

**Using the ERM for Managing
Content, Budgeting, and Reporting**

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Today's talk

- ▶ Organizational environment for ERMs
- ▶ Expectations from ERMs
- ▶ Use of ERMs in functional areas of selection, acquisitions, and access
- ▶ Examples of successful initiatives and outcomes

Organizational environment ERMs

- ▶ Responsibility and authority for managing electronic resources is distributed across many different library units.
- ▶ Several library staff are involved in product lifecycle management.
- ▶ Data are collected by several different units.

Expectations from ERMs

- ▶ Collection of data
- ▶ Integration and dissemination of data
- ▶ Analysis and reporting of data

Organizational goal

- ▶ Promote collaborative electronic resource management throughout the library system
- ▶ Facilitate efficient workflow processes
- ▶ Eliminate duplicative effort
- ▶ Reduce duplicative inventory

Low-hanging fruit

- ▶ Vendor/publisher contact information
- ▶ Administrative account details
- ▶ Flag PORTICO and LOCKSS participating titles

Reaching beyond

- ▶ Accurate representation of electronic journals included in journal packages
- ▶ Accurate representation of e-journals inside aggregator databases
- ▶ Display relationships between title, package, platform, and publisher
- ▶ Elimination of repetitive duplicate input
- ▶ Elimination of duplicative inventory

User and public services needs

- ▶ Terms and conditions of use
- ▶ Access permissions, walk-in(s), alumni
- ▶ ILL permissions
- ▶ Course packs
- ▶ E-reserves

Budgeting

- ▶ Usage statistics reports
- ▶ Cost-per-use
- ▶ Subscribed and non-subscribed titles included in journal packages

Reporting

- ▶ Scheduled expiration alerts
- ▶ Perpetual access (or post-cancellation access)
- ▶ Archival rights

Thank you