

Summary Report of Electronic Resource Management Survey

Collaborative Technical Services Team: Serials/Electronic Resource Management Working Group

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Overview

In an effort to find Alliance-wide efficiencies in electronic resource management (ERM), a 9 question survey was e-mailed to ERM representatives at each member school. Responses were collected April 2-24, 2013. Survey questions focused on present-day ERM product use and practices in order to give a transparent picture of ERM solutions/needs.

Key Results

28 of the 37 (75%) institutions responded. Of those responses:

- **Respondents reported a diversity of ERM product solutions and usage.**
 - For general ERM, the majority of respondents (53.8%) reported they used “Other” products in addition to or other than III Millennium ERM (34.6 %) or Serials Solutions 360 Resource Manager (23.1%). Products in the other category include No ERM (4), WorldCat Knowledge Base (3), Microsoft Access (2), Microsoft Excel (2), CORAL (1), ERMes(1), EbscoNet(1).
 - For COUNTER compliant reports, 70.4% of respondents reported they used “Other” methods than or in addition to Serials Solutions 360 Counter (44.4%). These other methods include manually (15), Excel (2), local system (2), Ebsco A-Z (1), Harrassowitz E-Stats (1), Scholarly Stats (1), Ustat (1), no Response (1).
- **The areas of common usage were:**
 - Proxy Server: 85.7% of respondents use EZ Proxy
 - OpenURL: 57.1% of respondents use Serials Solutions 360 link
 - Journals A-Z: 64% of respondents use Serials Solutions
 - Troubleshooting: 75% of respondents use an institutional e-mail troubleshooting list
- **Respondents are hopeful for solutions through Alma.**
 - 71.4% do not plan on utilizing any third-party ERM products after Alma

implementation.

- The top solutions respondents hope Alma will provide are: One system instead of many (4), streamlined workflows (3), data transparency (2), better communication between departments (2), and speed of updates (2).

Recommendations from CTST Serials/ERM Working Group

1) Given the assortment of technology currently used, institutions are entering into a new environment with multiple consequences. Not only is there the recognized need for training on how to use the Alma ERM capability, but also an implied need for a general grounding in concepts of electronic resources management. Not only would an Alliance-wide set of best practices help achieve greater efficiency, but would ensure the most robust experience of Alma's capacity would be fully-utilized throughout the Alliance.

2) Multiple institutions will be moving away from ILL/Serials Solutions products for their OpenURL link resolver and/or EZProxy. While cohort membership will determine when institutions start their migration, there is the possibility of connecting communities with like projects/challenges. Utilizing the strengths, ideas, and lessons of other organizations will assist with making a smoother transition for all institutions regardless of cohort.