So You’ve Got the ERM Module, Now What?

Northwest Innovative Users Group Conference
University of Portland, 2008
Wendy Stewart, Portland State University
Diane Carroll, Washington State University Libraries
So you’ve got the ERM module, now what?

- Take a Deep Breath
- Baby Steps
- Prioritize
- Define
- Implement
So You’ve Got the ERM Module, Now What?

- Prioritize
  - Resource Records
  - License Records
  - Contacts Records
- Create Lists and ERM
Define

- Resource and License Records
  - Variable Fields
  - Fixed Fields
Resource Records

The ARTstor Digital Library is comprised of digital images, their corresponding data and the tools to make active use of those images. ARTstor documents artistic and historical traditions across many time periods and cultures and focuses on, but is not limited to the arts. ARTstor is designed to be used by researchers in fields that do not traditionally use images, as well as by art historians.

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Resource Records

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Additional Contact: Wendy Stewart, stewartw@pdx.edu

Description: ARTstor Digital Library is comprised of 780,000 images digital images and their corresponding data and the tools to make active use of these images.

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This is a licensed database and is intended for educational non-commercial use only.

ARTstor

Name: ARTstor
Event Date: 20080930
Fixed Field Date: 07/15/2001
Sent to: westonc@pdx.edu, beardo@pdx.edu, spalding@pdx.edu, stewartw@pdx.edu, kennichim@pdx.edu
Subject: find money now!
Header: We will need to pay the AAF for 2011
## Resource Records

![Resource Records Interface](image)

### Edit Functions

- **Access Provider**: acm - Association for Computing Machinery
- **Resource Name**: Association for Computing Machinery
- **Staff Notes**: Only load titles that are in SFX target
- **Resource Type**: Electronic Journal Collection

### Summary

- **Record 110015036**
- **Last Updated**: 07-22-2008
- **Created**: 06-06-2008
- **Revisions**: 2

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<th>n</th>
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<th>Concurrent Users</th>
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<td>NO</td>
<td>Title Changes</td>
<td>u</td>
<td>UNKNOWN</td>
<td></td>
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### Site Definition
- **WSU All**
  - **IP addresses**: 8.22/2007: sent site description for WSU ALL.sh
  - **IP addresses**: 8.23/2007: 68.179.221.223, 134.121.\^1, 192.31.216.\^1, 192.94.22.\^1, 192.138.182.\^1, 192.220.200.207, 198.47.13.\^1, 199.237.65.\^1, 199.237.67.95, 199.237.69.\^1
• Add word tables here
Templates

Populating the ERM License Records

• Terms of Use
• Signed License
• Open Access

http://wiki.wsu.edu/wsuwiki/License_Records#Type_of_agreement: Terms_of_Use_djc
Templates

Type of agreement: Terms of Use
  – Guidelines or terms of use are posted on a website
  – No signed license

Resource Record
  – Licensed = T – Terms of Use.

License Record
  – Fixed field defaults used in template:
    – Confidential = n (no)
    – Auto Renew – leave black
    – Status = None
    – Type = Click thru
License Records

Edit Functions

Record 10000653

Access Provider: Elsevier Inc.
Resource Name: Elsevier ScienceDirect (Subscribed)
Resource URL: http://www.sciencedirect.com/science/journals

Summary | Record 10000653 | Contacts | Financial | Usage Statistics

10000653 | Last Updated: 09-30-2008 | Created: 12-05-2003 | Revisions: 31

Confidential: SILENT
Auto Renew: YES
Status: ACTIVE
Type: SITE LICENSE
Changes to Contract: NULL
Perpetual Access: YES
Archiving Right: YES

Site Definition: WSU All
IP addresses: 68.176.221.223, 134.121.1, 192.94.22. * 192.138.182.
192.228.200.207, 190.17.113, 199.237.66.0 191.199.237.87-95.
207.180.118-119.
216.186.59.156-255

License Location: http://ars.lib.wsu.edu/ars/documentview.aspx?associd=10538
Authorized Users: Faculty, staff, undergraduates, graduates, walk-ins, administration

NWIUG October 16, 2008
Admin- Settings – Record Templates – Record type - License

<table>
<thead>
<tr>
<th>Confidential</th>
<th>Auto Renew</th>
<th>Warranty</th>
<th>Status</th>
<th>Type</th>
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<th>Termination Procedure</th>
<th>Perpetual Access</th>
<th>Archiving Right</th>
<th>Concurrent Users</th>
<th>Breach Cure</th>
<th>Licenses Sign Date</th>
<th>Licensor Sign Date</th>
<th>Contract Start Date</th>
<th>Contract End Date</th>
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<td></td>
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</tbody>
</table>

Usage Guidelines: [General Usage Guidelines](http://www.westlib.uws.edu/Collections/responsibleuse.htm)

Terms of use (Staff): Download limited portions; Print limited portions
Terms of use (Patron): Faculty, staff, undergraduates, graduate students, walk ins
Authorized Users: Faculty, staff, undergraduates, graduate students, walk ins
Authentication Method: EZProxy, IP Range
License Records

❖ Post-cancellations rights

Fixed field: Archival rights - The right to permanently retain an electronic copy of the license materials. When "yes" is entered, add an Archiving Format variable field.

n = No; y = YES; u=Unknown (have not researched yet)

http://wiki.wsu.edu/wsuwiki/License_Records#Table_of_ERM_License_Record_Codes_and_Definitions_for_WSU_djc

NWIUG October 16, 2008
Post-cancellations rights

- **Fixed field: Perpetual access**
  The right to permanently access the licensed materials online paid for during the period of the license agreement.

  y = YES; n = NO; u=Unknown (have not researched yet)
Post-cancellations rights

Variable Field: Archiving Format (g)- The format of the archival copy. Multiple choices are allowed.

- CD-Rom, tapes
- LOCKSS
Post-cancellation rights

Fixed field: **Official archive**

What is the format of the official archive?

Official = copy that needs preservation

p = print; e=electronic; u=unknown
Contact Records
Used to populate fields in Resource records
### Washington State University Libraries - Mozilla Firefox

**Search History**

- **PROVIDER**: elsevier
- **View Entire Collection**:

**System Sorted**

#### Result page:

**Provider**
Elsevier ScienceDirect (Subscribed)

**Resource Advisory**
Available to WSU all campuses Report problems

#### Usage Guidelines

**General Usage Guidelines**
- Download limited portions;
- Print limited portions;
- Electronic Reserves Linking;
- CoursePack Linking;
- Share for scholarly purposes;
- Arial ILL - must print first then scan;
- No ILL outside country (international including Canada);
- No Commercial Use;
- Archival format: electronic

#### Terms of Use

- Unlimited

#### Library Staff Notes

- Faculty, staff, undergraduates, graduates, walk-ins, administration

#### Concurrent Users

- Unlimited

#### Restricted to

- Faculty, staff, undergraduates, graduates, walk-ins, administration

#### Link to Full Text

<table>
<thead>
<tr>
<th>Title</th>
<th>E-Holdings</th>
<th>Link to Griffin Record</th>
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<tbody>
<tr>
<td>Accident analysis and prevention -- Elsevier ScienceDirect</td>
<td>Jan. 01, 1995-</td>
<td>Accident analysis and prevention [electronic resource].</td>
</tr>
<tr>
<td>Accounting, management, and information technologies -- Elsevier ScienceDirect</td>
<td>Jan. 01, 1995- Dec. 31, 2000</td>
<td>Accounting, management, and information technologies [electronic resource].</td>
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**Done**
<table>
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<tr>
<th>Contact Code</th>
<th>ebscp</th>
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<tr>
<td>Organization Name</td>
<td>Ebsco Publishing</td>
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<tr>
<td>Phone Number</td>
<td>800-653-2726</td>
</tr>
<tr>
<td>URL</td>
<td><a href="http://epnet.com">http://epnet.com</a></td>
</tr>
</tbody>
</table>

**Contact Person**

<table>
<thead>
<tr>
<th>Role/Name</th>
<th>Inside sales rep for online access / Ben Ganley / Academic Account Executive</th>
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</thead>
<tbody>
<tr>
<td>Address</td>
<td>Ebsco Publishing</td>
</tr>
<tr>
<td>Phone</td>
<td>(800) 653-2726 x2430</td>
</tr>
<tr>
<td>Fax</td>
<td>(978) 356-5640</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:bganley@ebscohost.com">bganley@ebscohost.com</a></td>
</tr>
<tr>
<td>Notes</td>
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**Contact Person**

<table>
<thead>
<tr>
<th>Role/Name</th>
<th>Customer Account Specialist / Ed Martin</th>
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<tbody>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>800-653-2726 x2338</td>
</tr>
<tr>
<td>Fax</td>
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</tr>
<tr>
<td>Email</td>
<td><a href="mailto:emartin@ebscohost.com">emartin@ebscohost.com</a></td>
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<tr>
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<th>Technical Support</th>
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<tbody>
<tr>
<td>Address</td>
<td><a href="http://support.epnet.com">http://support.epnet.com</a></td>
</tr>
<tr>
<td>Phone</td>
<td>800 758-6995</td>
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<tr>
<td>Fax</td>
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</tr>
<tr>
<td>Email</td>
<td><a href="http://support.epnet.com/contact/askus.php">http://support.epnet.com/contact/askus.php</a></td>
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<td>Notes</td>
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## Contact Records

![Software by Innovative Interfaces, Inc. Used with permission. Screen image courtesy of Washington State University](image)

### Insert a non-MARC field

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<tr>
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<tr>
<td>Email</td>
<td><a href="http://support.epnet.com/contact/askus.php">http://support.epnet.com/contact/askus.php</a></td>
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stewartw@pdx.edu

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carrolldi@wsu.edu