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MAKING DO: ERM ALTERNATIVES

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ABSTRACT

This paper discusses alternatives to a full-featured commercial ERM as presented at the 2010 Charleston Conference. Some libraries do not have funds or expertise to purchase a full-featured commercial ERM, but still require ERM functionality. At Ferris State University (FSU), librarian/programmers are developing OLLARA (Online License Locator and Resource Administrator), an open-source ERM based on the ERMES Electronic Resource Management System (http://murphylibrary.uwlax.edu/erm/ERMesLicensev.2010.05.pdf). The initial release includes a problem reporting system, information about usage rights, and a repository for usage statistics. At Saginaw Valley State University (SVSU), librarians are creatively using existing tools to track information and make it accessible to all library staff.

INTRODUCTION

As electronic resources become a larger part of library collections, libraries of all sizes are utilizing Electronic Resource Management systems (ERMs) to manage electronic resources. Many academic libraries purchase these systems to assist in managing electronic resources. Full-featured commercial ERMs, built and marketed by ILS vendors, are expensive and require annual maintenance fees. There is also often a long startup time and a lot of work and expertise can be required to load library data into the system. “Lite” ERMs have been developed by subscription vendors, such as Ebsco (EBSCONET ERM Essentials, see http://www2.ebsco.com/en-us/ProductsServices/ERM/Pages/index.aspx) and Swets (ERM as a Service, see http://www.swets.com/upload/11317092_672_1277456460797-ERMasaService_4page-web-06.10.pdf) and provide some of the functions of a full-featured commercial ERM. These programs may have no initial cost for customers but there is an annual subscription fee and they may also keep a customer tied to a specific serials vendor.

The presenters of this session, both from smaller, state-supported universities in Michigan, require ERM functionality, but both have found it difficult to justify the cost of a full-featured commercial ERM. FSU has chosen a locally-created technical solution, while SVSU is making creative use of existing functionality. These are solutions that are available to other libraries with limited resources. This paper will discuss the methods used at FSU and SVSU that staff from other libraries might consider using to track resources and make information available more broadly throughout their home library.

Ferris State University - OLLARA

At Ferris State University, librarians looked at full-service and “lite” ERMs solutions. Members of the library Electronic Resources Group saw a reference to a freely-distributed solution created at the University of Wisconsin-La Crosse, which uses Microsoft Access, and believed it could be adapted for use at FSU. The FSU librarians rewrote the system in PHP and MySQL to make it open source. OLLARA is available for download at http://ollara.ferris.edu/.

Release 1 of OLLARA provides significant functionality, including: problem reporting, uploading and retrieving usage statistics and license information, and providing a common place to store resource and vendor information such as administrative login information and the URL for the title list of a journal package. Only top level (databases, journal packages) resources are handled in the current release, but future releases will include title lists, and there are plans for automatic uploading of information from
In FSU library operations, the problem reporting feature is well used. Anyone in the library can create a “Guest” account which allows them to report a problem. Problem reports include the name of the person reporting the problem and are date stamped. E-mail problem alerts are sent to the Automation Librarian, the Collection Development & Acquisitions Librarian, and to the Technical Services Specialist who maintains the SFX Knowledge base and all e-journal access. A list of problems is kept in OLLARA, and these can be sorted by date, or a librarian can choose to retrieve only unresolved problems.

The problem reporting feature allows all library staff to report problems in a consistent way. It eliminates the need for library staff to guess whom to report the problem to, and it makes it less likely that problem information will get lost in a big pile of e-mail. It also provides a record that can be used to document the history of problems with a resource and makes it easier for information to get back to the person reporting the problem; they can look up the problem and see the resolution. It helps eliminate duplicate problem reports; staff are encouraged to check the problem list before they report a problem to see if it has already been reported.

Another useful feature is license information. Licenses are made available, if possible, either through uploading the license or through providing a URL to the license on the vendor’s web page or on FSU’s Consortium’s web page. In addition, the license information screen provides a place to put the values of the most important ERMI fields so that this information can be readily available to ILL staff, Reserves staff, and others who might need it.
OLLARA is a work in progress, and development work competes with other library activities. Initial data entry included information about database and journal package subscriptions, key vendors, and at least 2009 usage statistics and payment information. Future data entry will probably require automatic solutions to be built.

SAGINAW VALLEY STATE UNIVERSITY – EXISTING RESOURCES

When it become evident that funds would not be available for a commercial ERM, librarians at SVSU began discussing other options they might use to record and track electronic resource information and usage. While they gathered information on and discussed the possibility of working with one of the open access system currently available, it quickly became evident that the library did not have the staff necessary to do this. In addition, previous experience in collaborative projects with the university’s IT department suggested that this project would be difficult to complete in a timely fashion given the size and scope of the project and various initiatives underway in both departments. Staff continued to work with their existing hodgepodge of methods.

In 2009, the library acquired LibGuides, a popular tool for creating library subject guides. Since SVSU did not use an intranet, and had been unsuccessful with previous attempts at maintaining staff wikis, librarians found themselves using LibGuides not just for traditional subject guides, but also for compiling various staff information and hosting data for review by faculty. As staff became more familiar with the benefits and limitations of using LibGuides in this way, the idea for an ERM-like tool began to surface. The presenter began experimenting with possibilities in LibGuides, and created a guide called “Zahnow Library Electronic Subscription Information Guide.” The guide is organized in tabs by vendor; under each vendor tab, separate boxes for each product the library subscribes to from this vendor is available. General and contact information, statistics, reserve and ILL rights, and cost/use data is compiled and made available for each product.
The current LibGuide is not an ideal solution for a library that might eventually transition to a formal ERM, as it does not allow for the creation of fixed fields and integration of ERM1 elements. Information must be hand-keyed, and there is no way to use LibGuides to format the information for loading into another system. However, it does provide a platform for compiling vendor information and making documents with statistics and licensing information available in a way that is available to all library staff. The comments option allows guide users to share information with one another, and to report and track problems with a particular vendor or product.

Staff have had some discussion at SVSU about whether to use LibGuides to keep track of account passwords. While there are differing opinions, the presenter has chosen not to include this information in the LibGuide, as the security of a LibGuide cannot be guaranteed. Further, direct links to licenses that are available at another password-protected site are not available here; licenses are saved in separate files in RTF or PDF format and this document is then linked to the LibGuide.

Use of LibGuides also requires a tremendous amount of work on the part of the guide owner, in that information cannot be automatically uploaded and must be entered and maintained by hand. There is wide room for error, as some information is created originally, and must be hand-keyed. To create the original LibGuide, SVSU staff were fortunate to have the services of an intern from a local university library school. This intern did the majority of the initial page creation under the guidance of the presenter; ongoing maintenance will be continued by the library’s Periodicals Assistant.

While LibGuides provides the primary collaborative piece of SVSU’s project, it does not provide a feature that has become invaluable for staying ahead of renewal deadlines – it cannot send alerts to users. The library’s Acquisitions Assistant has an extensive paper method of keeping track of renewal and payment deadlines, and some vendors provide email alerts for their products. However, the paper option does not meet the requirements that alerts be automated and monitored by multiple staff, and while we appreciate help vendors may give in this area, it is not a substitute for our own work.

As a library that uses the Innovative ILS product, SVSU does have another method for sending alerts. In a recent Innovative Millennium upgrade, alert functionality was included in the Serials and acquisitions models. This option is easily activated with an email to Innovative service staff. Once in place, it adds the option to create a “tickler” field in any serial or order record.
This field allows the user to enter a date, brief message and an email address for the alert. On the date specified, the alert language will be sent to the email address entered in the tickler. Multiple email addresses may be entered in the “send to” field, so that alerts may be sent to multiple staff people.

The solutions provided here are just two that other libraries might explore – while they have not been a perfect solution for SVSU, it has provided some of the elements needed, and has forced to staff to think more broadly about how a project might be accomplished.

During the course of creating the LibGuide, it became more obvious to administrative staff that keeping information in this way was time-intensive and not cost-effective; it was also easy for the Guide to become out-of-date if staff were too busy to enter regular updates. Further, while it provided for the minimum needs, despite the staff-time required in creating and maintaining the LibGuide, it could only provide basic information, and was not useful for the advanced reports needed for ACRL and NCES, nor did it provide any method for data analysis. In June 2010, the presenter had the opportunity to provide potential goals and initiatives for inclusion in the library’s planning and budget document which is required by the university’s Academic Affairs administration the spring of each academic year. The presenter included an initiative to select, purchase, and implement an ERM. This initiative was selected by the library director for inclusion in the document; the director also requested one-time funds, separate from the library’s acquisitions budget, to facilitate this project. In September of 2010, library staff learned that this initiative had been approved, with the additional funds requested, by the university Provost. An ERM selection committee is currently working to identify potential ERM providers, and expects to select and purchase a system by March, 2011. While staff have arrived at this destination later than they may have wished, they feel that they have learned a lot in the process, and making this transition later than some libraries will allow them to learn from colleagues and take advantage of continuous improvements made by vendors since ERM products first entered the marketplace.

CONCLUSION

As libraries’ electronic collections continue to increase, managing electronic resources remains a challenge. Major vendor solutions provide one road, but local solutions provide another. Local solutions can more directly target local issues, and may provide inexpensive solutions, particularly when only partial solutions are required. The challenge of maintaining information about and access to electronic resources is a constant for libraries, and provides the opportunity for creative solutions.