



Electronic Resource Management in Libraries

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Abstract:

E-resources represent an increasingly important component of the collection-building activities of libraries. "Electronic resources" refer to those materials that require computer access, whether through a personal computer, mainframe, or handheld mobile device. They may either be accessed remotely via the Internet or locally. As libraries dramatically increased their numbers of licensed electronic resources in the 1990s, such as online journals and databases, they realized the need for a recordkeeping system that would help manage the details of acquiring and maintaining them. As the idea of locally designed and built electronic resource management systems became more accepted, academic institutions began to seek assistance outside their universities to build their own systems. The author advocates provide one-stop shopping for the full range of journal literature available and of interest to library patrons.

Keywords: *E-resources, E-resources management, Libraries*

1. Introduction

Electronic resource management (ERM) is the practices and software systems used by libraries to keep track of important information about electronic information resources, especially internet-based resources such as electronic journals, databases, and electronic books. The development of ERM became necessary in the early 2000s as it became clear that traditional library catalogs and integrated library systems were not designed to handle metadata for resources as mutable as many online products are. *Electronic Resource Management in Libraries: Research and Practice* provides comprehensive coverage of the issues, methods, theories, and challenges connected with the provision of electronic resources in libraries, with emphasis on strategic planning, operational guidelines, and practices. This paper primarily focuses on management practices of the life-cycle of commercially acquired electronic resources from selection and ordering to cataloging, Web presentation, user support, usage evaluation, and more.

2. History

The idea of developing electronic resource management systems emerged in 2001-2002, growing out of research by Tim Jewell at the Washington. The Digital Library Federation and NISO began work on May 2002 to develop standards for ERM data these standards were published in the 2004 as an *Electronic Resource Management: Report of the DLF ERM Initiative* Since the publication of the report, several vendors of integrated library systems has released ERM products.

3. Features of ERM

- Supporting the acquisition and management of licensed e-resources
- May be integrated into other library system modules or may be a objective system
- May have a public interface, either separate or integrated into the OPAC

- Providing descriptions of resources at the package (database) level and relate package contents (e.g. e-journals) to the package record
- Encoding and perhaps publicly displaying licensed, rights such as e-reserves, course packs, and interlibrary loan
- Tracking electronic resources from point of order through licensing and final access
- Providing information about the data providers, consortia arrangements, access platform
- Providing contact information for all content providers
- Logging problems with resources and providers
- Providing customizable e-mail alerting systems (e.g. Notices to managers when actions are expected or required)
- Linking license documents to resource records
- Supports retrieval of SUSHI usage statistics.

4. Examples of ERM

AMSL: Electronic Resource Management for Heterogeneous Data in Libraries, within the focus of the project is the development of methods and tools for the integration of library data and information from the Internet in the Linked Open Data Cloud. The goal is a scalable and usable, intelligent data management platform, normalize the diverse data from different provinces, networking and high demantified in RDF format and any other representation formats can gather. The focus kept on aligning a system complementary and data interoperability architecture concept, which is operated by system librarians. As part of the project a use case is to be realized, that provides resource management functions to ensure the efficient licensing, budgeting and management of electronic resources to the level of the smallest unit of publication.

- **CORAL:** It is an Electronic Resources Management System consisting of interoperable modules designed around the core components of managing electronic resources. It is made available as a free, open source program.
- **ERAMS: (e-resource access and management services)** are a way of thinking about library management to help libraries optimize the access, usage, data, and workflows of electronic library collections in the physical and digital library.

5. Technical Requirements

E-resources also present a number of technical issues that need to be considered to ensure resources are compatible with existing library hardware and software and that the library has the capability to provide and effectively maintain access to resources on an ongoing and cost effective basis. Evaluation should be in consultation with the appropriate technical staff and should include consideration of the following:

Method of Access – What methods of access are available (e.g., stand-alone, remotely via the Web, local Web mount or hosting)? Access to remote hosts via the Web is often preferable because it provides additional benefits such as faster updating, optimum access, reduced burden in terms of storage, preservation and maintenance.

Authentication – What methods of authentication are available (e.g., IP filtering, login and password)? Access via IP filtering is often preferable because it typically provides simultaneous access for multiple users. IP-address recognition can also provide access to users via a proxy server, allowing authorized library users to access content from outside the physical confines of the library is an important feature. In such circumstances, a commercial database “sees” and recognizes the library IP address, not the user’s home or any other IP addresses, and grants this user access. It should, however, be noted that access via proxy server sometimes is negotiated in the license agreement.

Access via login and password may be less preferred, as it presents a number of challenges around dissemination and control of passwords, particularly when a library serves a large user base. If a vendor insists on password-based access, a disclaimer in the license agreement must be made about the limitations of the library's ability to control the distribution of this password to non-affiliates.

Compatibility – The resource should be compatible across a range of platforms and, where local installation and maintenance are required, should be compatible with existing hardware and software supported by the library. The selector should also determine if the e-resource requires any special hardware, software, multimedia, and/or audio capabilities. Where this is the case, consideration needs to be given to the additional cost of acquiring, installing and supporting the appropriate software or multimedia components. Consultation with staff responsible for reference services may be needed to determine if software or add-on components are required for all or only some of the public PCs before making a selection decision.

6. Licensing Considerations for E-Resources

Unlike print publications, e-resources are not purchased outright and usually require a license agreement to be in place. Prior to purchase, the license must be reviewed and negotiated to inform and support the evaluation process, and to ensure that it reflects the selector's expectation. It is preferable to obtain, where possible, a standard model license agreement that describes the rights of the library in an easy-to-understand and explicit language. In some countries such the United States, new approaches (e.g., SERU – A Shared, E-resource Understanding, which relies on existing U.S. copyright Law and a mutual agreement between resource provider and library to operate within a framework of shared understanding and good faith) are emerging as an alternative to a license agreement.

7. One-Stop Shopping: Why

7.1 What is one-stop shopping?

The concept of one-stop shopping as used in this chapter refers to a single place for users to look to determine whether or not they have access to a desired article. It does not necessarily mean that all accessible journal holdings are in a single database. Rather, it means that a patron can start looking at a single place and be led seamlessly to all available holdings. After several years of putting electronic holdings in separate Web lists, more and more librarians are recognizing the need for unified access to all serial holdings, regardless of format (paper, electronic) or source (aggregated database, individual subscription, etc.). As Jones writes, "Libraries need a gateway. Or, perhaps more accurately, library users need that gateway, that one entry point into the increasing wealth of information in an e-series (and all things "e") which their library can provide for them. They should not have to fritter away their time trying to figure out which catalog/Web site/listing to consult" McCracken emphasizes the importance of including electronic journals from aggregated databases in the library catalog, even though the content is leased rather than owned and changes rapidly. He argues, "What about the customers who lose out if they do not know that a journal is available in a specific database? How many patrons go away empty-handed, when the library is actually already paying for access to the journal? Money—and the patron's time—is regularly wasted in interlibrary loan requests for journals the library does not know it can access electronically"

7.2 One-Stop Shopping: What and How

One-stop shopping represents a return to the model libraries have used for decades—library holdings represented in one place (for the most part). But as one looks at the current state of journal literature, one must ask, "What is a library holding?" To which materials should libraries attempt to direct users, and which materials are outside the library's responsibility? To some degree, the answers to these questions will be different for each library, just as collecting scope is different for each library. Then, once one has decided what should be included in the collection, one must figure out how to provide

access to those materials, taking into account issues related to bibliographic control, workload, and more. This section will examine the universe of journal literature in detail, discussing both the philosophical and practical issues related to including various categories of journal literature in library collections.

7.3 Articles: Free and Pay-Per-Download

The outermost two categories of material, free articles and articles available for a fee, present significant challenges for libraries, because the unit to be controlled is not the journal but the article. Free articles are distinguished from free, journals in that with free articles, one cannot assume that a whole journal, or even a whole issue, is freely available. Free articles are becoming more and more common. Some publishers allow authors to pay a fee to allow an article to be available free to all users, while other publishers allow authors to deposit copies of their work in institutional or other repositories such as PubMed Central. Individual articles are also often available for paid download from journal Web sites or document delivery services. In some cases, libraries are granted a set number of free downloads from a certain publisher as part of a package purchase. All of these possibilities present useful options for library users. The article a user wants may be available free of charge, but the user (or the library) may pay for an interlibrary loan, because the library lacks systems that can easily locate these free articles.

8. Use of the Electronic Information Resource

The license should permit fair use (fair dealing, etc.) of all information for educational, instructional non-commercial and research purposes. The following considerations regarding fair use, user statistics and liability for unauthorized use should be addressed in any licensing agreement which a library, its governing institution, or its consortium signs

Interlibrary loan (ILL) - Interlibrary loan should always be permitted. At a minimum, FAX or postal dispatch of photocopies of printed electronic articles should be allowed. Use of secure ILL, document transmission systems, such as Ariel or other similar protocols, for lending to other libraries should be allowed.

Pay-per-view – Service to access articles which are not available in the library's print or online collections. It should be possible for the library to purchase the article and send it to the patron via email. Pay-per-view is not a replacement for ILL.

Viewing, downloading and printing - Authorized users should be allowed to view and print copies and to download electronic copies of single articles from the e-resource for private use, in line with "fair use" (fair dealing, etc.) provision in the applicable governing copyright law.

Course packages - Use of the information content from the e-resource should be permitted in course packs and other material of an educational nature, as compiled for a restricted set of authorized users.

Course reserves - Electronic copies of articles or a discrete portion of the information content from the e-resource should be permitted to be included in a library's course reserves (print or digital), as requested by an instructor for a restricted set of authorized users in conjunction with specific courses.

User statistics - The information provider should provide statistics for each library's use directly to the library participating individually or as a member of a consortium. In the case of a consortium, aggregated statistics for the consortium should be delivered to the consortium's administrative.

Liability for unauthorized use – The license should reflect realistic expectations regarding the library's ability to monitor and trace unauthorized use.

Privacy and Confidentiality of User information – The license should ensure the privacy and confidentiality of the users' information when accessing the e-resource, including information that is collected from users to create a personal account on the resource.

9. Conclusion

The world of journal literature has changed dramatically in the last decade and continues to change rapidly. To respond to these changes effectively, libraries should focus on the needs of users and find ways to make journal literature more easily accessible. A key component in that vision is providing one-stop shopping for as many relevant journals as possible, both via the library catalog and at the point of need via a link resolver. Currently, libraries can provide one-stop shopping for print and electronic journals, including titles from aggregated databases, as well as some free titles. But this vision often must be compromised as libraries weigh the benefits to users against staff time and resources required to deliver all relevant journal information to their users. Meanwhile, providing access to individual articles, whether free or available for paid download, remains the most challenging aspects of the one-stop-shopping ordeal. So, libraries cannot provide complete one-stop shopping for all journal literature of interest to their users. But they can provide simplified access to some of it and work with vendors and standards organizations to facilitate access to the rest. Library users deserve nothing less.

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