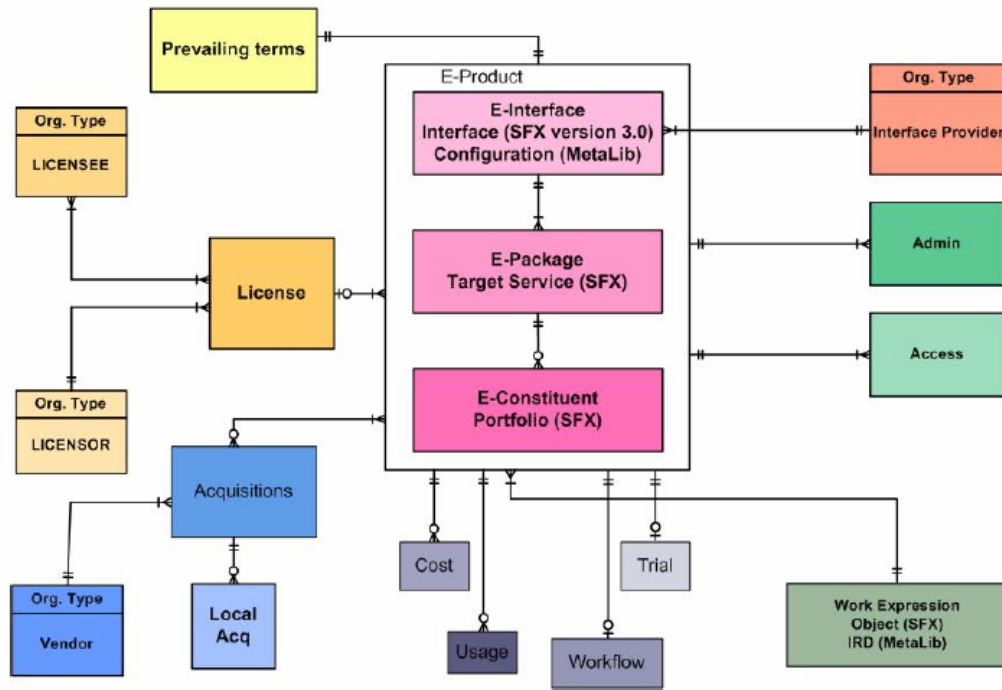


E-Resources Management 'Verde' Entity Relationship Model



I: Information about e-Interface

The screenshot shows the Verde web application interface. At the top, there is a navigation bar with 'Verde Tasks', 'KB Manager', 'KB Tools', and 'Admin'. Below this, the main content area displays 'Managing: e-Products' and 'Acquisition Records List'. A table with columns 'Start subscription', 'End subscription', 'ACQ Number', 'Purchase Order #', 'Status', and 'Actions' is visible. A red arrow points to the 'Actions' column header.

The **Work record** for Journal of the Society for Industrial and Applied Mathematics

The screenshot shows the Verde library management system interface. At the top, there are navigation tabs for 'Verde Tasks', 'KB Manager', 'KB Tools', and 'Admin'. The main header area includes the Verde logo and the text 'Ex Libris U'. Below this, there are breadcrumb links: 'siam' > 'LOCUS - SIAM's Onl...' > 'Journal of the Soc...'. The main content area is titled 'Journal of the Society for Industrial and Applied Mathematics' and includes a 'Managing:' dropdown set to 'e-Products'. Action buttons for 'New Work', 'New Search', 'View Basket', and 'View I' are visible. A summary section shows 'Code: INST1', 'SFX ID: 110975500577317', and 'MetaLib ID:'. Below this is a 'Field details' table with columns for 'Field', 'Details', and 'Action'. A 'Select fields:' list on the left contains various metadata fields, each with a star icon. The 'Field details' table contains the following data:

Field	Details	Action
ISSN	0368-4245	[Action Icon]
Title	Journal of the Society for Industrial and Applied Mathematics	[Action Icon]
Imprint	Society for Industrial and Applied Mathematics. Philadelphia,	[Action Icon]
Category	Engineering Fluid Engineering	[Action Icon]
e-Product Type	JOURNAL	[Action Icon]
Continued by	SIAM journal on applied mathematics	[Action Icon]
SFX	110975500577317	[Action Icon]

The 'Select fields:' list includes: LCCN, CODEN, eISSN, Author, Corporate Author, Abbreviated Title, Display Title, Imprint, Update frequency, Category, Time Span, Coverage Note, Description, Copyright, e-Product Type, e-Product Format, Language, Continues, Continued by, Local 1 through Local 9, and MetaLib ID.

The Report for an e-Product: Shows available data fields

The screenshot displays the 'Report' configuration page in the Verde system. At the top, there is a navigation bar with 'Verde Tasks', 'KB Manager', 'KB Tools', and 'Admin'. The 'Report' tool is selected. The left sidebar shows a tree view with 'E-Product' and 'General report of e-Product' selected. The main area is divided into three sections: 'Task properties', 'Delivery properties', and 'Acquisition'. The 'Task properties' section includes options for filters on active records, including constituents, and various selection criteria like 'E-product status', 'Selection status', and 'Availability down'. The 'Delivery properties' section includes 'File Format' (set to CSV) and an 'Email' field. The 'Acquisition' section includes 'Acquisition status', 'Vendor', 'Budget', 'Price', and 'Material type'. A red arrow points to the 'Acquisition status' dropdown menu, which is currently set to 'New'.

Order date:	=	<input type="text"/>	
License			
License type:		Regular Prevailing Supplemental	
License status:		New In negotiation Under review	
License method:		Negotiated Click through Online	
Start date:	=	<input type="text"/>	
End date:	=	<input type="text"/>	
Execution date:	=	<input type="text"/>	
Licensee:		<input type="text"/>	
Licensor:		<input type="text"/>	
Perpetual access rights:		Yes No Undetermined	
Archiving rights:		Yes No Undetermined	
Remote access:		Yes No	
Fair use clause:		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Ignore	

Consortial Resource, Order Record:

b30856887

TITLE Journal of the Society for Industrial and Applied Mathematics
 CALL # QA1.S62
 IMPRINT Philadelphia, Society for Industrial and Applied Mathematics
 ISN/MUSIC # 0368-4245
 LOCATIONS n , s

Summary Record o745546x Receive o745546x Payments o745546x 0 Bib-Level Holds

Queue P.O. [View Finances](#)

o745546x Last Updated: 09-15-2005 Created: 04-26-1999 Revisions: 8

ACQ TYPE	1 SUBS-PT	E PRICE	\$0.00	RLOC	w WEB
LOCATION	n Internet	FORM	f ELEC. FILE	BLOC	a ACCOUNTS
CDATE	- -	FUND	cdlse CDL Serials	STATUS	f SERIAL NO ENC
CLAIM	n NO CLAIMS	ODATE	04-26-1999	TLOC	- ---
COPIES	1	ORD NOTE	- -	VENDOR	cdl California Digital Library
INPUTTER	o JO	ORD TYPE	s SUBSCRIPTION	LANG	eng English
TAX	n NOT TAXABLE	REACTION	- ---	COUNTRY	xxu U.S. (state not known)
COLL DEV	1 DR	RDATE	- -	VOLUMES	0
RECEIVING	- -				

NOTE JSTOR: for payments, see PO#740508x
SPEC NOTE MATHEMATICS(1)

Local Subscription, Order Record

b21607588

TITLE Journal of applied social psychology.
 CALL # HM251.A1 J64
 IMPRINT Silver Spring, Md. [etc.] V.H. Winston [etc.]
 ISN/MUSIC # 0021-9029
 LOCATIONS n , r

Summary Record o2551640 Receive o2551640 Payments o2551640 0 Bib-Level Holds

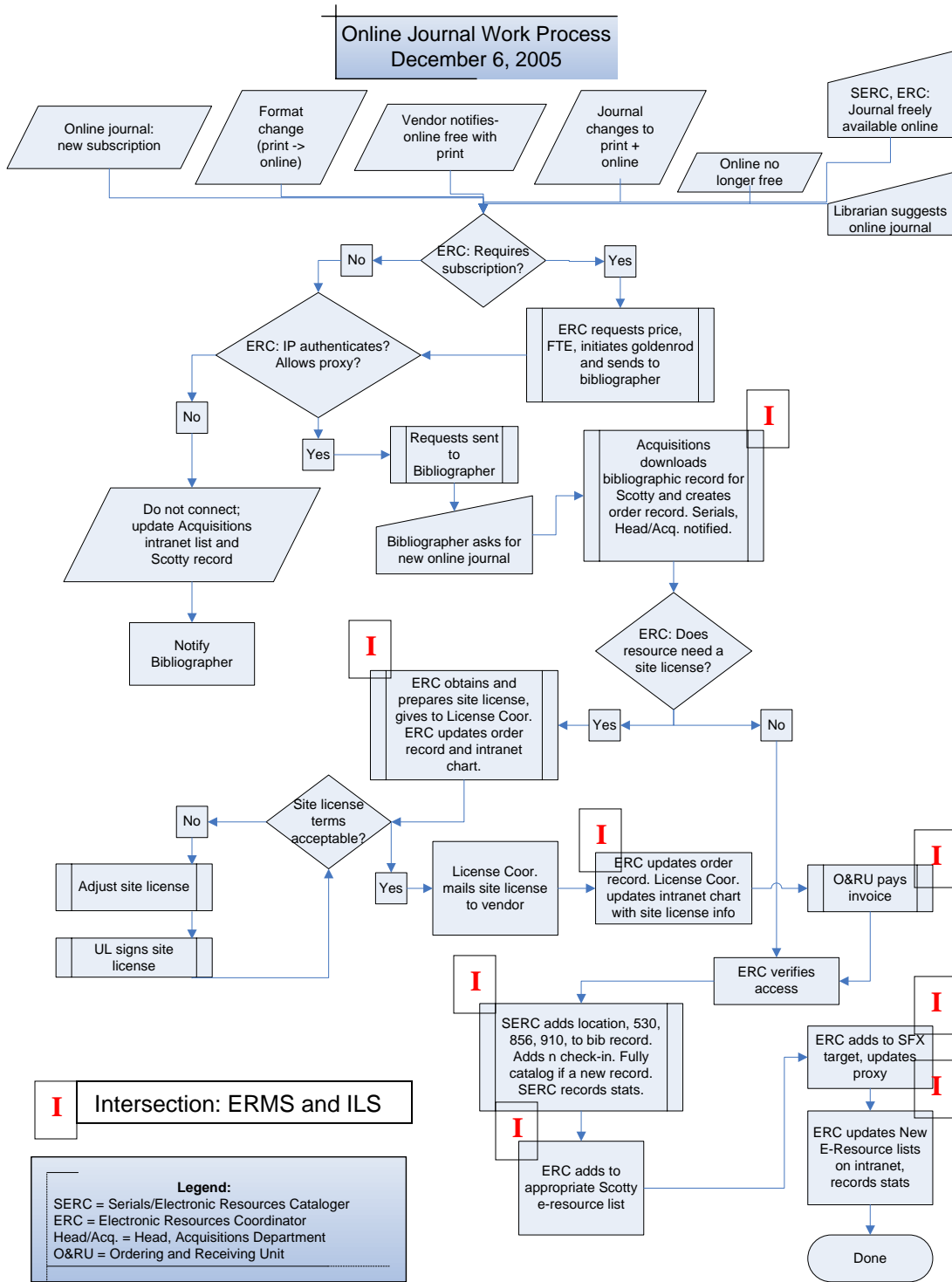
Queue P.O. [View Finances](#)

o2551640 Last Updated: 12-07-2005 Created: 09-22-1986 Revisions: 68

ACQ TYPE	p PURCHASE	E PRICE	\$0.00	RLOC	s RIV SERIAL
LOCATION	rstk Rivera	FORM	s SERIAL	BLOC	a ACCOUNTS
CDATE	- -	FUND	glser Gen Lib Ser/Renew	STATUS	f SERIAL NO ENC
CLAIM	n NO CLAIMS	ODATE	- -	TLOC	
COPIES	1	ORD NOTE	- -	VENDOR	ebSCO EbSCO
INPUTTER		ORD TYPE	s SUBSCRIPTION	LANG	eng English
TAX	n NOT TAXABLE	REACTION		COUNTRY	xxu U.S. (state not known)
COLL DEV	3 JBR	RDATE	- -	VOLUMES	1
RECEIVING	- -				

NOTE Online included free with print. No site license required per vendor email 9/7/2005, meh.
NOTE Subscriber No. : #0037J
SPEC NOTE PSYCHOLOGY(1)
SPEC NOTE SOCIOLOGY(1)
VEN ID LA7721100AA469707004
VEN ID LA7721111AA468744511

PAID	DATE	INVD	INV#	AMT	VOUCHER	COPIES	NOTE
	12-07-2005	10-28-2005	0271862	\$962.48	958770	001	36(01/06)-36(12/06);Y178



Checklist: Preparing for an ERMS

1. What is the ERMS capable of?
 - a. Manage resource lifecycle
 - i. All info in one place
 - b. Facilitate collection development
 - i. Cost analysis
 - c. Local and consortial status
 - d. Automate upkeep
 - e. Record resource relationships
 - f. Manage license
 - g. Reports
 - h. Other?
2. What does your institution hope the ERMS will do?
 - a. Populate local and consortial data
 - b. Allow one-click investigation
 - c. Live bridge to ILS
 - d. Show who owns what
 - e. Track desiderata
 - f. Show consortial status
 - g. Provide new resource alerts
 - h. Allow multi-year budget data
 - i. Manage statistics, usage and vendor-supplied
 - j. Renewal alerts
3. Coordinating with Acquisitions, Cataloging and Collection Development: Needs assessment and functionality analysis
 - a. Descriptive: bibliographic information
 - b. Licensing: authorized users and uses, restrictions on downloads, courseware, e-reserves, searches.
 - c. Financial: price, inflation rate, funds affected, cancellation allowances.
 - d. Administrative: administrative site location, account, user name, password, vendor and other contacts
 - e. Usage: vendor usage statistics, institution usage statistics
 - f. Status: active, desiderata, inactive, rejected
 - g. Consortial status
 - h. Bridges to ILS, OpenURL, metasearching tools': connections and status
 - i. Reporting
4. Coordinating with Acquisitions, Cataloging and Collection Development: fitting dreams into reality
 - a. Mapping tools and fields to fields.
 - b. Adjust functions/fields to local situation
 - c. Adjust work processes
 - d. Mechanism for communicating changes, updates and recording feedback from staff
 - e. Training
 - f. Discuss timelines
5. Organizing Data:
 - a. ILS Extractions
 - i. Subscriptions
 - ii. Vendor list
 - iii. Payment information
 - iv. Licensing
 - b. What is the consortium providing?
 - c. What local information is needed?
 - i. Collection Development vendor list
 - ii. Desiderata list

6. Plan Uploads
 - a. Prepare XML/DTD
 - b. If ERMS and ILS are dynamically linked, set up linking parameters
 - c. If not, plan batch loads, including staffing.
 - d. Massage local data if needed
7. Upload data
 - a. Provide mechanism for evaluation, feedback and improvement.
 - b. Establish workflow and responsibilities.
8. Testing
9. Release
10. De-Brief
 - a. Gather process observations
 - b. Assemble into final report; include recommendations that affect organizational change.

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