Beyond Go-Live: Mastering ERM in Everyday Use

From Implementation to Operation: More than one year with the ERM (Electronic Resource Management) module in Koha

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Before Koha (and ERM)

Where we started…

- invoices processed in former library system (i3v)
- agreements stored across print and digital formats, lacking a unified structure
- no automated statistical data harvesting
- multiple systems in use:
  - LAS:eR (ERM tool, mainly for consortia licenses)
  - i3v
  - EZB (Electronic Journals Library)
  - DBIS (Database Information System)
- no centralized access to license information, leading to time-consuming searches and inconsistencies

Conception of ERM module

What we aimed for…

…one system containing all relevant information.

We wanted a system that would support and facilitate our existing workflows, could assist us with daily tasks and reduce manual effort wherever possible.

The answer was simple: Koha ERM!

An ERM module with continuous developments as well as the possibility to adjust and have in-house developments and that grows with the community.

Conception of ERM module

- defining use cases and workflows
- identifying overall requirements for the ERM module (Agreements, eHoldings, eUsage)
- designing a suitable data structure (e.g. by creating additional fields)
- automation of processes required technical solutions

- decision not to use the ‘Licenses’ section to avoid redundant information
- various roles of term ‘vendor’ in different contexts:
  - vendor (basket/order)
  - publisher=legal counterpart (agreement),
  - platform (package)

Conception of ERM module

Challenges to consider for us:

- 3 institutions (KIT, HKA and DHBW) in 1 system
- institutional and single user licenses

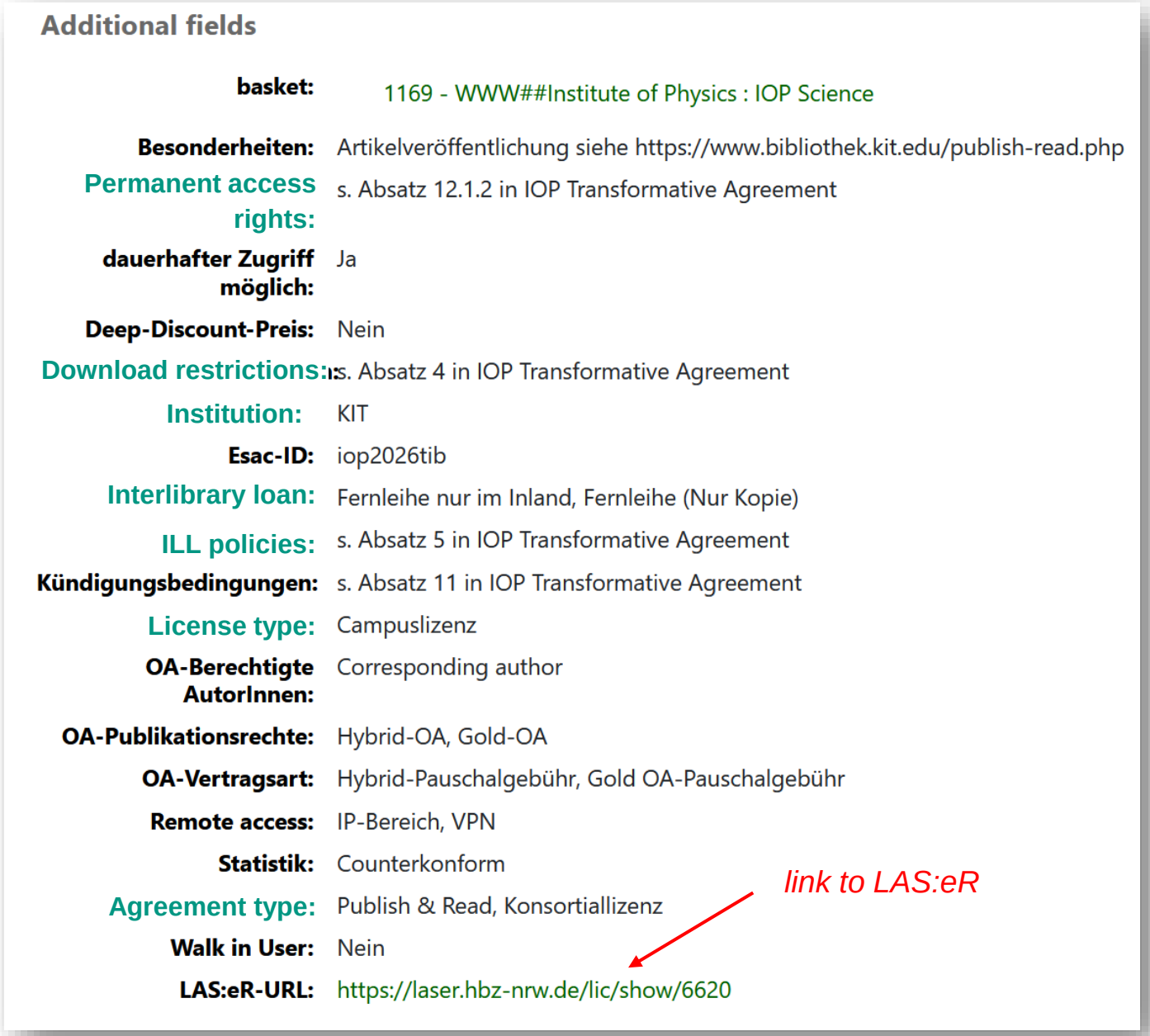
- diverse license types:
  - locally licensed products and consortial licenses
  - transformative agreements (e.g. DEAL)
  - Open Access (OA) aspects
- different resource types (ebooks, databases, ejournals)
- several data sources and different data flows as well as non-digital files
- some licenses lack formal agreements; only terms and conditions
- extracting information from agreements is time-intensive

→ retroactive integration projected to take 1.5 – 2 years

Working with Koha ERM – Agreements

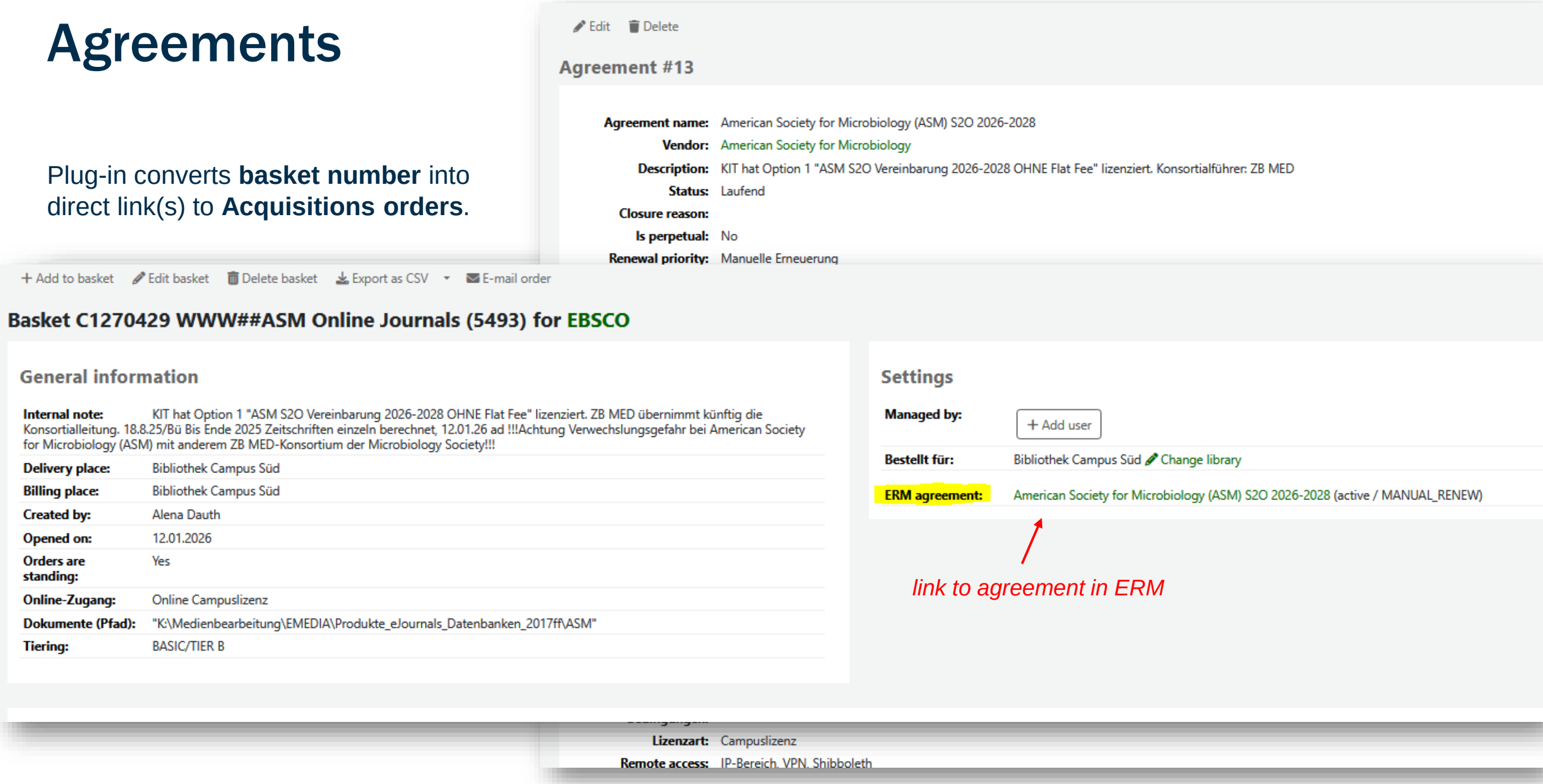
Additional fields representing key aspects from the agreement text

- result of our administrative structure (e.g. institution)
- referencing legal details from the agreement document (e.g. ILL policies)
- prioritizing frequently accessed information (e.g. permanent access rights, download restrictions)
- **authorized values** to ensure consistency
- **direct link to LAS:eR** for cross-platform access



Agreements

Plug-in converts **basket number** into direct link(s) to **Acquisitions orders**.



Agreements

Reporting efficiency:

- Which eJournals from this publisher have we licensed?
- Which eBook-packages have we licensed for which institution and period?
- How much money have we paid for electronic resources for a certain publisher? (e.g. OASA)

Alle Rechnungen zu einem Agreement Lieferanten im ERM Report ID: **218**

Notes: Optionale Eingabeparameter Lieferant des Agreements im ERM ! Dies ist nicht zwangsläufig der Lieferant im Basket ! Falls gewünscht kann eine Einrichtung angegeben werden

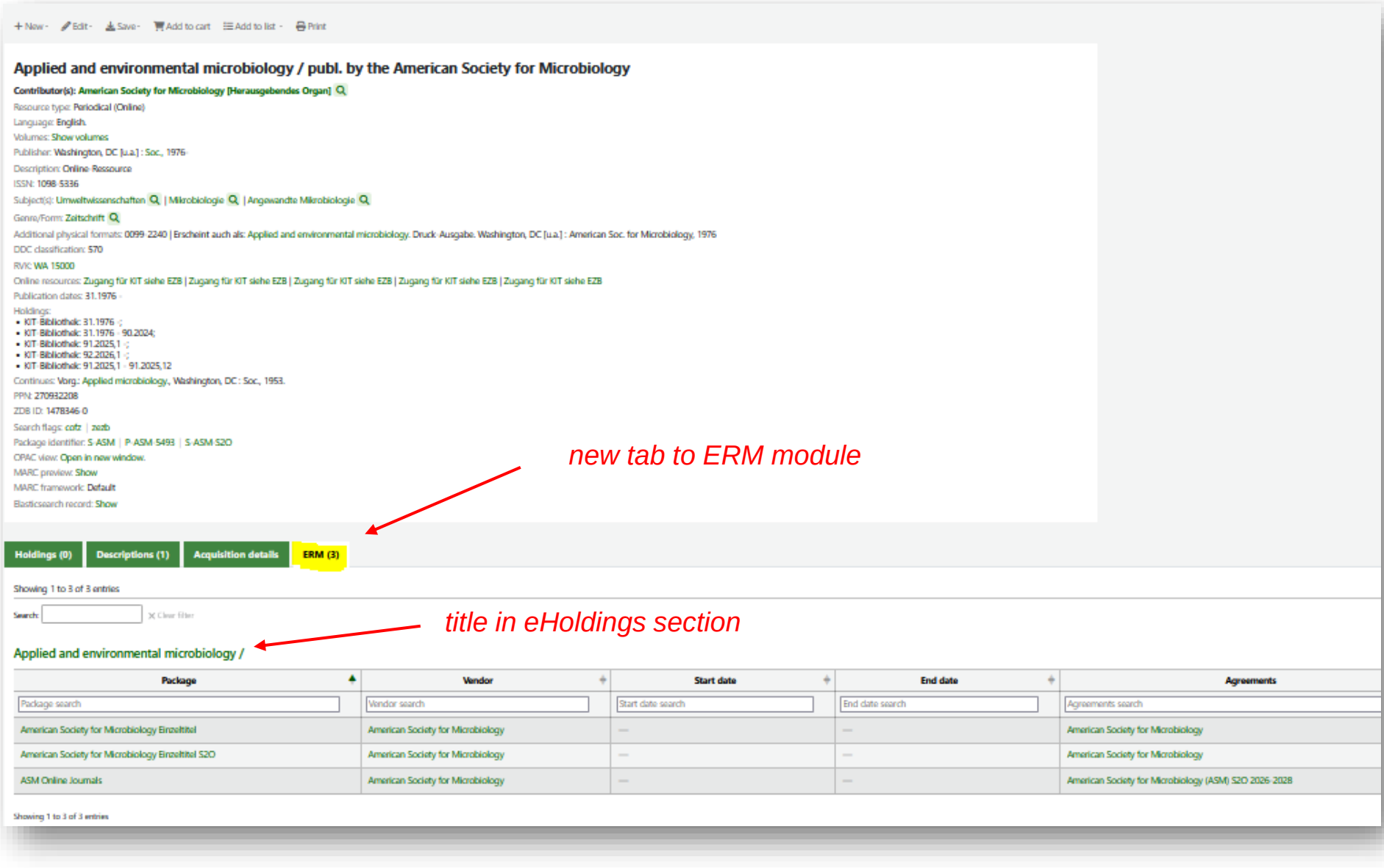
Total number of results: 4

Agreement	Basket	Rechnungsnummer	Preis	Einrichtung	Notiz	Titel
American Physical Society Read and Publish License Agreement	3647	2525932	54.834,95	KIT	2025_Reading fee	APS journals /
American Physical Society Read and Publish License Agreement	3647	2525933	7.381,05	KIT	2025_Publishing fee	APS journals /
American Physical Society Read and Publish License Agreement	3647	2625563	46.367,98	KIT	2026_Reading fee	APS journals /
American Physical Society Read and Publish License Agreement	3647	2625564	16.087,66	KIT	2026_Publishing fee	APS journals /

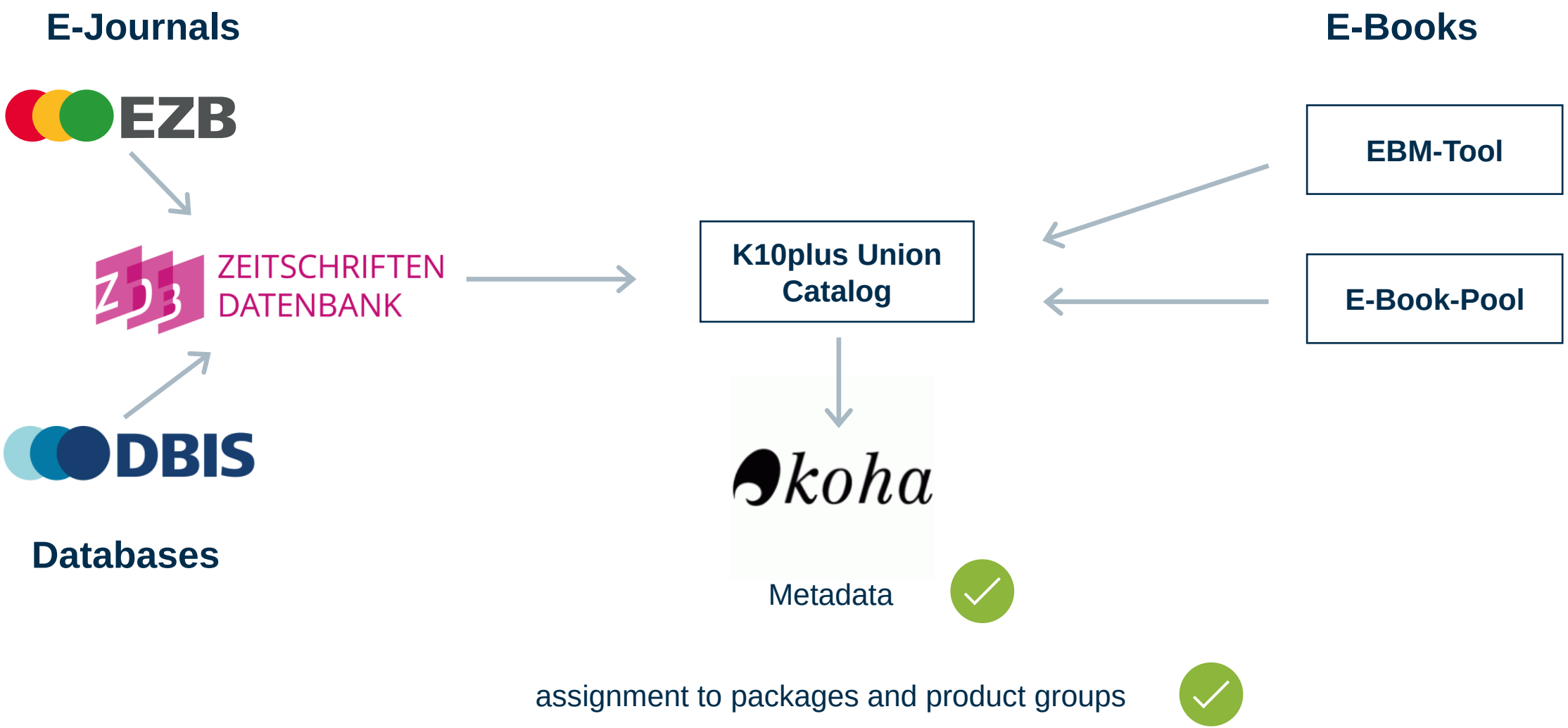
Catalog

ERM tab that shows all ERM relevant links:

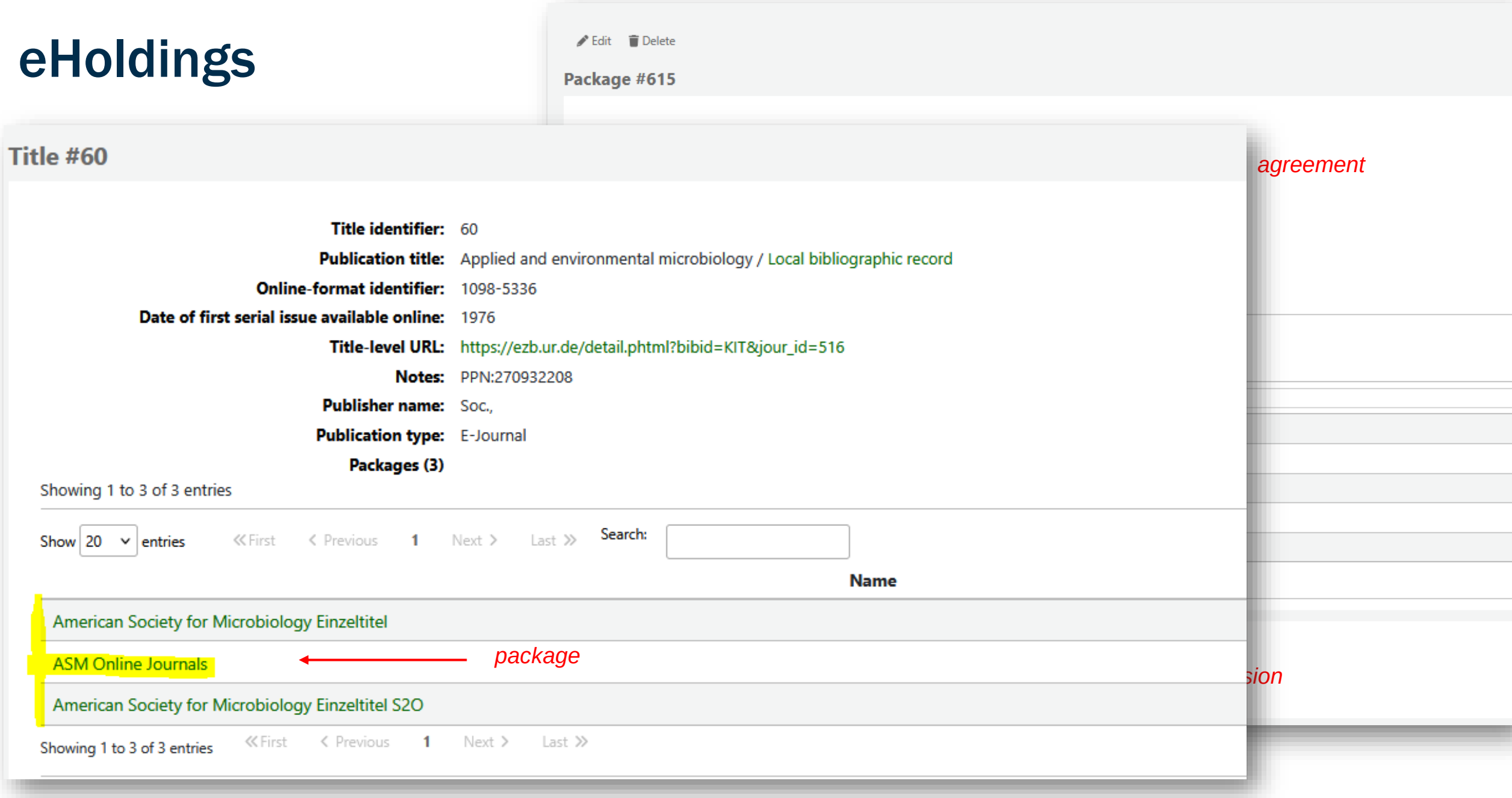
- title in eHoldings
- package(s)
- agreements
- vendor (from package)



eHoldings


E-Journals
EZB
ZEITSCHRIFTEN DATENBANK
DBIS
Databases
K10plus Union Catalog
koha
E-Books
EBM-Tool
E-Book-Pool
Metadata
assignment to packages and product groups

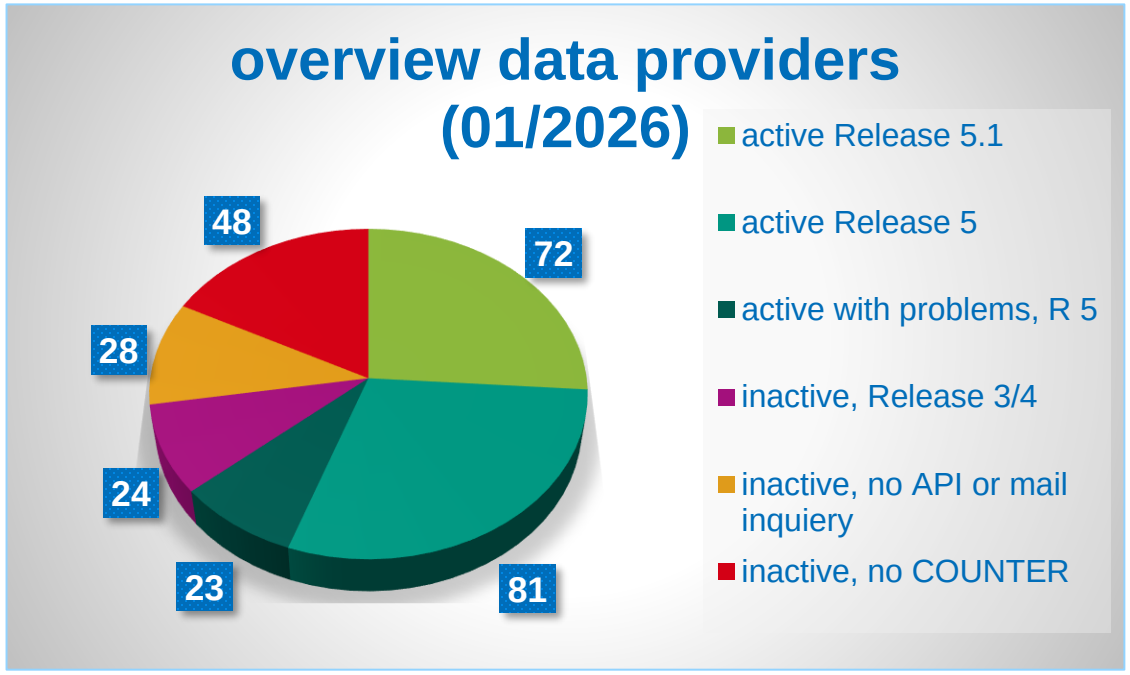
eHoldings

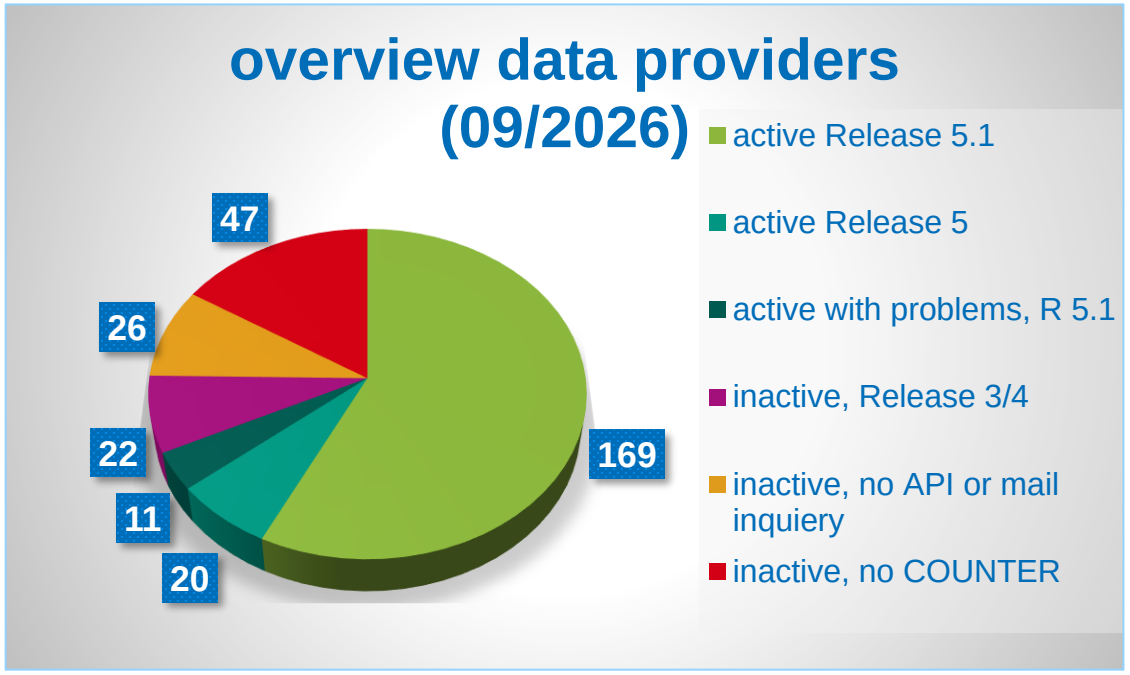

Edit
Delete
Package #615
agreement
Title #60
Title identifier: 60
Publication title: Applied and environmental microbiology / Local bibliographic record
Online-format identifier: 1098-5336
Date of first serial issue available online: 1976
Title-level URL: https://ezb.ur.de/detail.phtml?bibid=KIT&jour_id=516
Notes: PPN:270932208
Publisher name: Soc.,
Publication type: E-Journal
Packages (3)
Showing 1 to 3 of 3 entries
Show 20 entries
First
Previous
1
Next
Last
Search:
Name
American Society for Microbiology Einzeltitel
ASM Online Journals
package
American Society for Microbiology Einzeltitel S2O
Showing 1 to 3 of 3 entries
First
Previous
1
Next
Last
sion

eUsage

Management of data providers (starting 2024):

- administration of access credentials
- automated harvesting process with COUNTER API (formerly SUSHI)
- contact to data providers for non-working credentials and/or harvesting processes due to technical or other problems (e.g. invalid JSON or no COUNTER-compliant data)





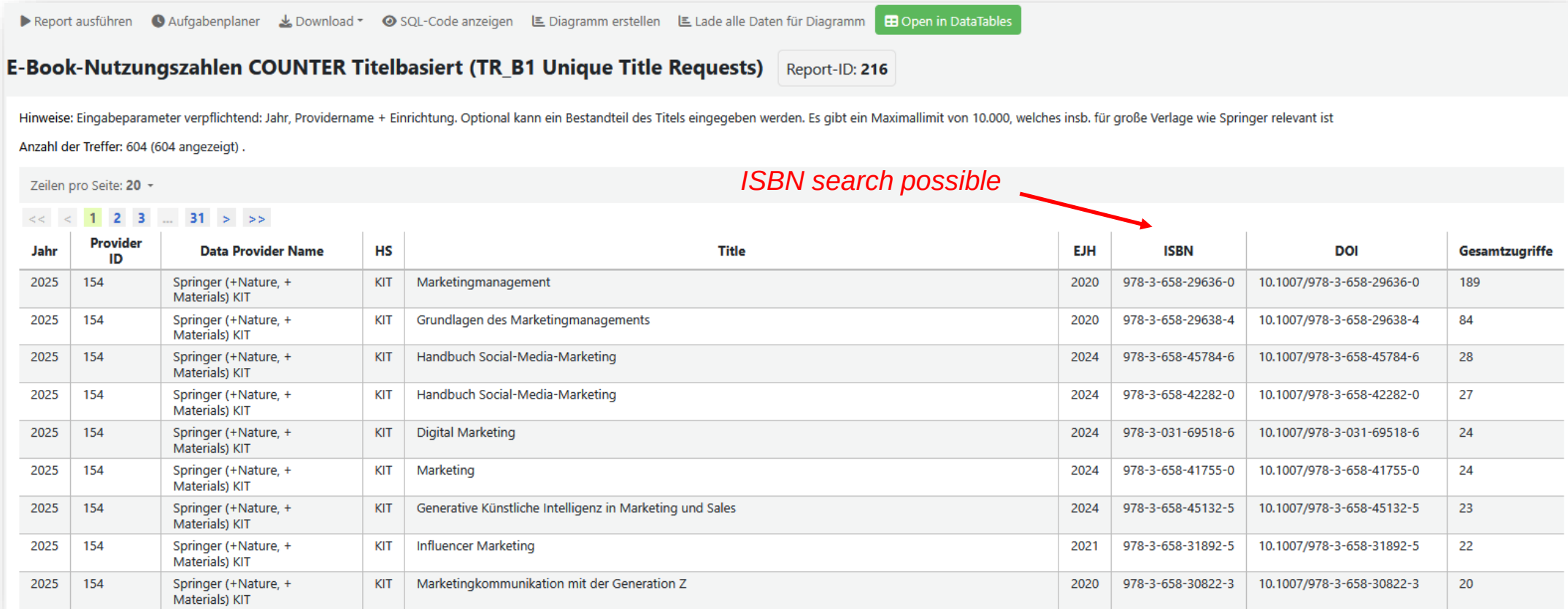
eUsage

Automated harvesting process that enables data transfer directly into Koha

- allowing access to all relevant, resource-based information in one system

Monthly harvesting for educated/reasonable up-to-date acquisition decisions made visible in reports for different use cases and staff members.

Access of title statistics directly in Koha:



Report ausführen | Aufgabenplaner | Download | SQL-Code anzeigen | Diagramm erstellen | Lade alle Daten für Diagramm | Open in DataTables

E-Book-Nutzungszahlen COUNTER Titelbasiert (TR_B1 Unique Title Requests) Report-ID: **216**

Hinweise: Eingabeparameter verpflichtend: Jahr, Providername + Einrichtung. Optional kann ein Bestandteil des Titels eingegeben werden. Es gibt ein Maximallimit von 10.000, welches insb. für große Verlage wie Springer relevant ist

Anzahl der Treffer: 604 (604 angezeigt) .

ISBN search possible

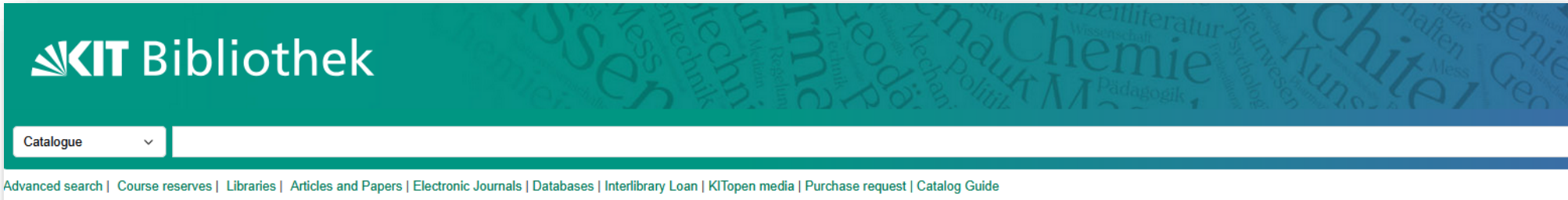
Zeilen pro Seite: 20

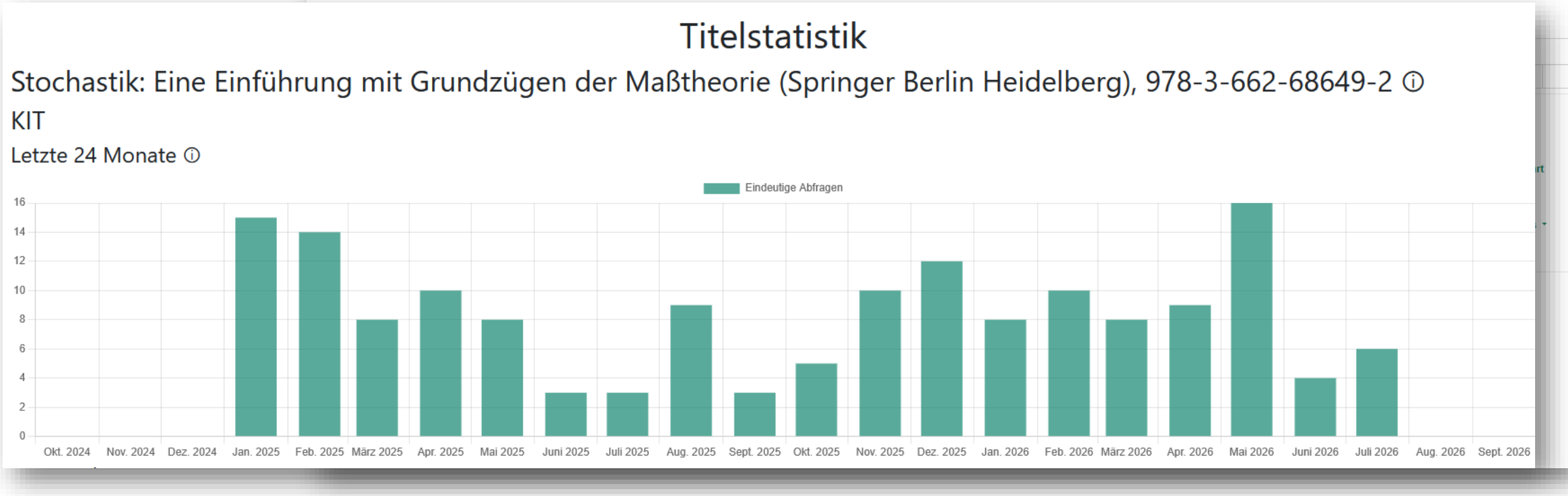
<< < 1 2 3 ... 31 > >>

Jahr	Provider ID	Data Provider Name	HS	Title	EJH	ISBN	DOI	Gesamtzugriffe
2025	154	Springer (+Nature, + Materials) KIT	KIT	Marketingmanagement	2020	978-3-658-29636-0	10.1007/978-3-658-29636-0	189
2025	154	Springer (+Nature, + Materials) KIT	KIT	Grundlagen des Marketingmanagements	2020	978-3-658-29638-4	10.1007/978-3-658-29638-4	84
2025	154	Springer (+Nature, + Materials) KIT	KIT	Handbuch Social-Media-Marketing	2024	978-3-658-45784-6	10.1007/978-3-658-45784-6	28
2025	154	Springer (+Nature, + Materials) KIT	KIT	Handbuch Social-Media-Marketing	2024	978-3-658-42282-0	10.1007/978-3-658-42282-0	27
2025	154	Springer (+Nature, + Materials) KIT	KIT	Digital Marketing	2024	978-3-031-69518-6	10.1007/978-3-031-69518-6	24
2025	154	Springer (+Nature, + Materials) KIT	KIT	Marketing	2024	978-3-658-41755-0	10.1007/978-3-658-41755-0	24
2025	154	Springer (+Nature, + Materials) KIT	KIT	Generative Künstliche Intelligenz in Marketing und Sales	2024	978-3-658-45132-5	10.1007/978-3-658-45132-5	23
2025	154	Springer (+Nature, + Materials) KIT	KIT	Influencer Marketing	2021	978-3-658-31892-5	10.1007/978-3-658-31892-5	22
2025	154	Springer (+Nature, + Materials) KIT	KIT	Marketingkommunikation mit der Generation Z	2020	978-3-658-30822-3	10.1007/978-3-658-30822-3	20

eUsage

Integration of title statistic in OPAC search:





eUsage

Regular maintenance of data providers neccessary for uninterrupted processes

Reports using harvested data for

- generating total numbers for several DBS (German Library Statistic) fields
- data analysis and maintenance purposes

Data Provider ID	Data Provider Name	HS	Gesamtzugriffe
300	ACM Digital Library HKA	HKA	1807
5	ACM Digital Library KIT	KIT	121634
97	Allen Press/Meridian KIT	KIT	11
46	American Association for Cancer Research (AACR) KIT	KIT	49
234	American Chemical Society (ACS) DHBW	DHBW	87
15	American Chemical Society (ACS) HKA	HKA	37
47	American Chemical Society (ACS) KIT	KIT	233656
48	American Economic Association (AEA) KIT	KIT	1057
231	American Institute of Aeronautics and Astronautics (AIAA) DHBW	DHBW	1
16	American Institute of Aeronautics and Astronautics (AIAA) HKA	HKA	12
49	American Institute of Aeronautics and Astronautics (AIAA) KIT	KIT	547
235	American Institute of Physics (AIP) (+ Scitation) DHBW	DHBW	8
50	American Institute of Physics (AIP) (+ Scitation) KIT	KIT	28987
210	American Institute of Physics (AIP) (+Scitation) HKA	HKA	71
52	American Mathematical Society (AMS) KIT	KIT	8741
53	American Meteorolgical Society (AMS) KIT	KIT	2216
55	American Physical Society (APS) KIT	KIT	64268
56	American Physiological Society (APS) KIT	KIT	138
57	American Society for Microbiology (ASM) KIT	KIT	720
58	American Society for Testing and Materials (ASTM) KIT	KIT	13

Working with Koha ERM

A lot of work, time and effort to get to where we are now…

Usability in everyday use:

- **gateway** for all searches
- time-saving, highly efficient
- less unplanned workload peaks
- reduced manual steps due to automated processes (e.g. harvesting, eHoldings)
- integration of COUNTER API
- interconnection of title, package, agreement, order, etc.

Working with Koha ERM

Final conclusion:

We create local interim solutions wherever necessary for our work that are fully functional until a final solution is developed for the core.

Bonus:

We can already actively work with the system and insert our data as we go.

Next Steps & Improvements

Several Plugins in our GitLab Repository https://gitlab.com/kit-library

For Koha Version 24.11 or higher

koha-plugin-create-erm-tab-in-catalog-details

→ Creates the ERM Tab on the Biblio Details page (Bug 37502 , Thanks Adolfo!)

koha-plugin-link-erm-basket

→ Creates Links from the Agreement Details page to basket(s) by using the basketnumber(s) in the defined additional field

koha-plugin-show-acq-basket-erm-agreement

→ companion plugin, displays all linked ERM agreements on the basket details page

Next Steps & Improvements

Plugin https://gitlab.com/kit-library/koha-plugin-erm-harvesting-management

for the full automation of the harvesting process, including retry management for processes that require a second run.

The plugin generates a new database table for this purpose!

Next Steps:

→ Bring this functionality into the Koha Core

We are already in contact with developers to lay the groundwork for this

- Changes in the database schema to store additional information
- Migration of existing entries
- Adjust logic to split date ranges into months

Further information (in German)

- Michaela Sieber, Katrin Fischer (2026): Datenflüsse für elektronische Medien – Einfach gemacht. https://nbn-resolving.org/urn:nbn:de:0290-opus4-202220 (18.09.2026)
- Michaela Sieber, Clemens Tubach (12.08.2026): Koha an der KIT-Bibliothek: Erfahrungen und Fazit nach 2,5 Jahren im Produktivbetrieb. ABI Technik, 2026, Band 46, Heft 3, S. 218-225 https://www.degruyterbrill.com/de/journal/key/abitech/46/3/html

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