

# Do We Really Need an ERMS?

## Evaluating a Subscription Agent's Resource Management Tool

### Problem:

The HS/HSL has over 24,000 electronic resource subscriptions to support programs in Medicine, Dentistry, Pharmacy, Nursing and Social Work. We need a more effective way to:

- Manage the life-cycle of subscriptions
- Store licensing information for cross-library use
- Create reports that aid in collection development

### Possible Solutions

Home-grown databases and spreadsheets

- What we use now
- Satisfactory but labor intensive

Stand-Alone ERMS

- Follow DLF/ERMI recommendations
- Strong relationships between ERMS vendors/publishers/standards organizations

*But*

- Expensive
- Labor Intensive to populate
- Yet another module to maintain

### SwetsWise eSource Manager

- Provides a databank of standard publisher licenses
- Allows customization of licenses and creation from a template
- Stores digital copies of signed licenses
- Integrates with SwetsWise, making title association to license easy
- Provides licensing information for cross-library use
- Forthcoming add-on module promises integration of usage statistics to generate reports useful for collection development

*But*

- Most useful for journal subscriptions purchased through Swets; databases and package deals have to be entered manually
- SwetsWise interface not intuitive for locating licensing information

### Conclusions:

SwetsWise eResource Manager is a promising product that leverages existing databases and relationships to provide some e-resource management capability. With the forthcoming additional modules and enhancements it could certainly substitute for a stand-alone ERMS at an institution of our size.

### Serial Vendors Solutions

- Established relationship between vendor and library
- Vendors experts in managing serial subscriptions
- Vendors maintain strong relationships with serial publishers

The screenshot displays the 'License Details' page for 'University of Chicago Press-HSHSL'. The interface is organized into several sections:

- General Information:** Includes 'Page Updated 2008-09-08', 'license type: customized', 'access provider: University of Chicago Press', 'registration required: yes, register', 'license status: license sent to publisher, show status', and 'standard license details: view standard license details'. It also lists 'Online Access Links' (Publications Access Site, Site Use Terms & Conditions) and 'Related Links' (All Of This Publisher's Licenses, Subscriptions Under This License).
- Order Conditions:** A table with columns for the condition and its value:
 

Pricing model	number of FTE
Number of concurrent users allowed	unknown
Type of IPs allowed	B,C,D class IP ranges
Number of FTEs allowed	unknown
Number of Sites allowed	unknown
Consortia model supported	no
Upgrade during subscription period	yes
Downgrade during subscription period	no
- Access Policies:** A table with columns for the policy and its value:
 

Access after cancellation	Yes, with an annual fee
Back year access	unknown
Grace period offered	unknown
Publisher's access activation time	
Confirmation of access	yes, to customer
Publisher's authentication method	ip
- License Allowances:** Includes 'Fair use clause: yes', 'Citation requirement details: All copyright and other notices contained in the article must be maintained. See terms and conditions http://www.journals.uchicago.edu/page/license.html', 'Digitally copy: yes', 'Print copy: yes', 'Print copy note: Single printed copies of individual articles may be made for private use or research. An Authorized User may transmit a hard copy of any article to any individual who is not an Authorized User provided such transmission is not for compensation.', and 'Scholarly: yes'.
- Publisher Definitions:** Includes 'FTE definition: different per institution', 'Authorized user definition: Members of institutions or Licensees are limited to research and teaching staff, students, employees, on-site users of the institution or Licensee's library and campus computer network, and any other users agreed to in writing by the Press.', 'Site definition: Not Applicable. Access for all registered IPs.', and 'Tier price definition: There are 8 Tiers which are based on FTE ( Full-time employees or students, depending on the type of institution). 1-999 FTE; 1000-2999 FTE; 3000-9999 FTE; 10,000-19,999 FTE; 20,000-29,999 FTE; 30,000-39,999 FTE; 40,000-49,999 FTE; 50,000 FTE or more.'
- Your Custom Fields:** Includes a 'Comments' section.

