OhioLINK ERM Task Force Meeting Notes
6/13/2011

<div align="center">**THE JULY 11, 2011 ERM TASK FORCE MEETING IS CANCELLED !!!**</div>

Present: Susan Banoun, Julie Blake, Anita Cook, Emily Hicks, Jeanne Langendorfer, Joe Payne, Kristine
   Szabo

1. Review the May 9, 2011 ERM Forum, including the evaluations submitted from attendees
    - Very positive responses from attendees.
    - The licensing and OLinks presentations were frequently mentioned in the evaluations.
    - Discussed OLinks interest and how to meet it. Suggestion made to develop a wiki. Emily asked
      Joe Payne to work with Jeff Pinkham, U Ashland, who volunteered to work on this. The idea is
      to create a wiki to offer a place to ask/answer questions. Also, to review the OLinks web page,
      update where needed and repost on web page after Thomas Dowling reviews it.
    - Attendees mentioned a large range of topics about which they would be interested to hear
      more.
    - Key functions of attendees jobs included a range of people having responsibilities in circulation,
      e-resources (access, licensing, link resolver, trials, trouble-shooting, etc.), systems (Innovative,
      record loading, etc.), reference and instruction, and technical service (acquisitions, cataloging,
      collection development, serials).
    - Summary of Forum evaluations will be posted on ERM Task Force web page and are appended
      at end of these meeting notes.

2. Discuss / plan future forums and/or training days
    - Interest was expressed in a "show and tell" of MIL records – "OL ERM TF : Innovative ERM
      RECORDS FORUM" scheduled for Mon, Aug 8, 2011
    - Forum will be geared to audience of those libraries having Innovative's ERM module
    - Emily will invite other OhioLINK schools using Innovative's ERM
    - Agenda: Sharing ways ERM is used via screen shots of records, codes and definition
      spreadsheets, future plans
    - Records: resource, licensing, contacts, order, related order and related holdings
    - Possible follow up: Coverage Load, Statistics, other?
    - Tabled additional training day of the scope presented in May
    - Lunch will be handled as usual for OL meetings: call for lunch commitments (at least 6 needed)
    - An email with details will be sent prior to Aug. 8

3. Review the OhioLINK ERM site for current and accurate information
    - Charge was already rewritten; chairs will review and send to Anita for posting.
    - Membership reviewed: Jennifer Bazely, Miami U, to be invited; Kay Downey to be asked of her
      continuing interest; also discussed expectations of membership for this committee (regular
      attendance at meetings, involvement in email discussion, etc.), with everyone to consider their
      ability to be involved and their commitment going forward.
    - ERM Page will be linked from OhioLINK DMS page
    - Meeting notes will be added
    - Frank, Julie and Thomas need to send in PowerPoint presentations from ERM Forum so Anita
      can arrange for them to be linked

4. Review ERM group's charge, particularly in terms of aligning with OhioLINK Strategic Plan and
    including survey results

- Innovative ERM "module" mentioned several times; it was changed to "systems"
- SB: remove 2.0
- Emily and Susan will rework and distribute

5. Draft a report of the group's work to date to distribute to OhioLINK DMS, CIRM, USC, LAC and any other appropriate groups
   - Send as part of DMS semi-annual report to LAC

6. Meetings:
   - Susan suggested the committee meet alternate months starting Sep 12 (Nov 14) to alternate with DMS: this was well supported by members present; query to be posted to listserv.
   - Suggestion made to consider doing no more than one larger forum per year
   - Work on parts of the charge during meetings (system issues and best practices including record structures, codes, specifications, standards and workflows, providing access to users, and staff management of e-resources).

Notes by J. Langendorfer

Appendix follows

OhioLINK Electronic Resources Management Forum 5/9/11 – EVALUATION

25 responses   Recorded by Jeanne Langendorfer

1. **Why did you attend the Forum today?**
   - Learn more about ERM, what steps OhioLINK is taking at consortium level as it impacts decisions at local level.
   - To catch up on other OhioLINK libraries
   - To gain knowledge about using ERM records and to share our experiences in ER
   - To learn how others utilize ERM systems
   - Our institution is looking into purchasing ERM system
   - Get an overview of what other are doing
   - We are hoping to implement an ERMS soon
   - I work with Innovative ERM
   - Learn more about ERMs and how OhioLINK libraries are making use of them.
   - To learn about e-resources at other colleges
   - To learn more about OhioLINK e-resource planning / workflows and how OLinks works
   - Part of my duties are to manage Electronic Resources.
   - Learn more about best practices & other ideas for working in the ERM and displaying information to users
   - Starting to assist the Serials Manager with ERM
   - I work with electronic resources & this seemed very useful
   - Gain more working knowledge of ERM
   - We don't have an ERM system, it comes up frequently, want to learn more about them
   - Because the face of traditional resources are changing, which affects librarians' roles. I am the Serials Supervisor and journals continue to change format (ex. Online-only). We are always looking for better ways to serve our students; as an OPAL member we have recently implemented Serials Solutions.
   - Learn more about ERM use in Ohio + OhioLINK planning on ERM
   - To learn more & to see/connect with others
   - To find out more about how other schools are dealing with the confusion.
   - Interested in what other OhioLINK libraries are doing – particularly grateful for the OLinks walk-through
   - Interesting to hear different uses of the ERM, constantly evolving nice to have more ideas on how to use ERM
   - I'm interested in better management of resource and hopeful that a consorital solution will emerge for ERM
   - To learn more about what ERM can do for my institution

2. **Did today's Forum meet your needs?**
   - YES ||||| ||||| ||||| ||||| ||| = 23
   - Generally
   - Provided questions to ask before purchase, issues to inquire about
   - It was good to hear what and how other institutions are managing e-resources
   - Somewhat – but vast subject when looking at the nits grits so to speak.
   - It was informative, although it would have been better if it had been more hands-on, more examples, discussion sessions

- Partially
- Absolutely
- It was quite informative

3. **Do you want to learn more about the topics presented today?**
- YES ||||| ||||| | = 11
- Most – but a lot can be gained from journal literature
- That would be helpful
- All of them, but especially OLinks
- Very much so
- Eventually; I will need to work on items from today first
- I would love to see more spreadsheets about information/fields includedin ERMs in other libraries & what is displayed to users vs what they want to see
- Specifically it would be great to get directions or templates on how to export the OLinks data from Serials Solutions and EBSCO.
- I'm very interested in some sort of resource sharing tips for submitting to OLinks!
- Julie's presentation on licensing was extremely interesting. Because each vendor/publisher is different, it'd be nice to now each of their expectations.
- I'll wait for Sierra possibilities…
- In the sense of continuing the conversation, absolutely
- Would be nice if all slides were shared. More info on OLinks. OLinks is so involved and data driven. Takes tons of time and would be nice to have more info. (i.e. More info on building links to article level.)
- Absolutely

4. **What other topics would be interested in learning about?**
- Thoughts on what is keeping the majority of users from submitting data for OLinks. 10-15 of 80 schools, like us – is it unknown time commitment and resourced needed for monthly trouble-shooting, communicating, testing, and how this might be overcome by us non-submitters. Plus fear of one (ext????) OhioLINK staff? With set up questions and maintenance.
- Statistics
- More licensing issues
- ERM budgeting
- More ERM workflows
- Discussion of how to handle e-books
- How each library is sharing this info w/ public, how can this infor be shared to reduce "reinventing"
- Databases displayed in Summon
- Hands on training with workflow management w/ different programs
- OhioLINK discovering layer development
- E-Book management systems; trials & evaluation
- Non-proprietory (i.e., non-III) ERM info
- Interacting on negotiation, with publishers in terms of pricing, support, consistency, access
- More research on students' (users) needs, perspectives, etc. – along the lines of Amy Fry's presentation.
- Wiki idea for OLink support is good.
- How to manage eresources without an ERM
- More workflow "how-to's"

- Coverage load, statistics
- Facilitating mobile access
- How to use ERM to manage ebooks

5. **Do you have a greater understanding of electronic resources management after today's Forum?**
   - YES - |||| ||||| ||||| ||||| || = 22
   - NO - || = 2
   - Liked information on customized fields and usability testing for public display
   - Learned some fine points fro licensing that I had not considered
   - Got some ideas from other people
   - In the way other OhioLINK libraries use them.
   - Especially OLinks and a few good tips for licensing
   - Today's forum has been helpful
   - Yes and no. Trying to wrap my head around the electronic end of journals is mind-boggling. I usually get more confused as I learn more about them.
   - Thank you
   - Quite a bit. I work with limited aspects of it but have little direct involvement with other large parts

6. **How will today's session change your work?**
   - Not sure || = 2
   - Impact purchase decisions
   - It gave me some ideas that I'd like to try
   - I will be more aware of licensing issues (possibilities)
   - Possibly expand, modify our licensing records
   - Provided important info to ask about as we consider purchase
   - I can better explain what an ERMS can do for us and I have a better idea of what can be done & what to expect
   - Not by much b/c I don't have much authority to do anything significant but it's helpful to learn more about how things work and hear what others do to start thinking about better ways to do or display things
   - I will look more carefully at licenses, and will investigate how to track e-resource documentation
   - Probably not. We do not have an ERM and cannot afford one.
   - We have been hoping to better track & evaluate licenses, the "Previews Project" from Frank Bove was very interesting. Also, Julie provided a few tips I will look at more closely in licenses.
   - Not sure yet. It stimulated thoughts and ideas, which is always great.
   - Rethink work flow & contributing at article level to OhioLINK.
   - Be more faithful about sending updates to OLinks!
   - Asking more questions & making sure I really understand something before I make a move. I liked Julie's comment about not letting herself be under-estimated.
   - Not much
   - I need to get my library to consider the problem of all the money to electronic, all the people doing paper
   - More emphasis on sharing info!
   - Help me understand license record; last session was amazingly informative
   - I would be happy to be involved with an OLinks user group or wiki: Jeff Pinkham, Ashland U.

7. **What are the key functions of your work responsibilities?**
   - ER – licensing, acquisitions, troubleshooting, management and ref desk
   - E-Resource Mgmt
   - Budget (monos & serials), Serials (purchasing), Licensing (serials – all ERs, and ERM records
   - System admin-Innovative system; circulation supervisor
   - Cataloging, collection development, some systems responsibility
   - Reference, instruction, collection development
   - Electronic services, Reference, Instruction
   - Manage access and maintain records for e-resources
   - Electronic and continuing resources
   - Tech. services management
   - Acquisitions librarian – purchase materials, make sure access to the materials is there
   - Licensing; ordering electronic resources, setting up trials, managing Serials Solutions A-Z list, researching access problems
   - Acquire, catalog, manage finances, troubleshoot, work w/ vendors for e-journals & databases. I am also a library liaison and do reference & coll. dev.
   - Everything serials both print & electronic, cataloging, managing e-resources, binding, claiming, etc.
   - Systems Coordinator – care for III system; Electronic resources – create/maintain bib records for resources, check URLs, troubleshoot access problems
   - Electronic/physical maintenance of journals, library's Facebook page
   - Assoc. Dir – Tech. Serv./ Computer Systems
   - Catalog supervisor, e-resources
   - Gov docs cataloging, implementation leader of new Summon instance, digitization of in-house resources for DRC instance
   - Serials in all formats, all access and troubleshooting
   - OLinks, SS MARC load, .e maintenance (ERM)
   - Reference, administration of ETDs and OLinks file and EZ Proxy table. Business school liaison and library instruction.
   - Reference, instruction, selection/collection management

Other comments:
Well hosted – Thank you!
Thanks for a great day – sessions, location, food!