2010

Under the Hood -- Buy, Build, or Borrow

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Recommended Citation

DOI: http://dx.doi.org/10.7771/2380-176X.5522

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re we still talking about ERMS? I was surprised when attending the recent Electronic Resources & Libraries Conference how much talk there still was about Electronic Resource Management Systems (ERMS). It’s not the same discussion, though. After years of presentations on the frustrations of data entry into ERMS and the lack of interoperability with other software programs, the discussion has started to change from “how do we get all our data into our ERMS?” to “how can we gain the same kind of functionality from other tools?” What if, instead of buying an ERMS product, we build just the functions we need? Or borrow the work of others?

There are certain e-resource tasks that need to be accomplished and not all of them can be effectively done through an ERMS. Sometimes the answer might be another commercial product that can pick up one of the tasks needed for e-resource management. My department desperately needed e-resource purchasing; we had trouble knowing where a new resource was in the purchase process and making sure that it progressed smoothly and making sure that it progressed smoothly through the acquisition cycle from selection to access. Our ILS could not help; we did not see an ERMS available that could function as a tracking system for purchases. So we borrowed a solution, adapting helpdesk software licensed by another department to manage our new electronic purchases.

Another path is building your own solution. One of the best examples I’ve seen recently was at the Electronic Resources & Libraries Conference when Ben Hect and Robin Malott from the University of Notre Dame presented CORAL (Centralized Online Resources Acquisitions and Licensing). Their team, including Andy Langhurst, has built an e-resource management product from scratch, module-by-module as the need arose in their department. They started with fund reporting and usage statistics modules and moved to licensing, as they could not find a commercial solution that fit their requirements. For institutions like Notre Dame, the discussion is first what do we need and then how can we build it? Part of building something from scratch is taking a hard look at what functions your library needs, rather than taking a commercial system and adapting your processes to it.

We don’t have to build a product that imitates the commercial offerings, we can create the features and functions we need in ways that suit our workflow. For example, one of the major issues with implementing a commercial ERMS is how it will integrate with your ILS. Does it integrate seamlessly or do you need to port data back and forth? For a homegrown product, this may not be an issue. It won’t integrate with your ILS and you don’t expect it to. Yes, your staff may need to learn multiple interfaces, but it is not just e-resource management that is making this necessary. As purchasing is increasingly done in vendor-provided systems and even print acquisitions require significant Internet searching, library staff are being pushed to move through different interfaces and software products to accomplish their tasks.

Manual data entry has also been a major concern with commercial ERMS products. Conference presentations in the last few years have often discussed how to streamline the heavy load of data entry and what staffing is needed to populate an ERMS. Much of the need for data entry in an ERMS product is centered on the software being a storage place for information. This is always problematic because we have long considered the ILS to be the database of record for purchasing and, unless these two products really do integrate seamlessly, we find ourselves with two competing sources of information. What if our ERMS are instead a point of need solution for competing sources of information. What if our ERMS are instead a point of need solution for competing sources of information. What if our ERMS are instead a point of need solution for competing sources of information. What if our ERMS are instead a point of need solution for competing sources of information.
from librarians who wrote about their experiences with implementing an ERM. Librarians such as Kristine Condie and Nancy Beals explained why they chose a particular ERM, highlighting both benefits and drawbacks during their implementation process. I was intrigued by the experiences their respective libraries encountered while attempting to hit their “moving target” to make e-resource management easier.

After meeting Katina Strauch, editor of Against the Grain, at the Charleston Conference in fall 2009, we discussed an idea for an article on ERMs. From my earliest days at MetaPress, the division at EBSCO that hosts scholarly publisher content, I became passionate about helping to solve e-resource problems as I communicated daily with numerous librarians about access and linking problems. I want to continue the conversation about how to make e-resource management more efficient — how to simplify librarians’ daily tasks with e-resource management. In response, Katina asked if I would be interested in pulling together a special issue detailing librarians’ experiences with ERMs. In this special issue, we try to gauge the current state of ERMs in today’s libraries.

The articles explore a range of different ERM systems, focusing how the ERM helps the library address common problems with e-resource management. As I contacted nearly every librarian I know, I heard from many that they’re either in the early process of selecting an ERM or they’ve not truly implemented their purchased ERM. I contacted librarians I met at the Charleston Conference, such as Susan Klimley, Columbia University Health Sciences Library, who writes about implementing the Serials Solutions 360 Suite; and Ryan Weir, Murray State University, who argues for implementing an ERM at a small to medium university library. I also contacted Nancy Beals, who authored one of the first articles I read on selecting and implementing an ERM system; she agreed to write a follow-up article about her library’s experiences with the Innovative Interfaces ERM.

In addition to a range of librarian perspectives, it is important to represent publishers and vendors — they also play an essential part in the evolution of ERMs. Heather Staines from Springer agreed to pull together an overview of how publishers can help librarians support ERMs and standardize data for e-resources. Oliver Pesch from EBSCO presents an overview of how ERM Essentials takes the next step in ERM technology by providing pre-populated data from a customer’s order history.

As a writer with an M.A. in English, my guest-editorship was lacking one essential element: an M.L.S. I contacted Elizabeth “Liz” Lorbeer, a medical librarian at Lister Hill Library of the Health Sciences at the University of Alabama Birmingham (UAB), and asked her to co-edit this special issue with me. I needed an expert eye to weigh in on the articles and serve as a librarian e-expert. I met Liz years ago while working at MetaPress; she is one of those librarians with whom I phone countless times, typically about issues related to SpringerLink, MetaPress’s largest publisher-partner. She remembered me as being eager to help. I remembered her as being one of those really smart librarians who fully understands e-resources. We collaborated with the goal of providing to the library community the best possible ERM information.

One final piece of our ERM information puzzle was missing: an overview of current ERM trends. While we were able to gather an array of articles about ERMs, we still didn’t have a true, broad picture of ERM issues and problems that librarians are dealing with in 2010. Katina suggested that EBSCO assist Against the Grain with creating a survey to poll subscriber librarians. We created a survey that attempted to target any hot-button issues with ERMs by first gaining an understanding of how ERMs are being used. We asked questions about the tools librarians are using to manage their e-resources, how often the library staff uses the ERM system and what type of e-resources the library offers to users. After gathering data about how ERMs are being used, we asked librarians a series of attitudinal and ranking questions to determine various levels of satisfaction with the ERM’s functionality and features, whether or not the ERM offers management of necessary areas such as the ability to manage e-journal packages and workflows, and how important various ERM features are to librarians.

From the librarians who responded to the survey, ERM usage trends in today’s libraries emerged. This special issue offers an article that discusses these findings quantitatively and qualitatively. One trend is clear: librarians want one system for all library processes. Additionally, librarians need help with populating their ERM in order to have truly effective e-resource management. On a positive note, librarians are pleased with the level of improvement that ERMs have brought to their e-resource management. It is always good to find a light at the end of the tunnel. As Beals explains in her article in this issue, “an ERM system is a living, ever-changing and growing entity that requires upkeep, attention and, above all, use.” Librarians understand this “ever-changing” and “growing” nature of ERMs; they are working with what they have and patiently waiting for the next evolution that will help them hit the e-resources “moving target,” providing necessary “physical control” of this ever-changing information.

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**Endnotes**


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**Under the Hood**

archived as signed original paper documents, no matter if the terms are captured by an ERMS. Only a few of the terms within a license will ever need to be reexamined, so parsing the whole license for the terms and conditions may not be necessary. If there are three terms that a library finds relevant to day-to-day work, these terms can be captured in a separate e-resource management system, and the original document can serve as storage for the rest of the terms in case they are ever needed.

The Notre Dame team has taken this to heart, to the point that any license entered into CORAL can include as many or as few terms as are considered necessary for interpreting the document. After finding that the product they built really did satisfy their internal e-resource management needs, the Notre Dame team is releasing the licensing software to other libraries under the GNU GPL open source license (See http://www.library.nd.edu/eresources/downloads/ for more information). With the GNU GPL license, not only does a library receive the benefit of Notre Dame’s work, but the ability to customize the product even further to fit particular needs. I plan to try it, since the next challenge for my department is how to make our e-resource licenses, currently languishing on shared server space, more accessible internally.

Is building it yourself the answer? Probably not for most of us, who don’t have the assistance of programmers. However, evaluating your library’s needs in relation to what commercial products offer is an important step before committing to any product. Maybe a newer ERMS will no longer require extensive manual data entry or maybe it will integrate perfectly with your ILS, but does it manage your information in a way that fits with your work? Do you need each bell and whistle, or would a simpler solution take your main weak points more effectively? Can you capitalize on other products available within your institution or on the work of colleagues at other institutions? Instead of building or buying, how about borrowing? 🎙️

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16 Against the Grain / April 2010 <http://www.against-the-grain.com>