

Serials Solutions 360 Resource Manager

Dani Roach

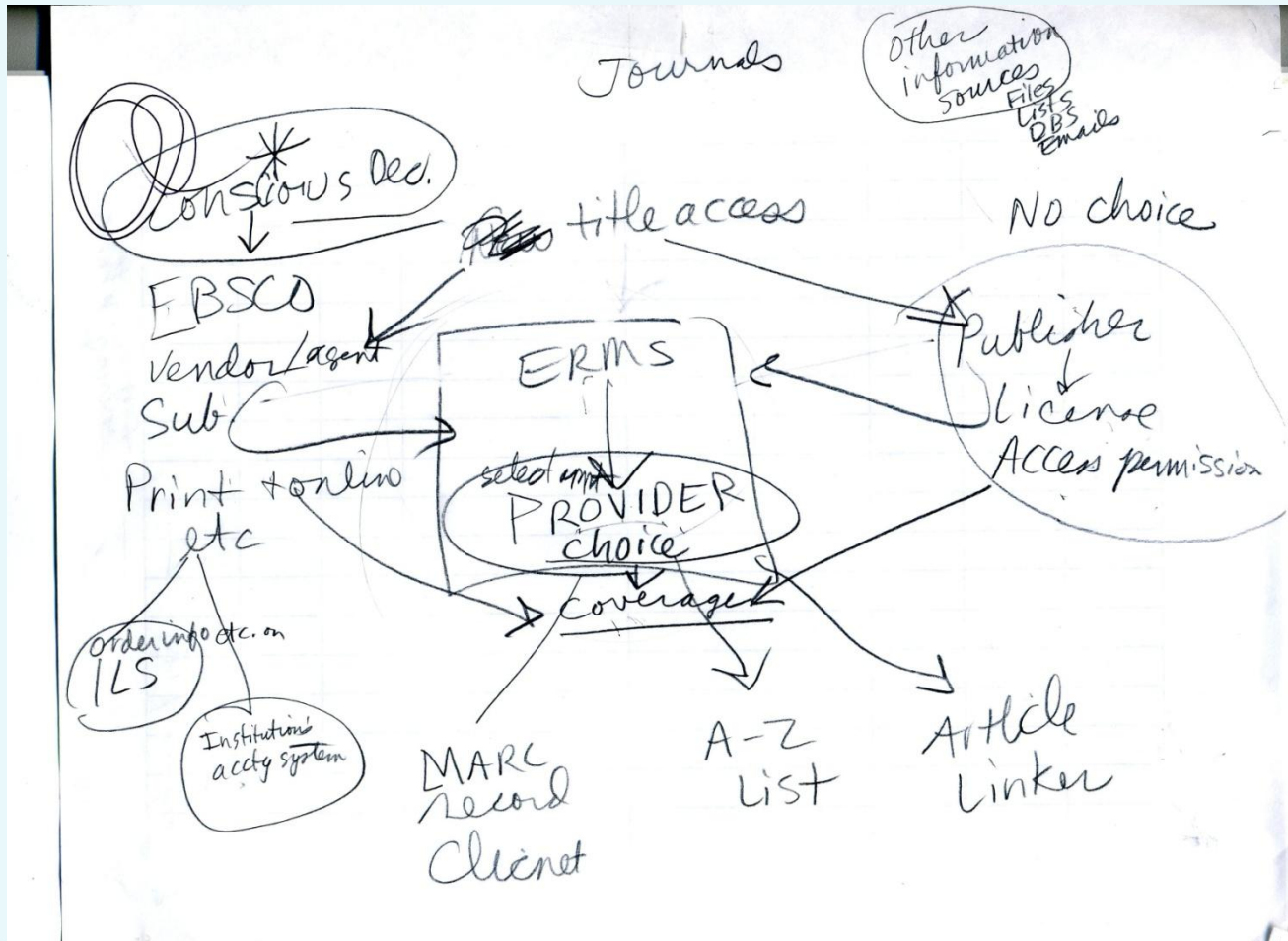
Carolyn DeLuca

University of St. Thomas Libraries

3/19/2009

2009 Library Technology Conference, ERM Panel

What are we managing?



How are we managing it?



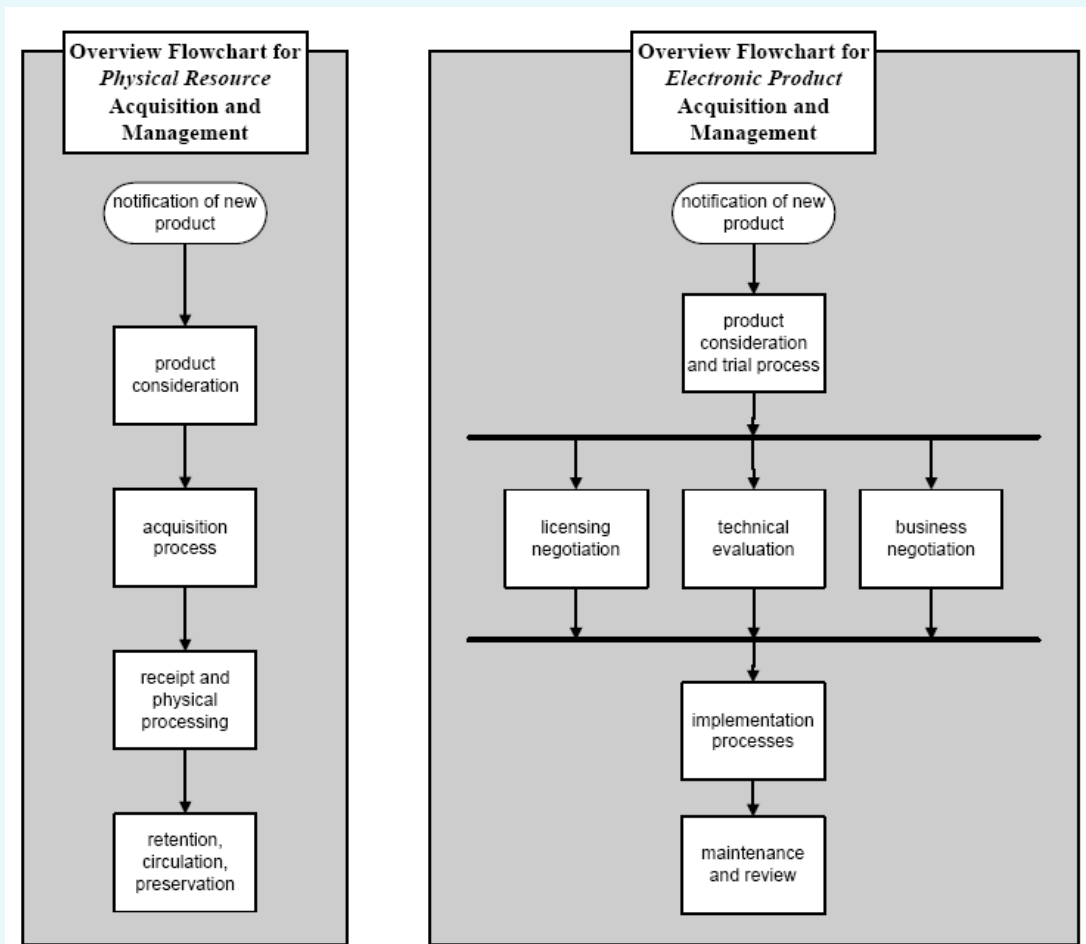
E-Resource Management

- Complex but not difficult
- Requires flexibility of the system/s and the people using it
- Must allow for constant decision making (and revisions)
- Must accommodate all e-resources purchase models

ERMS MYTH: You can manage all this stuff in one place.



WANTED: New acquisition model to manage new format/s



Why an ERMS?

- Manage complexity that comes with online format
- Centralize related e-resource information
- Vendor of the ERMS maintains knowledgebase
- Connection with vendor's additional services (Open URL linking, federated search, etc.)
- Accommodates both front end and back end

UST before ERMS

ERDB

III

Single e-journals

Public folders

Emails

Licenses

History/institutional memory

Paper Files

Contact info

University accounting system

Vendor use stats

Subscription details (comes with)

Subscription vendor/entitlement
information Ebsconet)



UST after 360 Resource Manager

ERMS

- A-Z
- OpenURL
- Federated Search
- MARC for ejournals

III

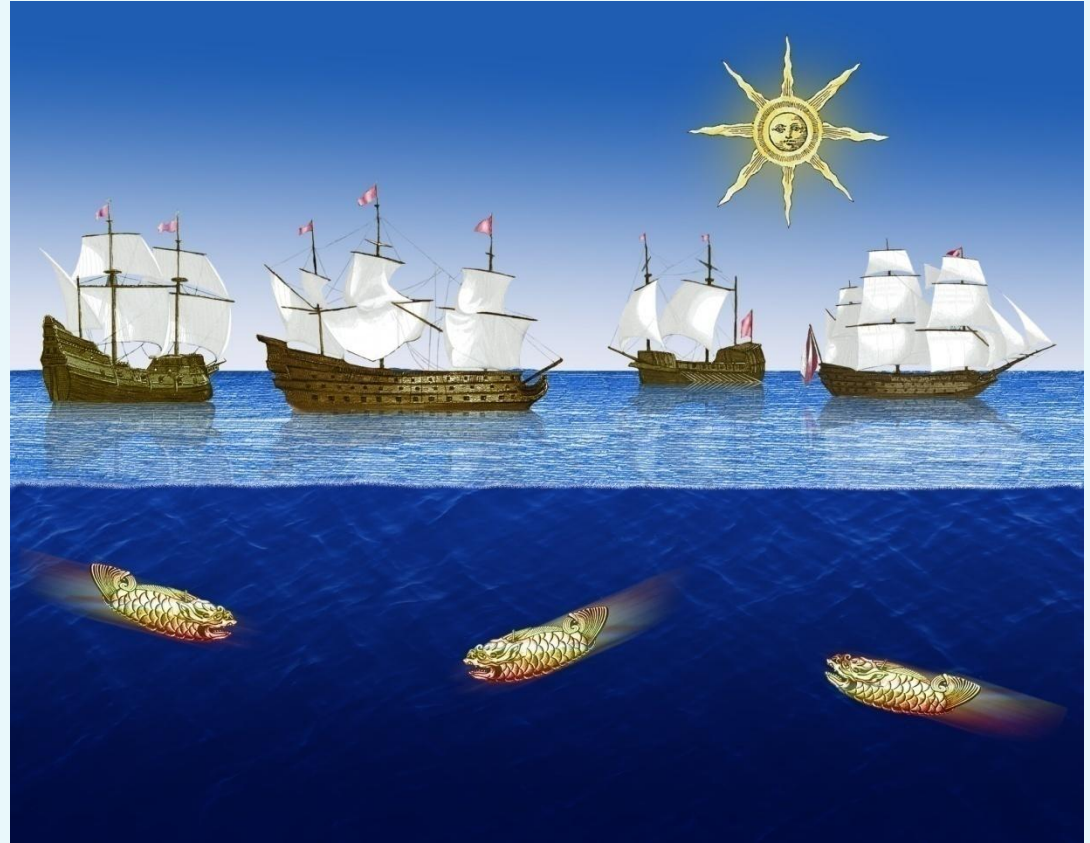
- Holdings
- Vendor info
- Cost data

DB Tool

- Centralized output to website
- Liaison info for/about

Serials DB

- Publisher/platform
- Liaison info for/about
- Renewal info
- Evaluation forms



University accounting system

Subscription vendor info (EBSCOnet)

Paper files

Why Serials Solutions?

- Subscribed to their A – Z product
- Staff had experience with SFX & SerSol
- Didn't want two systems – built on what we had
- Market availability
- Ease of use
- Company focus, reputation, pricing, service, etc.

SerSol grew to include...

- A-Z (August 2001)
- Added local print holdings (Decision Jan. 2003 – finally live April 2004)
- OpenURL resolver (November 2004; Updated April 2007)
- ERMS (November 2005)
- MARC – consortially (April 2006)
- Federated Search (January 2007, live Sept 2007, updated August 2008)
- Counter statistical tool (May 2008)

e-Catalog: All Titles Title Begins With

Home

Home

News More...

- Serials Solutions KnowledgeWorks Update (1/5/2009)
Serials Solutions 360 Resource Manager Consortium Edition Released (12/22/2008)
Serials Solutions KnowledgeWorks Update (12/15/2008)

Webinars More...

- Overview webinar: AquaBrowser Library (3/9/2009)
Subscriber webinar: 360 Core Town Hall - March (3/18/2009)

In Person More...

- SCELC Vendor Day (3/9/2009)
ACRL 14th National Conference #718 (3/12/2009)

Products

- 360 Link
360 Search
360 MARC Updates
360 Resource Manager
360 Counter
360 Core
360 Consortium Edition



Manage Your Data

Data Summary

Table with 2 columns: Data Summary (Total Holdings 95510, Books 10809, Journals 84701, Other 0, Total Databases 283) and Total Unique Titles 50694 (Books 6319, Journals 44375, Other 0). Includes link for Data Management Home.

Advanced 360 Resource Manager Tools

Table with 2 columns: Collections, Menus, Alerts, Contacts, Licenses, Notes, Cost Data Upload, Reports.

Assessment Tools

Table with 2 columns: Usage Statistics, Overlap Analysis, Vendor Statistics Metadata, Counter.

Manage Your Products

360 Core

Table with 2 columns: View E-Journal Portal, E-Journal Portal Customizer, OCLC eSerials Holdings Service, Data On Demand.

360 Link

Table with 2 columns: Advanced Features, Google Scholar.

Manage Your Library

Table with 2 columns: Accounts, Settings, View Changes.

e-Catalog: All Titles Title Begins With

Home > Data Management > Database Details

Annual Reviews :: Annual Reviews Complete A-Z List

Edit

- Database Details
 - General
 - Titles (20 of 45)
 - Books (0)
 - Journals (45)
 - Other (0)
 - 360 Resource Manager
 - Administration
 - Contacts
 - Cost
 - General
 - 2007 (USD 0)
 - Details
 - Itemized (USD 2487.6)
 - 2008 (USD 694.8)
 - Details
 - Itemized (USD 3324.6)
 - Licensing
 - Notes
 - Statistics

Collection

Provider Annual Reviews

Titles 20 of 45

Add All Titles Add All Titles

Remove All Titles Remove All Titles

Status Subscribed

Display In

- 360 Core
- 360 Link
- 360 Search
- MARC-Group

eBook collections are now available in KnowledgeWorks. Please contact us at 360@serialsolutions.com to learn more about pricing details and how eBooks are integrated into your current service.

Default URL http://www.annualreviews.org/ Default URL Link

Custom URL

Use database-level (custom or default) URL only for all titles in this database

Library Proxy Omit proxy from this database

Title Coverage We subscribe to only some of the titles in this database

Default Database Name Annual Reviews Complete A-Z List

Custom Database Name

Database Description

Long Database Description

Custom Coverage Date From

Custom Coverage Date To

Public Database Note Turn on the specific titles and holdings in this Complete A - Z list. The other Annual Reviews entry is for the Central Search connection only.

e-Catalog:

Home > Data Management

Library Databases				Create New Database		Edit Status	
Database	Origin	Status		Provider	Collection		
AA TRIALS	O'Shaughnessy-Frey Library	Trial	20	Library Specific Holdings			
ABI/INFORM Trade & Industry	O'Shaughnessy-Frey Library	Subscribed	1165	ProQuest			
Academic Search Premier	O'Shaughnessy-Frey Library	Suppressed	4750	EBSCOhost	ELM RESOURCES via MINITEX		
Accessible Archives Complete	O'Shaughnessy-Frey Library	Subscribed	4 of 21	Accessible Archives			
ACM Digital Library	O'Shaughnessy-Frey Library	Subscribed	474	ACM Digital Library			
AERA SIG Communication of Research	O'Shaughnessy-Frey Library	Subscribed	11 of 245	AERA SIG			
African American Studies Center	O'Shaughnessy-Frey Library	Subscribed	0	Oxford University Press			
AGRICOLA	O'Shaughnessy-Frey Library	Subscribed	0	OCLC			
Alternative Press Index	O'Shaughnessy-Frey Library	Subscribed	0	OCLC			
America: History & Life (EBSCO)	O'Shaughnessy-Frey Library	Subscribed	0	EBSCOhost			
America: History and Life	O'Shaughnessy-Frey Library	Cancelled	0	ABC-CLIO			
American Accounting Association Publications (Scitation)	O'Shaughnessy-Frey Library	Subscribed	16	American Accounting Association			
American Association on Intellectual and Developmental Disabilities	O'Shaughnessy-Frey Library	Subscribed	4	American Association on Intellectual and Developmental Disabilities			
American Chemical Society Legacy Archives	O'Shaughnessy-Frey Library	Subscribed	36	American Chemical Society			
American Chemical Society Web Editions	O'Shaughnessy-Frey Library	Subscribed	41	American Chemical Society			
American Firms Operating in Foreign Countries Online	O'Shaughnessy-Frey Library	Subscribed	0	Uniworld Business Publications, Inc			
American Geophysical Union	O'Shaughnessy-Frey Library	Subscribed	3 of 24	American Geophysical Union			
American Library Association	O'Shaughnessy-Frey Library	Subscribed	2 of 40	American Library Association			

Customized MENU terms for locally-defined status.

Collections

Name			Description
AIML RESOURCE			Databases and titles supported by Ireland Library funds.
COST SHARED--OSF & LAW			Resources that are split between Law and OSF.
ELM RESOURCES via MINITEX			Those resources provided via ELM contract as of 5/08
LAW RESOURCE			Databases and titles supported entirely by Law funds.

ELM RESOURCES via MINITEX

[Attach](#) [Remove](#)

Collection Details

- General
- Resources (17)
- 360 Resource Manager
 - Administration
 - Contacts
 - Cost
 - General
 - Licensing
 - Notes

Name	Resource Type	Source
Academic Search Premier	Database	EBSCOhost
Business Source Premier	Database	EBSCOhost
DIScovering Collection	Database	Gale
Educator's Reference Complete	Database	Gale
Expanded Academic ASAP	Database	Gale
General Science Collection	Database	Gale
Informe Revistas en Espanol	Database	Gale
InfoTrac Student Edition	Database	Gale
Junior Edition - K12	Database	Gale
Junior Reference Collection	Database	Gale
Kids InfoBits	Database	Gale
MasterFILE Premier	Database	EBSCOhost
MegaFILE	Database	EBSCOhost
Professional Collection	Database	Gale
ProQuest Newsstand (Complete)	Database	ProQuest
Regional Business News	Database	EBSCOhost
Student Resource Center Gold	Database	Gale

e-Catalog:

All Titles

Title Begins With



[Home](#) > [Contacts](#) > [Contact Details](#)

Monique Ortiz

Contact Details

General Info

Resources (1)

Last Name Ortiz

First Name Monique

Email Address MOrtiz@annualreviews.org

Phone Number 650-843-6631

Fax Number 650-424-0910

Title Senior Sales Associate

Organization Name Annual Reviews

Address Line 1 4139 El Camino Way

Address Line 2

City Palo Alto

State/Province/Country California (United States)

Postal Code 94303-0139

Contact Types Publisher

Contact Roles Billing, Support, Licensing, Pricing/Sales

Creation Date 2/5/2008

Note

e-Catalog: All Titles Title Begins With [input type="text"] [button]


Home > Licenses > License Details

Project Muse

Edit

- License Details
 - General Info
 - Resources (1)
 - Terms
 - Values
 - Display In Settings

Authorized Users	All UST, incl. remotely, Walk-ins permitted, Alumni
Authorized Users Note	Access to alumni permitted as long as internal access is through the campus network or via a secure proxy.
Concurrent Users	999
Concurrent Users Note	Unlimited
Fair Use Clause Indicator	Present
Database Protection Override Clause Indicator	Absent
All Rights Reserved Indicator	
Citation Requirement Detail	
Digitally Copy	Permitted (Explicit)
Digitally Copy Note	Download and print one copy of each article for personal use and archive contents on their own personal computers.
Print Copy	Permitted (Explicit)
Print Copy Note	Download and print one copy of each article for personal use and archive contents on their own personal computers.
Scholarly Sharing	Prohibited (Explicit)
Scholarly Sharing Note	Clause c.1. Only via ILL permissions.
Distance Learning	Permitted (Explicit)
Distance Learning Note	
ILL Print or Fax	Permitted (Explicit)
ILL Secure Electronic	Permitted (Interpreted)
ILL Electronic (email)	Permitted (Explicit)
ILL Record Keeping	<input type="checkbox"/>
ILL Record Keeping Note	
Course Reserve	Permitted (Explicit)
Course Reserve Note	
Electronic Link	Permitted (Explicit)
Electronic Link Note	
Course Pack Print	Silent (Uninterpreted)
Course Pack Electronic	Permitted (Interpreted)
Course Pack Note	B. Clause 4

e-Catalog: All Titles Title Begins With [Home](#) > [Reports](#)**Reports**Select Report: License Terms - ILL [Queued Reports](#)1 of 1 

License Terms - InterLibrary Loan

License Name	Resources	ILL Print or Fax	ILL Secure Electronic	ILL Electronic email	ILL Record Keeping	ILL Record Keeping Note
ACM Digital Library	ACM Digital Library (Database)	Permitted (Explicit)	Permitted (Explicit)	Permitted (Explicit)		No restriction on ILL.
American Statistical Association	American Statistical Association Publications (Database)	Permitted (Explicit)	Permitted (Explicit)	Permitted (Interpreted)		
Ammons Scientific	Ammons Scientific Publications (Database)	Permitted (Explicit)	Permitted (Interpreted)	Permitted (Interpreted)		Clause 1.b) Interlibrary loans are permitted, and to be provided via paper, fax, or digital transmission, a facsimile image (e.g., a PDF file) that is an exact

[Home](#) > **Reports**

Reports

Select Report:

Contacts

Get Report

[Queued Reports](#)

- Contacts
- Cost Action
- Cost Report - Details
- Cost Report - General
- License Action
- License Data - General Details
- License Terms - Authorized Users
- License Terms - ILL
- License Terms - Material Usage
- Notes and Comments
- Proxy Configuration
- Resource Administrative Information
- Vendor Statistics

Notes

Add

Note Title	Origin	Date Added	Coverage	Resource	Type	Status
ATLAS Alumni access	O'Shaughnessy-Frey Library	✘ 12/22/2005 8:16:06 AM	Database	ATLA Religion Database with ATLASerials	Licensing	
Britannica statistics definitions	O'Shaughnessy-Frey Library	✘ 2/18/2008 11:27:27 AM	Database	Britannica Online Academic Edition		
Chronicle of Higher Education	O'Shaughnessy-Frey Library	✘ 12/4/2008 2:51:29 PM	Database	Chronicle of Higher Education	General	
ELM Resources Collection	O'Shaughnessy-Frey Library	✘ 5/13/2008 6:42:02 AM	Collection	ELM RESOURCES via MINITEX	General	
Gartner & UST support	O'Shaughnessy-Frey Library	✘ 10/2/2007 8:11:37 AM			Support	
Historical papers subscription	O'Shaughnessy-Frey Library	✘ 11/13/2006 1:53:00 PM	Multiple(3)	Historical New York Times and more...		
IMB & Article Linker/ILLiad	O'Shaughnessy-Frey Library	✘ 12/28/2005 7:08:24 AM	Database	International Medieval Bibliography		
Initial set-up info from vendor	O'Shaughnessy-Frey Library	✘ 8/15/2005 12:47:04 PM	Multiple(2)	ACM Digital Library and more...	Acquisition	
Investexts Plus and Select	O'Shaughnessy-Frey Library	✘ 11/11/2008 2:36:26 PM				
JAMA username/password	O'Shaughnessy-Frey Library	✘ 6/20/2007 1:05:23 PM	Journal	JAMA: the journal of the american medical association		
Lost access	O'Shaughnessy-Frey Library	✘ 12/28/2006 9:41:42 AM			Support	
Making GVRL PURLs	O'Shaughnessy-Frey Library	✘ 10/4/2006 1:00:07 PM	Multiple(2)	Gale Virtual Reference Library and more...	Support	
Mediamark access off-campus	O'Shaughnessy-Frey Library	✘ 7/10/2006 3:14:01 PM	Multiple(2)	Mediamark Research Inc and more...	Incident	Closed
MediaMark forgotten passwords	O'Shaughnessy-Frey Library	✘ 11/3/2008 9:09:28 AM	Database	MediaMark MRI+		
Mergent Online components as of 7/07	O'Shaughnessy-Frey Library	✘ 7/5/2007 9:25:35 AM	Database	Mergent Online	General	Closed
Mergent stats definition	O'Shaughnessy-Frey Library	✘ 11/29/2005 7:33:53 AM	Database	Mergent Online		
Pastoral life	O'Shaughnessy-Frey Library	✘ 12/8/2008 1:12:59 PM	Database	print at UST Ireland Library		
Remote Access Problems	O'Shaughnessy-Frey Library	✘ 9/25/2006 9:49:17 AM	Database	ReferenceUSA Directory	Incident	Closed
RIA Checkpoint	O'Shaughnessy-Frey Library	✘ 12/3/2008 11:30:19 AM	Database	RIA Checkpoint		
SciFinder Scholar software info	O'Shaughnessy-Frey Library	✘ 1/28/2008 7:24:05 AM	Database	SciFinder Scholar	Support	
Tech support	O'Shaughnessy-Frey Library	✘ 11/28/2005 1:11:23 PM	Provider	LexisNexis	Support	
Wiley stats note	O'Shaughnessy-Frey Library	✘ 3/12/2008 9:09:27 AM	Database	Wiley InterScience Journals		

e-Catalog: All Titles Title Begins With

Home > Data Management > Database Details

Annual Reviews :: Annual Reviews Complete A-Z List

- Database Details
 - General
 - Titles (20 of 45)
 - Books (0)
 - Journals (45)
 - Other (0)
 - 360 Resource Manager
 - Administration
 - Contacts
 - Cost
 - General
 - 2007 (USD 0)
 - Details
 - Itemized (USD 2487.6)
 - 2008 (USD 694.8)
 - Details
 - Itemized (USD 3324.6)
 - Licensing
 - Notes
 - Statistics

VENDOR STATISTICS METADATA linked at the resource level

Data Set Name Annual Reviews

- Standards Compliance**
- Project Counter 1.0
 - Project Counter 2.0
 - ICOLC (1998)
 - ICOLC (2001)

- Delivery Method**
- Online
 - Email
 - Paper

- Format**
- HTML
 - Delimited
 - Excel
 - PDF
 - Other

Frequency

AccessUrl http://arjournals.annualreviews.org/action/institutionUsageReport

Access URL Link

Login

Password

Default Recipient Account

Custom Recipient Account Mary Lou Schmidt (m9schmidt@stthomas.edu)

Default Alternate Delivery Email

Custom Alternate Delivery Email

Local Archive Location

Note Click on red tab for Institutional administrator, then on Usage Data tab.

Annual Reviews :: Annual Reviews Complete A-Z List

Itemized costs appear via a III extract and a COST DATA UPLOAD into ERMS

Database Details	Title	ISSN/ISBN	Type	Cost
General	Annual review of biochemistry	0066-4154	Journal	USD 202.5
Titles (21 of 45)	Annual review of cell and developmental biology	1081-0706	Journal	USD 202.5
Books (0)	Annual Review of Clinical Psychology	1548-5943	Journal	USD 170.1
Journals	Annual Review of Earth and Planetary Sciences	0084-6597	Journal	USD 202.5
Other (0)	ecology, evolution, and systematics	1543-592X	Journal	USD 184.5
360 Resources	entomology	0066-4170	Journal	USD 184.5
Administration	Environment and Resources	1543-5938	Journal	USD 170.1
Contacts	Annual review of genetics	0066-4197	Journal	USD 184.5
Cost	Annual review of medicine	0066-4219	Journal	USD 184.5
General	Annual review of microbiology	0066-4227	Journal	USD 184.5
2007 (USD 0)	Annual review of neuroscience	0147-006X	Journal	USD 184.5
Details	Annual review of physical chemistry	0066-426X	Journal	USD 184.5
Itemized (USD 2487.6)	Annual review of physiology	0066-4278	Journal	USD 202.5
2008 (USD 694.8)	Annual Review of Plant Biology	1543-5008	Journal	USD 202.5
Details	Annual Review of Political Science	1094-2939	Journal	USD 170.1
Itemized (USD 3324.6)	Annual review of psychology	0066-4308	Journal	USD 170.1
Licensing	Annual review of public health	0163-7525	Journal	USD 170.1
Notes	Annual review of sociology	0360-0572	Journal	USD 170.1
Statistics				

Total for itemized titles is calculated by Serials Solutions

USD 202.5
USD 202.5
USD 170.1
USD 202.5
USD 184.5
USD 184.5
USD 170.1
USD 184.5
USD 184.5
USD 184.5
USD 184.5
USD 202.5
USD 202.5
USD 170.1
USD 170.1
USD 170.1
USD 170.1

e-Catalog: All Titles Title Begins With

Variety of reports to choose from, with plenty of filters

Home > 360 Counter

360 Counter

Summary View Upload Consolidated Reports

Sort By Vendor Vendor All Vendors Created from: to: Go

Table with columns: Status, Vendor, Report, Date Created, Time Uploaded (PST). Rows include ACM Digital Library, American Accounting Association, American Chemical Society, American Physical Society, Annual Reviews, Blackwell Publishing, Cambridge University Press, Congressional Quarterly Inc., and Credo Reference.

Sampling of reports loaded thus far

Maintenance/management

- 2 primary managers: frontend/backend
- Other staff assist with maintaining holdings, statistics, cost downloading/uploading, counter management
- 13 accounts total (various levels of access)
- Project teams to redesign OpenURL resolver and to select resources for federated search



What to consider when purchasing an ERMS

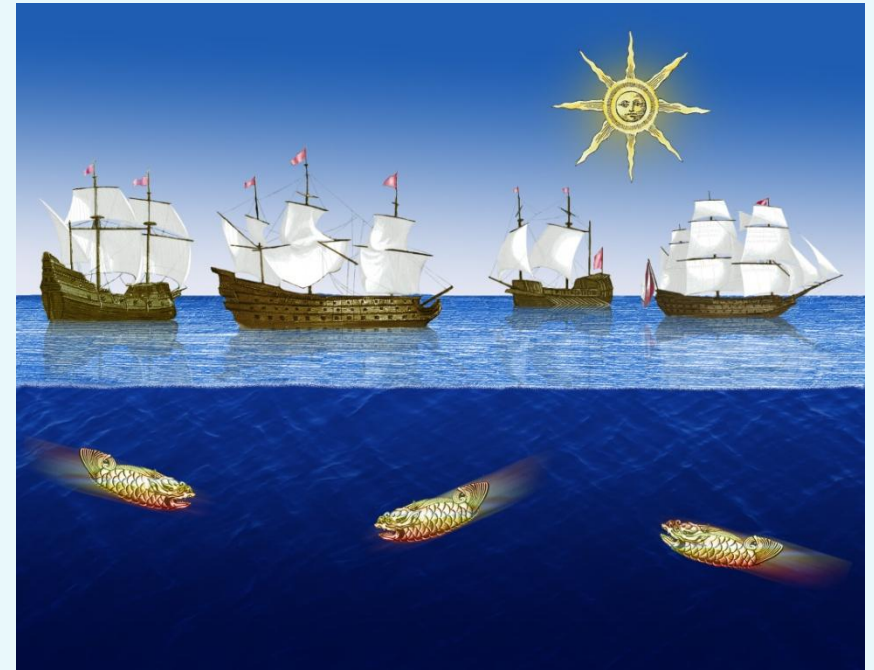
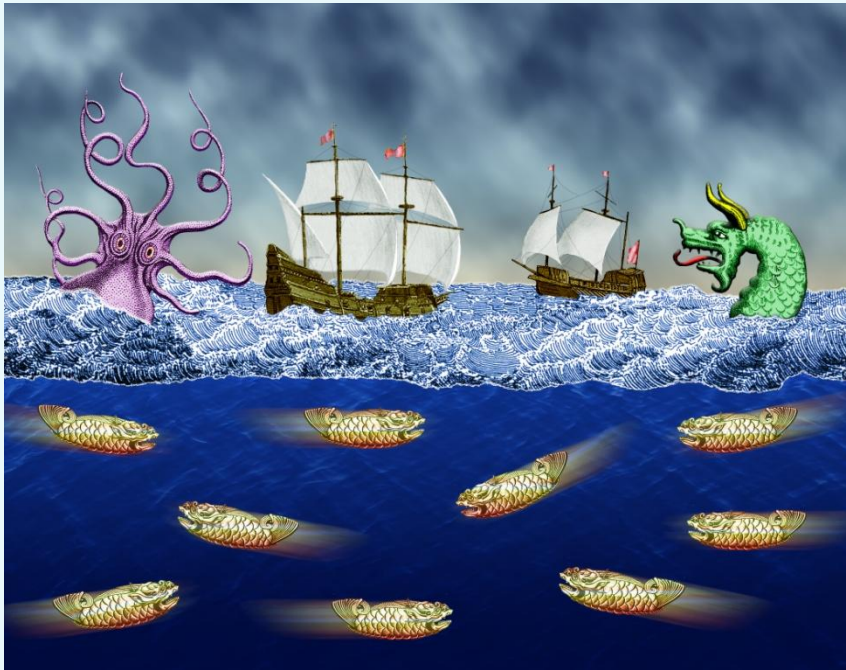
- Your current systems
- Not easily migratable
- Expandable/modular
- Speed of development
- Customer service
- Cost



Tips for implementing/managing ERMS

- Be flexible
- Be willing to change mind/direction/decision/MO
- Look at what others are doing with their ERMS
- Take advantage of vendor offers of support
- Know its limitations
- Keep it simple





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Carolyn DeLuca

cjdeluca@stthomas.edu

Ships ahoy thanks to Roxann Reisdorf!

Electronic Resource Management

Report of the DLF ERM Initiative

<http://www.diglib.org/pubs/dlf102/dlf102.htm>