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ERMes: Open Source Simplicity for Your E-Resource Management

By William Doering and Galadriel Chilton

Background

For the September 2008 issue of *Computers in Libraries*, we wrote the article: "A Locally-Created ERM: How and Why We Did It" in which we described our new, locally created, and freely available ERM. We discussed how we struggled to manage our 200+ electronic resources, and how before the ERM we were using disparate means of managing some e-resource data (e.g. static web pages, spreadsheets, e-mail and manila file folders) while we had no organizational structure for other data; there was no single place to enter and efficiently access e-resource information.

The ERM database was simple and very basic, but large and small libraries were immediately interested. It seems that either libraries do not have the money to spend on a commercial ERM, or these commercial ERMs are not meeting libraries' needs. Alternatively, perhaps there was appeal because the ERM was open source.

Regardless of reason, as of July 3, 2009, 19 institutions are using the Microsoft Access-based ERM: Carleton College, Deerfield Academy, Georgia Perimeter College, Gustavus Adolphus College, Illinois Wesleyan University, Iowa State University, Monterey Peninsula College, National Defense University, National Science Foundation, Northern Michigan University, Ripon College, Rivier College, SUNY-Rockland Community College, University of Idaho, University of Wisconsin-Eau Claire, University of Wisconsin-La Crosse, University of Wisconsin-Parkside, Viterbo University, and the Wisconsin Department of Employee Trust Funds.

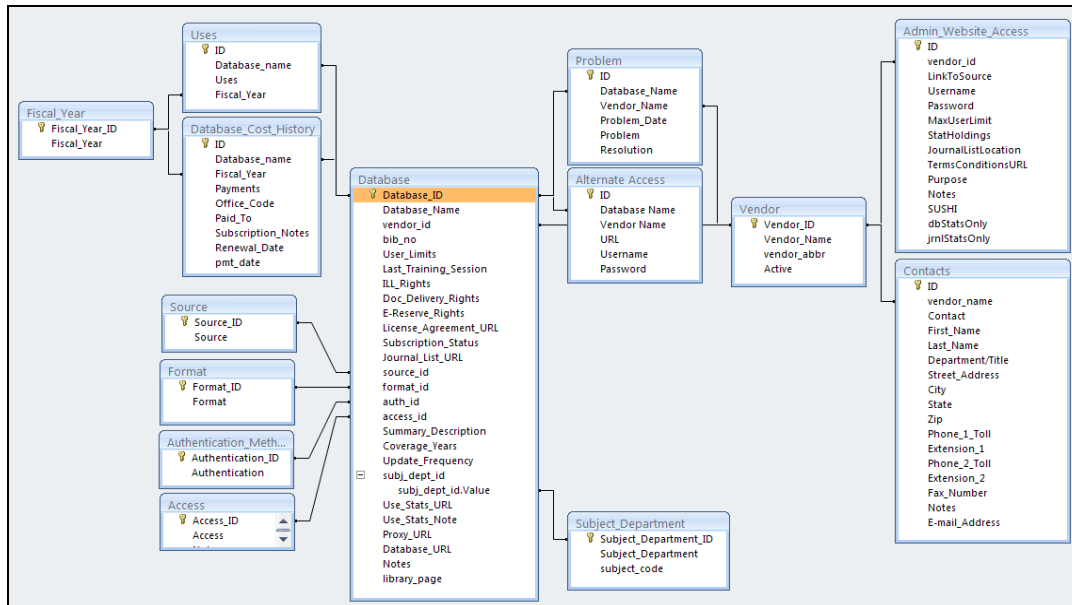
Following are key developments from the past year:

- In May 2009, a new, and significantly improved version was released.
- The ERM was named "ERMes".
- The new version includes code contributed by two more librarians (Jenifer Holman, University of Wisconsin, La Crosse and Norma J. Dowell, Iowa State University).

- ERMes support systems and communication venues include improved documentation (<http://murphylibrary.uwlax.edu/erm/>), a blog (<http://ermesblog.wordpress.com/>), and most recently, a user-to-user forum via Google Groups (<http://groups.google.com/group/ermeserm>).
- We have also presented ERMes at three conferences and distributed information via numerous listserves and newsletters.

ERMes' Functionality

ERMes is a relational database; content in different tables connects to, and works with, content in other tables. ERMes requires Access 2007 (Windows) or Access 2008 (Mac) to operate, as the database utilizes functionality not available in previous versions of Microsoft Access. The previous version that uses Microsoft Access 2003 (Windows) is still available, but does not include the new interface or improved functionality of the latest version.



ERMes tables, field names, and relationships to other tables

By far, the latest version's new interface and code provided by Norma J. Dowell at Iowa State University are the biggest advancements. In addition to a completely new and more intuitive interface, highlights of the latest release include two means of entering use statistics (manually or importing COUNTER reports), and an initial attempt at functionality to help manage e-journals title-by-title.

Highlights of ERMes functionality include:

- Vendor names (comes pre-populated with a core list) with multiple library-defined contact types (sales, accounts, support, etc.) possible for each, with fields to enter all the logical contact information.
- ERMes has the ability to capture simultaneous user limits, authentication methods, subscription status, and subject area or department affiliations.
- Rights statements for ILL, document delivery, and e-reserves.
- URL links to journal lists, license agreements, and user stats.
- Track database/vendor incidents such as downtime, missing content, etc.
- Alternate login information for training access, for faculty members and students who are not yet in your authentication system, or who are not able to gain access through your authentication system.
- Hyperlinked A-Z list of databases for posting on a library web page.

ERMes also includes these reports:

Report	Description
Renewals for Date Range	Lists all databases for which the renewal date in the Database_Cost_History table falls between a user-specified range . Use this report to determine what renewals you have outstanding and for which you need to make a renewal decision.
Year-to-year Price Comparison	Shows the price increases for databases between two fiscal years that the user specifies.
Payments	Generates a list of all payments for all databases by fiscal year.
Payments Crosstab	Shows a spreadsheet view of all payments made for all databases. This report is only available from the switchboard.
Database Uses for Fiscal Year	Calculates a cost per use for each database by the user specified date range. This assumes you have manually entered the use

	statistics into ERMes
COUNTER DB1 By Year	Generates a use report based on COUNTER DB1 statistics.

As a simple ERM, ERMes comes pre-populated with vendor names, but does not have a robust knowledge base. Additionally, enhancement ideas from users keep coming! For example, we are looking into adding workflow checklists as well as data fields for distributor information, account/invoice numbers, additional access URLs (e.g. proxied, unproxied, LibData/Metalib), database description, and FTE or user population by year. Larger enhancement possibilities that we are investigating include creating a web overlay (e.g. ASP) for ERMes so that users could access and update it via the web. Before moving forward, we will survey users to help us prioritize enhancements.

However, one of the benefits of ERMes is that, as an open access system, any user can tweak their instance so that it meets their library's electronic resources needs. Furthermore, we hope that via the ERMes blog and the ERMes Group, theoretical and practical conversations about managing electronic resources will abound and help guide ERMes' development and help us discover and resolve any problems with ERMes.

Future Development

Our goal is to include new features based on direct requests by librarians using ERMes and managing electronic resources. So far, this has kept blot code to a minimum and helps ensure that ERMes is simple and powerful.

Getting Started

Go to the ERMes web site (<http://murphylibrary.uwlax.edu/erm/>) to get instructions and a link through which you can download the database. You only need Microsoft Access to get started; if multiple staff need to use ERMes, just put it on a network drive. You need no other software.

ERMes User Feedback

Recently, our acquisitions and periodicals librarian, Jenifer Holman, commented “I am excited that ERMes will give me a simple way to communicate our ILL rights to librarians. This functionality will solve a real problem in that our ILL staff currently have no way to easily discern which of our electronic journals can be loaned, which cannot, and which must be printed prior to loan. I hope to add that information yet this summer and create another simple ASP interface so that staff can easily look-up that information at their point of need.” While another University of Wisconsin librarian states “William Doering, Systems Librarian at UW-La Crosse has developed an ERMS, called ERMes, using Microsoft Access. It is free to use, and more importantly, it meets our needs as a small campus.”

-- Qinghua Xu, Electronic Resources Coordinator, UW-Parkside, as quoted from the ERMes Blog

For Galadriel, the benefit of ERMes was especially apparent one day when she had to leave her office at precisely 4 pm to catch the bus, but on her way out the door received word that several databases were down and that training access for another database was needed by 8:30 am the next day. From the bus stop, Galadriel opened ERMes to quickly retrieve contact and account information, and then used her cell phone to make a series of calls. Both the access and training issues were solved in less than 15 minutes - before Galadriel transferred buses – in large part because the needed information was all in ERMes.

When Galadriel and William asked ERMes users for feedback, they received the following comments. Because ERMes is still relatively new, users’ comments – like Galadriel’s initial response – reflect the benefit of having e-resource management data in one place.

“In the past, my library's electronic resources management system has been dispersed across a multitude of spreadsheets, databases, e-mail folders, and paper files. We've been using one spreadsheet for subscription information, another for vendor contact information, another for administrative and usage statistics URLs and usernames/passwords, and another listing proxied, non-proxied, and LibData database URLs. We've used spreadsheets and Access databases to manage usage statistics. We've used e-mail folders to store correspondence with vendors and library consortia representatives, and paper files to store copies of licenses, invoices, and other documents. Needless to say, this dispersed system has been cumbersome and inefficient. This past academic year, we looked into a variety of options for ERM systems. While we were intrigued by some commercial ERMs, we simply could not justify paying for an ERM as we were facing tight budgets and considering cutting our library acquisitions – from books to journals to database subscriptions. We were very excited to learn about ERMes in *Computers in Libraries* and we have decided to implement it as our ERM. While we are still in the implementation phase, ERMes has already made our system more efficient. I love the fact that I can now go to one place (ERMes) to locate a database's cost history, to find out how many simultaneous users

are allowed, and to link to the database administrative site to download usage statistics or customize the interface. We greatly appreciate the willingness of the librarians at UW-LaCrosse to make ERMes an open source product, and have found them to be very responsive to questions and enhancement requests. We look forward to moving ERMes into full implementation and becoming active ERMes users!”

-- Anna Hulseberg, Academic Librarian, Gustavus Adolphus College

“When I took over responsibility for our electronic resources, we had a handful of databases, a paper contact list that wasn't entirely current, and that was pretty much it. In terms of electronic resources, management there was nowhere to go but up. I made do with a few contact lists and spreadsheets in Word and Excel, but by early 2009 our resource list was growing and it was becoming apparent that we needed a more robust management system. However, I just didn't feel that we'd reached the point where the expense and effort of a full-fledged ERM was completely necessary. I'd resigned myself to creating an Access database, so I was thrilled to discover that someone had already done it for me. ERMes has fit my needs perfectly. It was very simple to get off the ground, and has greatly expanded my reporting capabilities. My colleagues are thrilled with the reports, and I've especially enjoyed how much ERMes has simplified my vendor contact management. I plan to install the latest incarnation of ERMes soon and can hardly wait to see what further improvements await!”

-- Tessa L.H. Minchew, Systems/Catalog Librarian, Georgia Perimeter College

“ERMes has helped us more closely keep track of usage of databases as well as compile a one-stop source for vendor information. During a recent electronic resource cancellation project, a significant amount of duplication was found with the help of ERMes while we also recognized which databases our users were applying the most to their research. We could then identify where we could cut little used resources in favor of keeping significant ones. As a result, consideration is being made to provide more departments with access to ERMes, which will furnish portable data sets to interested stakeholders that can be moved to other applications more readily than our current system of spreadsheets and documents scattered throughout the library. While our overall use of ERMes is still in its infancy, I predict increased use by more departments over time. Until then, ERMes has proven to be a valuable, time-saving addition to our department.”

-- Norma J Dowell, MSIT, Library Assistant IV, Iowa State University

What does ERMes look like?

Electronic Resources Manager

**DO NOT CHANGE DATA
ON ANY OF THESE
FORMS UNLESS YOU
KNOW WHAT YOU ARE
DOING!!!**

Enter new data for these first:

Preliminary Information

Vendors (must be added here first!)

Vendor Contacts

Subject Departments and Codes

Databases (must be added here first!)

Then Choose one of the following

Edit and Retrieve Information

Vendor Stats Access

Database / Cost History

Alternate Access

Problem Log

Admin Website Access

Reports

Renewals for Date Range

Year to Year Price Comparison

Payments

Payments Crosstab

Statistic Reports

COUNTER DB1 By Year

ERMes' Switchboard

Navigation icons: Home, Previous, Next, First, Last, Print, Add, Refresh

Database: PressDisplay (NewspaperDirect)

Vendor Name: ProQuest/CSA

Source: Local

User Limits: Unlimited

Subscription Status: Active

Format: Internet

Authentication Method: IP Range

Access Method: On/Off campus

Coverage Years: Current + 60 day rolling backfile.

Update Frequency: Daily

Subject/Department: [Empty]

Database Cost History | Statistics Info | General Notes/URLS | Rights Statements

Proxy?

DB URL Notes: [Empty]

License Agreement/Terms of Use URL: ..\..\Committees\License Agreements\Journal License Agreements\proquest_newspaper_0809.pdf

Database URL: <https://libweb.uvwlax.edu/login?url=http://library.pressdisplay.com>

Use Stats URL: <http://library.pressdisplay.com/admin>

Journal List URL: [Empty]

License excerpts (e.g. ILL) can be copied and pasted into ERMes here.

Links to full license agreements can be put here.

Example resource data screen

Database: MarketLine Business Information Center

Vendor Name: Datamonitor

Source: Local

User Limits: Unlimited

Subscription Status: Active

Format: Internet

Authentication Method: IP Range

Access Method: On/Off campus

Coverage Years: [Empty]

Update Frequency: Biannual-company & industry info; Ar

Subject/Department: Business, Marketing

Database Cost History | Statistics Info | General Notes/URLS | Rights Statements

Proxy?

DB URL Notes: [Empty]

License Agreement/Terms of Use URL: [Empty]


Database URL: <https://libweb.uvwlax.edu/login?url=http://www.marketlineinfo.com/library/>

Use Stats URL: [Must request use stats from vendor.](#)

Journal List URL: [N/A](#)

Multiple subjects can be selected for each resource.

Another example of resource data screen

Vendor/Database Problem Form	
	
Vendor	ProQuest/CSA
Database	ABI-Inform Global
Problem_Date:	1/22/2009
Problem:	Incorrect metadata for article
Resolution:	Submitted info to tech support, waiting for content dept. to fix error.

Resource incident tracking form