Recommendation Report: Electronic Resources Management system (ERMS)

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Background:

The management of electronic resources is very dynamic and fluid. Electronic resources comprise of materials such as electronic journals, electronic books, databases, images, digital / audio files, videos and many other contents in electronic format. As technology changes rapidly, there is a growing need to ensure that libraries are able to keep abreast of acquiring, implementing and maintaining such electronic resources.

Like many other academic and higher tertiary institution libraries, KAUST library, which is a digitally-born library, has an important task to ensure that all our subscribed plus locally created digital and electronic resources are 'captured' and highlighted to our community. In this sense, our library need to have a proper ERM system, procedures and policies to organize and maintain these electronic resources.

Initial Findings:

We assessed the current Millennium ERM system module and discovered that it was not robust enough to support our current electronic resources management lifecycle. We need a system that could support that various stages of ERM namely:

- Trial and Evaluation of Electronic Resources
- Acquisitions, Business Negotiations and Licensing
- Technical Implementation
- Logistics: Admin information, Troubleshooting, Renewals, Cancellations
- Maintenance

Despite using Millennium ERM, information pertaining to electronic resources are still kept in different storage medium / devices namely MS Sharepoint, MS Excel files, MS Outlook. In addition to that, the current system does not have a proper 'tracking' system. Communication are mostly done via MS Outlook. Email communications tend to get missed by library staff and searching for important emails can be tedious at times. Thus, monitoring the electronic resources task from beginning to the end of the lifecycle can be challenging. There is a growing need to keep all these information in a centralized system.

Methodology:

- Conducting Literature Reviews
- Contacting peer libraries

ERM Wishlist:

From the literature reviews, several 'wishlist' for the new ERM system were created. It should be able to update and store important information and perform tasks such as:

- License Information
- Acquisition Information
- Access Information
- Historical data
- Report Generation
- Essential notes for library staff as well as for the public users
- Alert trigger
- Profile Granularity

Contacting Peer Libraries:

A number of libraries from around the Gulf, North America, Europe, Asia and Oceania region were contacted. From the responses that were obtained, it can be deduced that there was a mixture of ERM systems being deployed by them. There was no one shoe fits all solution.

ERM systems evaluated:

- Using the status quo: mixture of MS Outlook, MS Sharepoint, MS Excel. Communication mode: Outlook
- Proquest 360 Resource Manager
- Ex Libris Alma
- CORAL: Open source system

Feedback from Team Members:

Unanimous decision on moving to **Proquest 360 Resource Manager**. Team members were agreeable to move away to a new platform.

Recommendation

From the various demos by Proquest and Ex Libris plus trying out a live demo for CORAL, I, as the Project Lead, would recommend the library to acquire **Proquest 360 Resource Manager.**

Reasons:

- Assimilate with our other existing Proquest products: 360 Core, 360 AZ management system. Thus, it will not present a steep learning curve for our library staff.
- Cost Price: USD X,XXX plus one time implementation fee (1,200 FTE). We paid Millennium (all modules) $ XX,XXX.00. Systems Specialist was not able to provide team lead with the exact module costing for Millennium ERM.
- Stores all the important information in a centralized place
- Alert mechanism feature to remind library staff
- Tracking / Monitoring feature

Long run:

We should keep learning and trying out the open access CORAL system. This could be another viable alternative solution for ERM system.