Trends & Challenges for Electronic Resource Management

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ABSTRACT: The goal of medical librarians is to provide quality information for improved healthcare. The challenges presented by electronic resources add complexities which make us nostalgic for the simplicity of print. Medical librarians are charged with spending their scarce budgetary resources wisely to provide access to high quality, urgently needed content. Collection development decisions are driven by many factors. Price is just one. The challenge of finding the budgetary resources to meet continuing price increases will be demonstrated in this presentation by historical price lines for a sample of core clinical journals in medicine and nursing. The challenge for librarians who must now track changing pricing models, license terms, and hundreds of other data elements has been answered in part by electronic resource management systems (ERMs). Once a library purchases an ERM system, the next challenge is populating and maintaining the massive amounts of data associated with electronic resources. Without the data, an ERM system is just an expensive online filing cabinet. The trend now is toward automating the transfer of essential data between systems to ease the burden of manual data entry and improve accuracy. This presentation will propose how this process might work. Health librarians often face an additional challenge of providing electronic access to disparate users, and ensuring that access is granted to those who are entitled, while license conditions are observed and publishers' valuable content is protected from unauthorised use. This presentation will address the issue of authentication and will look at one solution available today.

FULL TEXT: I am Jay Glaisyer, Head of Business Development, ESBCO Australia, and I am presenting this paper on behalf of my co-author, Lynn Fortney, Vice President and Director of the Biomedical Division of EBSCO Information Services. EBSCO Information Services has over 50 years experience in providing service to librarians and in those 50 years, EBSCO has faced many challenges presented by the changing needs of librarians. Serials pricing, management and access issues are three of the challenges I shall address today.

The goal of medical librarians is to provide quality information for improved healthcare. This means that medical librarians, by necessity, must have access to the most efficient and effective systems available to manage the challenges presented by electronic resources. Providing for the informational needs of a healthcare provider with a critical patient care question should take a far higher priority than dealing with the complexities of electronic information. Sometimes trying to cope with electronic access and management issues make us nostalgic for the simplicity of print, when the most pressing issues were title and
frequency changes. However, there is one consistent issue, which has unfortunately been around for decades, and that is relentless price increases for medical journals.

Medical librarians are charged with spending their scarce budgetary resources wisely to provide access to high quality, urgently needed content. Collection development decisions are driven by many factors. Price is just one. The challenge of finding the budgetary resources to meet continuing price increases is difficult, but armed with information, medical librarians can show administrators that price increases for medical journals are far higher than other typical measures such as the Consumer Price Index. Since the 1980’s, EBSCO Information Services has published an annual report now called the “Price History for Core Clinical Journals in Medicine and Nursing”, covering the one hundred and seventeen journals that comprise the “core clinical journals” subset of MEDLINE. The price study is authored by Lynn Fortney and available at www.ebsco.com/ccpricehistory. The most recent study, published in April, 2009, covers 2005 – 2009. Results show that the total subscription cost for the 117 journals in the sample at the least expensive annual retail subscription rate available to non-membership institutions in the United States to be US$74,651.57 in 2009 compared to $53,260.33 in 2005, which is a 40.2% increase. The average price of a clinical journal in this sample was US$112.32 in 1990; it is $638.05 in 2009. The least expensive subscription option continues to be print, however in 2009, 26 journal subscriptions (22% of the sample) included some form of online access, up from 22 subscriptions in 2008. Of course, most of the journals in the sample set are now available electronically in a variety of pricing and access models, which presents yet another challenge for medical librarians.

The challenge for librarians who must now track changing pricing models, license terms, and hundreds of other data elements has been answered in part by electronic resource management systems (ERMs). Once a library purchases an ERM system, the next step is populating and maintaining the massive amounts of data associated with electronic resources. Without the data, an ERM system is just an expensive online filing cabinet. The trend now is toward automating the transfer of essential data between systems to ease the burden of manual data entry and improve accuracy.

It was Timothy Jewell’s research in 2001 that clearly revealed that a number of librarians were developing a variety of tools to try and deal with what was, even then, a growing concern. Out of Jewell’s research, the E-Resource Management Initiative (ERMI) was born with the hope that, rather than many librarians creating solutions for their own institutions, they would work together to define the ideal solution. The result was a report published in 2004 that included an entity diagram, detailed functional specifications and a data dictionary. ERMI defined an e-journal life-cycle, the premise of which is that virtually every e-resource undergoes the states of “Acquire” where purchase decisions are made; once acquired, many steps are involved with providing “Access”; once access has been provided, the resource and information about the resource must be “Administered” in various administrative modules. During its life a resource will likely need some kind of “Support” and finally at the end of the subscription periods it needs to be “Evaluated “to see if it should be “Renewed” at which point the cycle continues.

ERMI identified over 300 data elements, but with most ERM systems today, collecting and then inputting the necessary data is a huge problem for most medical librarians. The
existing processes are too complex and medical librarians simply do not have the time to devote to doing all the things necessary to efficiently manage their combined databases, individual e-journal subscriptions and publisher packages. If your library participates in one or more consortium deals, things can become very complicated indeed.

For instance, making decisions on publisher packages goes beyond just determining if a package contains the titles needed. Pricing of the package is often dependent on the current list of titles your library has with the publishers – which means assembling that list along with the amounts paid. Unfortunately it is not always possible to count on the publisher to have an accurate list. With full-text databases, all customers have the same list of titles which offer the same coverage under the same terms; however, with e-journals and e-journal packages, the title list and coverage is often unique to the library. Plus when you consider that the relative cost of an e-journal in a package is many times more than a title in a full-text database, it is of paramount importance to get the access to these valuable resources right.

EBSCO analyzed the data elements we capture and discovered that we have over 100 data elements that ERMI has defined as necessary to manage e-resources. In many cases, these are the same elements that librarians struggle to locate and add to their ERM systems. These essential data elements include tracking trials, managing database renewals, managing access to resources, supporting library staff, and flexible reporting related to collection development, license details, financial information, activation status and more.

Because EBSCO is a part of the e-resources supply chain, we are uniquely positioned to offer librarians an ERM approach that can significantly reduce the amount of time it takes to track down and enter the necessary information. EBSCO works with librarians, who need to purchase and manage content, and EBSCO works with publishers, who produce that content. EBSCO has detailed information on the orders our customers have placed through EBSCO, allowing us to build an integrated knowledge base that is far more comprehensive than any other available and is shared across EBSCO’s other services such as our A-to-Z listing service and LinkSource link resolver.

At this stage, it is appropriate to talk briefly about EBSCO’s solution to these issues, ERM Essentials. Initially with this service, EBSCO has focused on the essential, most requested and most useful features. One of the key features of ERM Essentials is our support for all e-resources (all e-journals, e-package, e-books, databases, etc. – not only those resources purchased through EBSCO) with the ability to store data about supply terms, access terms, administrative information, license details, terms of use, contacts and more. Automatic data population for e-resources purchased through EBSCO will be a critical time saver for librarians whose priorities are providing quality information for improved healthcare, NOT spending precious hours in back-office troubleshooting.

Consortium management features should simplify the management of shared purchases, whether they are through a formal consortium or a cooperative group of institutions. ERM Essentials is designed to allow an institution to participate in multiple consortia. Librarians will be able to see the deals offered participating consortia, see the price you would pay based on pricing model and attributes of your own institution (such as FTE, institution type,
etc.) and when your library does accept the deal, the holdings and other data elements related to your deal are automatically updated in your account. For the consortium administrator (or the library putting together a cooperative deal), ERM Essentials will help with managing the deal, the pricing, the attributes of the members, the workflow and the renewal process. ERM Essentials will be secure and confidential data will be kept confidential—the consortium administrator will be able to see only the details related to his or her consortium offerings. Consortium members will see only their own account and the deals offered to you by a consortium administrator. Librarians cannot see details of other consortium members, nor can the consortium administrator see details of the deals you acquired through other resources.

We are particularly excited about the collection development tools, which will allow librarians to dig deeper into your collections and get at the details you need to make informed decisions. For example, if you are reviewing a cost-per-use report and discover a title that you may be concerned about, you can instantly see if other databases in your collection offer the title, and if so, with what coverage, and if perpetual access is allowed. Furthermore, you will be able to see if you are prevented from cancelling the title because it is in a publisher package. The collection development tools will provide a jumping-off point to get at other details, such as impact factor, or a quick review of the title’s importance to your institution by viewing statistics representing articles written and articles cited by your faculty, medical staff, or researchers.

As you would expect of a global knowledge base, EBSCO’s Integrated Knowledge Base offers details on packages, their title lists, coverage, etc. Plus, it also provides additional information that EBSCO collects from publishers about their offerings, including the access and registration details and license information. Obtaining cost and related financial information is a big challenge for ERMs; with ERM Essentials, this information is obtained from your order history.

A typical ERM system has a variety of fields that must be populated. The difference with ERM Essentials is that EBSCO is able to automatically populate many of the necessary fields—for instance, instructions and URLs in the Access fields, supply details, license details, and terms of use.

The Collections Manager allows viewing of Vendors, Databases, or Packages, Title and Orders, etc., including key data about the resource arranged by category, such as access terms, contact, license details, supply terms, term of use and trial information.

In designing ERM Essentials, EBSCO drew from the list of data fields identified as important by the ERMI Report. To fit your own institution’s specific needs, librarians can rename, reorder, or even suppress fields. A legend indicates the source of the data, be it from EBSCO or locally entered. ERM Essentials will also offer a system of Reminders and Tasks to assist with the workflows involved in managing e-resources.

Health librarians often face an additional challenge of providing electronic access to disparate users, and ensuring that access is granted to those who are entitled, while license conditions are observed and publishers’ valuable content is protected from unauthorised
use. EBSCO has recognised that challenge and approached a company called Eduserv a couple of years ago to offer Australian and New Zealand health libraries electronic access using Athens authentication. This proven authentication solution was developed for the National Health Service in the UK and is now used not only by NHS, but also by many UK academic libraries.

Now, 2 years after the introduction in Australia, many health libraries across Australia use Athens authentication to offer their users single sign-on access to all subscribed online resources, using one personal logon, independent of IP-addresses.

Users can access resources from anywhere, on-site or remotely. Their personal logon is customisable and can consist of the user’s email address and a self-chosen password to make it even easier to remember. Our people in the local EBSCO offices in Australia offer extensive support in setting up Athens accounts and ensuring that subscribed resources can be accessed via Athens.

Publishers have recognised Athens as a highly secure authentication system that will protect their valuable content from unauthorised use. Some publishers even offer discounted prices for their content if Athens is used by the library.

Serials pricing, management and access issues are three challenges facing medical librarians. Gaining knowledge about serials pricing trends, learning about management systems designed to save time and approve efficiency, and exploring access solutions are important for medical librarians who wish to use their scarce budgetary resources wisely to provide access to high quality, urgently needed content. Quality information, when and where the healthcare provider needs it, should be everyone’s goal.

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