.edu>

*Notes* 10/02/06 kmb Fallon reported nonworking 8:00 a.m. 9/30/06 get prompted for username/password

*Notes* <http://0-ohiolink.naxosmusiclibrary.com.maurice.bgsu.edu> This is the old URL as of 7/25/06.

*Notes* Database Producer: Naxos Digital Services

*Notes* This database is licensed for use only by students, staff, and faculty of Bowling Green State University.

*Notes* Update Schedule: Continuously

*Notes* **On campus use is not working 8/25/06. Off campus users appear to be able to play music properly.** Please note: off-campus access may be superior to on-campus access. 08/28/06 cmr

*Access Information* According to Mike Smith (ITS),\* we don't have the bandwidth available for an entire class to be browsing and listening at once.\* He also recommends that students use 64K stream instead of the 128K. An FYI from Mike: "since these servers are located in Hong Kong, there are 23 routers and networks between BGSU and the servers. If anyone of these is having slow-downs or heavy traffic, it could affect the streaming.\* cmr 08/28/06

info for Naxos servers in Hong Kong added to campus network changer by Mike Smith 8/28/06 Naxos Music Library

# Electronic Troubleshooting Team

University Libraries @ BGSU

Logout

My Library

Start Over

Help

You are logged into staff mode at Jerome Library -- Bowling Green State University as Smith, Mary

Previous Screen

T10000677	Last updated: 08-29-06	Created: 07-25-06	Revision: 3
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CTACT INFO

Contact Code

Organization Name

Contact Person

Address

Note 1

naxos

Naxos

Pearl Amanfu, Account Representative, Naxos Licensing and Content Services \$615-771-9393 ext. 30 877-629-6723 ext. 3818 \$e-fax: 775-415-2529\$pamanfu@naxosusa.com\$7/25/06

Naxos Music Library\$416 Mary Lindsay Polk Drive, Suite 509\$Franklin, TN 37067

Pearl is the contact for "...user-related questions and/or technical inquiries..." 7/25/06 jml

Previous Screen

Ask-A-Librarian

Need Help?

New Books

BGSU Libraries

University Libraries

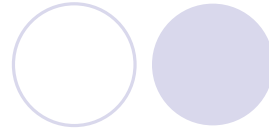
Bowling Green State University , Bowling Green, OH 43403, Phone Number

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BGSU

## *There is no happy ending in Electronic Resources*



- Strang, Mark; Reineck, Christine. “**A Pictorial Guide** to Innovative ERM Records, wwwoptions, and some ‘.html files”
  - At IUG Clearinghouse
  - <http://innovativeusers.org/cgi-bin/clearinghouse/view.pl?id=123>
- **Innovative ERM: An Implementation Tale**
  - Presented at IUG Denver, CO in May 2006
  - <http://innovativeusers.org/iug2006/programs/M8>

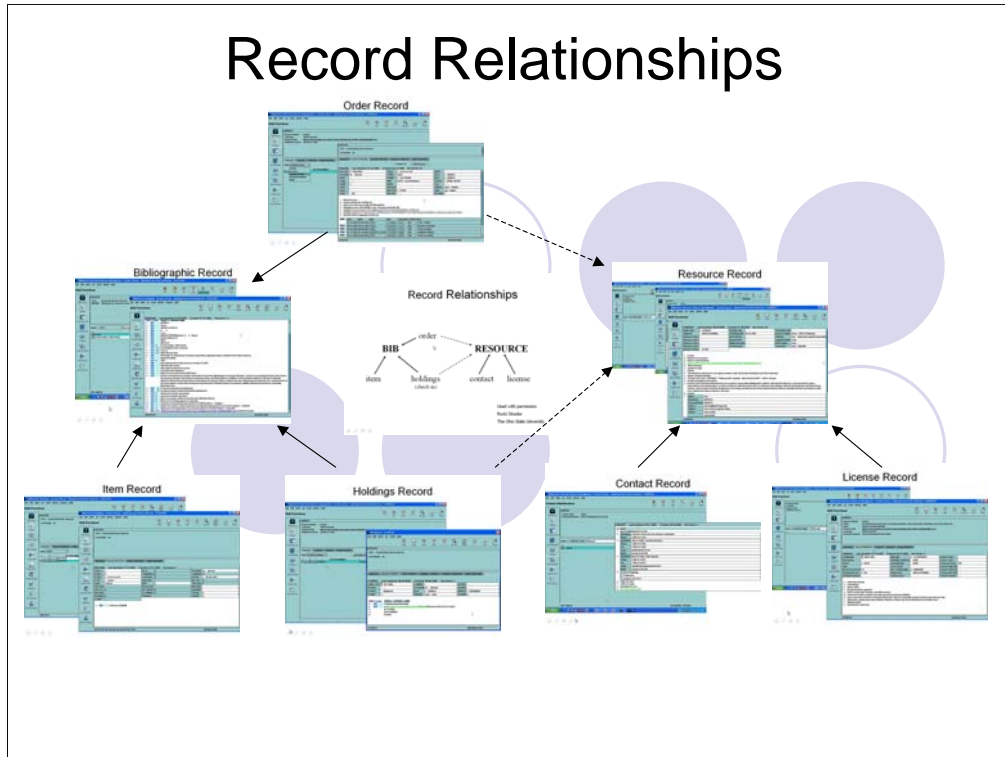
# Thank You!

- Mark Strang, Data Systems Manager
  - mstrang@bgsu.edu, 419-372-0323
- Christy Reineck, Electronic Resources Associate
  - creinec@bgsu.edu, 419-372-3309

## *For More Information*

- BGSU's library home page
  - <http://www.bgsu.edu/colleges/library/>
- A-Z list for Databases
  - <http://maurice.bgsu.edu/search/y>
- A-Z list for Journals
  - <http://www.bgsu.edu/colleges/library/ejournals.html>

# Record Relationships



Poster

Slide of Screen shots

We used this Record Relationship graphic that shows that

Resource Records = Bib

Contact and License are linked to Resource

Holdings are soft-linked to Resource and live in Bibs