Making Do: ERM Alternatives

Frances Rosen
Ferris State University, francesrosen@ferris.edu

Jennifer Dean
Saginaw Valley State University, deanjl@udmercy.edu

Follow this and additional works at: <https://docs.lib.purdue.edu/charleston>

An indexed, print copy of the Proceedings is also available for purchase at:

<http://www.thepress.purdue.edu/series/charleston>.

You may also be interested in the new series, Charleston Insights in Library, Archival, and Information Sciences. Find out more at: <http://www.thepress.purdue.edu/series/charleston-insights-library-archival-and-information-sciences>.

Frances Rosen and Jennifer Dean, "Making Do: ERM Alternatives" (2010). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284314858>

This document has been made available through Purdue e-Pubs, a service of the Purdue University Libraries. Please contact epubs@purdue.edu for additional information.

MAKING DO: ERM ALTERNATIVES

Fran Rosen, (francesrosen@ferris.edu) *Acquisitions and Collection Development Librarian, Ferris State University*

Jennifer Dean, (jidean@svsu.edu) *Head of Collection Development and Acquisitions, Saginaw Valley State University*

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

the ILS and from the SFX Knowledge base.

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.

OLLARA

[Logout](#)
[Return to main menu](#)

Select problem by:

- ☐ Resource name
- ☒ Date (newest first)
- ☐ First line of problem
- ☐ Unresolved only

2010-10-28 18:30:19	Access Pharmacy
2010-10-28 13:17:23	Wilson Abstracts & Indexes
2010-10-26 16:21:14	CINAHL
2010-10-25 13:01:19	Access Pharmacy
2010-10-18 12:37:46	Visionet
2010-10-13 16:01:11	Visionet
2010-10-12 10:23:16	Stat-USA
2010-10-08 08:10:18	Criminal Justice Periodicals Index
2010-10-07 18:13:31	Michigana (Sabin Collection): Sources
2010-09-30 22:15:16	Access Pharmacy
2010-09-26 15:43:58	Access Medicine
2010-09-17 15:32:01	Cochrane Library
2010-09-17 14:16:10	Cochrane Library
2010-09-03 09:08:16	Mergent Online
2010-08-30 09:07:38	Access Pharmacy

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.

Resource name:

ACM Digital Library

Vendor:

ACM

Bib. No. (from your online catalog):

b14755038

User limits:

none

Sharing Rights**Print Copy:**

Permitted (explicit)

Interlibrary Loan Print or Fax:

Permitted (explicit)

Interlibrary Loan Electronic:

Permitted (interpreted)

Course Reserve Print:

Permitted (interpreted)

Post-subscription access rights:

Yes, see license for details

Scholarly Sharing:

Silent (uninterpreted)

Interlibrary Loan Secure Electronic Transmission:

Permitted (interpreted)

Electronic Link:

Silent (uninterpreted)

Course Reserve Electronic:

Permitted (interpreted)

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 became 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.

SAGINAW VALLEY STATE UNIVERSITY **ZAHNOW LIBRARY**

Library Home » Zahnow Library Subject Guides Home » Zahnow Library Electronic Subscription Information Guide

Zahnow Library Electronic Subscription Information Guide Tags:

Usage statistics and license information for Zahnow library electronic resources

Last update: Aug 27th, 2010 URL: <http://librarysubjectguides.svsu.edu/stats>

Welcome CQ Press ProQuest

Welcome Comments (0) | Disable Comments

About this LibGuide

This LibGuide is intended to be a clearinghouse of information for SVSU staff about the SVSU library's electronic subscriptions. It will be updated regularly as new statistics are reported and as licenses change. Changes in subscriptions will also be noted. Staff may especially wish to refer to this page to view statistics when renewals are announced, or to verify license provisions for reserve or interlibrary loan.

Due to legal restrictions, passwords will not be available at this site. However, in many cases, the statistics provided here will only be a portion of those that are available at the vendor's own statistics site. If you wish to view additional statistics, please contact Beth or Jennifer for access information.

(edit text) Comments (0) | Disable Comments

Definitions

Counter - COUNTER (Counting Online Usage of Networked Electronic Resources) is an international initiative serving librarians, publishers and intermediaries by setting standards that facilitate the recording and reporting of online usage statistics in a consistent, credible and compatible way. (Taken from the COUNTER website on 8/27/10; see <http://www.projectcounter.org/about.html> for more information.)

SUSHI - The Standardized Usage Statistics Harvesting Initiative (SUSHI) Protocol standard (ANSI/NISO Z39.93-2007) defines an automated request and response model for the harvesting of electronic resource usage data utilizing a Web services framework. (Taken from the NISO website on 8/27/10; see <http://www.niso.org/workrooms/sushi> for more information.)

(edit text) Comments (0) | Disable Comments

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 ERMI 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.