

## **OhioLINK 2.0 ERM Task Force Meeting**

May 10, 2010

**Present:** Susan Banoun (University of Cincinnati), Emily Hicks (University of Dayton), Kristine Kinzer (Ohio Wesleyan University), Kay Downey (Kent State University), Cherie Bronkar (Muskingum University), Frank Bove (University of Akron), Joe Payne (Ohio State University-Health Sciences), Deberah England (Wright State University), Piper Martin (Wright State University), Jeanne Langendorfer (Bowling Green State University), Anita Cook (OhioLINK), Amy Frye (Bowling Green State University)

### **Introductions**

In addition to name and institution, attendees were asked to answer the following questions:

Does your institution have an ERM? If so, how are you using it? What are your future plans for the system? If not, why? Do you have an inhouse tracking system? What are your expectations of the work of this group?

### **Review the charge**

The idea for this group originated with DMSC. Each school was implementing differently. The OhioLINK 2.0 umbrella came later.

This task force will be charged with the following:

A critical examination of local needs and practices in regards to Electronic Resources Management and its implication to OhioLINK 2.0 is required to ensure a consistent and capable approach for user and staff access across OhioLINK institutions to ERM data. The collaboration and sharing of best practices will enable individual sites to share experiences and develop standards. This task force is charged with the following.

- (1) Explore and document ERM system issues and best practices including record structures, codes and specifications, standards, and workflows.
- (2) Explore and document how the ERM module is used to provide user access to electronic resources.
- (3) Explore and document how the ERM module is used by staff to manage electronic resources.
- (4) Develop functional requirements and processes that will fully integrate ERM records and functions into the design of the OhioLINK 2.0 system.

This preliminary charge is subject to review by the Acquisitions/Serials Functional Requirements Committee and could be changed after review.

Charge was reviewed and accepted. We will keep an eye on the long-term process as we talk about and work at local level.

### **Other Discussion**

#### ERM-specific:

Coverage loads

Statistics (journals only at this point with III and SUSHI; manual with ebooks, databases)

Recurring ticklers--new III enhancement—multiple ticklers 2009B Update (BGSU tested beta)

## General:

Is a consortial ERM our goal?

Managing electronic resources needs to be integrated—involves people and functions from all over the library

Survey questions--our experiences are varied around the table; we want to gather information from around the state

1. Do you have an ERM—broad terms? How do you use it? What would you like to do with it?
2. If not, why not? (price, not needed, other?)
3. Purchasing strategies
4. Coverage load – Y/N
5. Loading usage stats - Y/N

Listserv for community—OhioLINK Eres listserv already exists

Task force web page at OL under 2.0 umbrella

Terminology is confusing—perhaps a glossary, data dictionary—as part of our set of standardized tools for the OL community

Does anyone use ERM for scheduling trials, etc.? Huge piece of collection management; rough cost per use during trials; compare different interfaces

Akron has some data in ERM from own website (open source) Get feedback from community

Bowling Green manages trials in ERM; create record from the start “Trial...”; they have round of trials in Fall, Spring; annual review of databases meeting run by collection development with all collection development & reference librarians

Marketing is a big issue

How does Serials Solutions services, EBSCO A-Z list fit in with, work with ERM systems?

Comparison chart of all ERMs would be helpful

Idea to showcase aspects of ERM systems to other OhioLINK committees such as CIRM, DMS, Users, etc.

Possible other showcase venues:

EGL—IUG—Friday, October 22, 2010  
Akron Summit County Public Library

ALAO—Oct. 29<sup>th</sup> Crown Plaza, Columbus

## ERM Task Force upcoming meetings

Second Monday of each month—next meetings June 14<sup>th</sup>, July 12<sup>th</sup>, Aug 9<sup>th</sup>, Sept. 13<sup>th</sup>

## **Assignments:**

1. Work on survey—Kristine, Frank, Susan, Emily
2. Work on glossary—look at UKSG, NISO-ERM—Kay with Frank; include III terms
3. Contact other committees—Susan, Emily
4. Webpage—Anita, Piper
5. Think about showcases for various groups—ALAO (Deberah), hold on EGL for now—Amy, Piper

6. Jean will send out recent bib and start literature review
7. Standards--Deberah

**Next meeting—June 14, 2010 10:00 A.M. State Library of Ohio**

1. Report progress on each assignment
2. Discuss what to document, existing documentation that we can use, etc.
3. Standards update by Deberah
4. Discuss milestones and timeline

Notes by: E. Hicks