

November 2013

Innovations Affecting Us -- A Home-Grown License Manager: Is It For Your Library?

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Recommended Citation

DeVoe, Kristen (2007) "Innovations Affecting Us -- A Home-Grown License Manager: Is It For Your Library?," *Against the Grain*: Vol. 19: Iss. 3, Article 40.

DOI: <https://doi.org/10.7771/2380-176X.5397>

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Innovations Affecting Us — A Home-Grown License Manager: Is It For Your Library?

Column Editor: **Kristen DeVoe** (Electronic Resources Librarian, College of Charleston) <devoek@cofc.edu>

Column Editor's Note: *As electronic journal collections grow, more and more libraries are implementing electronic resources management systems in an effort to organize the processes of managing electronic resource related functions such as selection, license management, renewal and cancellation, and providing access. There are a variety of commercial systems available as well as many instances of locally developed systems designed to streamline electronic resource management functions. The process of selecting or developing and then implementing these systems is often a challenge requiring large commitments from library staff.*

This month, **Innovations Affecting Us** is fortunate to be guest edited by **Natalee Hattig**, Electronic Resources Collection Management Librarian, **Florida State University Libraries** <nhattig@mailers.fsu.edu>. **Natalee** was involved with the design and implementation of a home-grown license manager at **Florida State University Libraries**. In this issue, **Natalee** shares with readers her experiences with this implementation and provides insight into the design and planning processes. Hopefully, reading about **Natalee's** experience at **FSU** will answer some questions that readers may have about home-grown electronic resource management systems. —**KD**

Those dealing with electronic resources know this environment has many gray areas and that centralizing documentation is often a challenge. Many may be able to relate to the challenge of electronic resources documentation changing many different hands as well as the challenge of where the physical paper trail for these resources resides. It seems that "going paperless" is a notion we can dream about but we still cannot completely escape from the paper trail.

At **Florida State University Libraries**, we have designed a home-grown license manager which houses paperwork electronically in an attempt to centralize electronic resources documentation. As a supplement to our vendor-based Electronic Resource Management System (ERMS), the license manager allows for the scanning of all our electronic resource documentation into an electronic format that replaces the paper trail that has traditionally been filed in a cabinet.

This home-grown license manager supports information accessibility for Electronic Resources, and also acts as a contact point for many different departments within the library who need licensing and other information. These departments include Interlibrary Loan, Electronic Reserves, and Collection Development. Having this information available electronically allows authorized users to access this information through a general username and password and provides greater inter-de-

partmental accessibility than was possible in the past. Since the license manager resides on a local server, changes can be uploaded and take effect immediately.

Collection Development can use a license-manager to view terms of the license in order to determine how many concurrent users there are, if interlibrary loan is permitted, when the resource subscription begins and ends, and any other pertinent information that would contribute to and factor into collection decision making. Since this tool was created locally, one can customize it to include whatever is needed by Collection Development or other library departments in need of license agreements and other electronic resource financial information. The license manager can also be customized to house statistics or other analyses, and can also house titles lists that can help to identify overlap of existing journals.

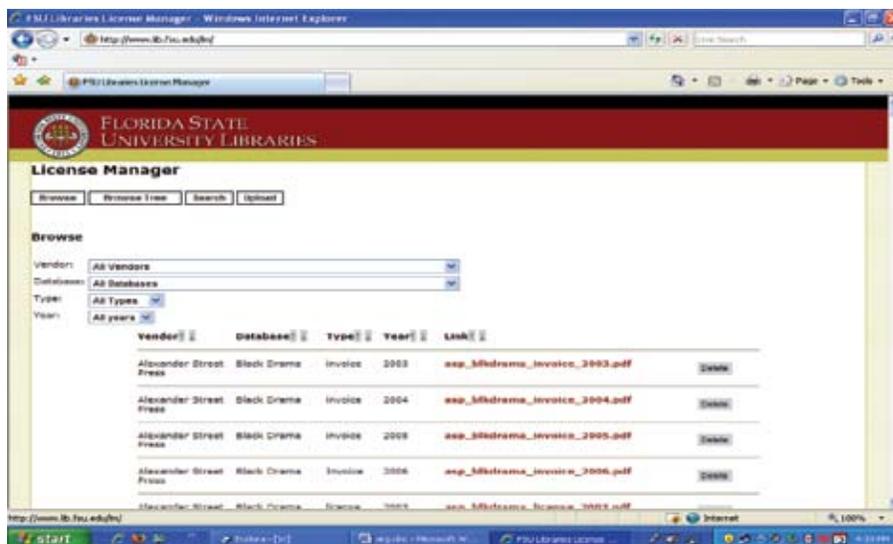
Libraries often have different goals and priorities but many libraries face similar issues. Unfortunately, budgets are often cut or remain static, which places an even greater emphasis on using available funds wisely. If a library is experiencing a tough financial year, Collection Development can use the license manager to review licensing details to determine either to renew or discontinue the resource. Since budgets typically do not allow libraries to purchase or subscribe to every resource that is needed, Collection Development plays a crucial role to ensure that the library spends its collection budget wisely.

Initially, implementing a license-manager is time-consuming. While it takes less time to

measures of storage for paperwork. Since **Florida State University** is geographically located in an area where natural disasters are not uncommon, this tool also serves as an alternative to traditional methods of documentation storage. Although one can get all the necessary copies of the licenses and other paperwork from vendors this process is also time-consuming and would not provide the additional secure measure of paperwork.

In order to create a license manager, all documentation needs to be gathered together in one area so that the paperwork is centralized and organized for scanning. For a more effective implementation of the license-manager, **FSU** constructed a consistent naming scheme that organized the licenses, titles lists, invoices or other relevant documentation after the paperwork was scanned. This naming scheme provides a guideline and an existing template for those adding new documentation to ensure consistency.

The naming scheme identified the vendor, resource, documentation type and year so that when searching the license manager, the entries are grouped by vendor, subsequently by resource and then type, and finally by group. For instance, if you were searching for an invoice for the vendor **Alexander Street Press** and for the database **Black Drama**, one could either search all the **Alexander Street Press** entries or you could just go to the drop-down menu for database and choose **Black Drama**. A naming scheme for the file may look like `asp_blkdrama_invoice_2006.pdf` (See figure 1 below).



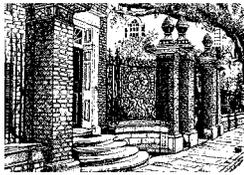
physically file the documentation in a cabinet, that method does not allow for the easy accessibility that the electronic format of the license manager provides. However, it will save time in the long run and provides additional secure

The license manager can be searched either alphabetically by vendor, or by resource, type of documentation, or the year of documentation. Sometimes just searching vendor may be

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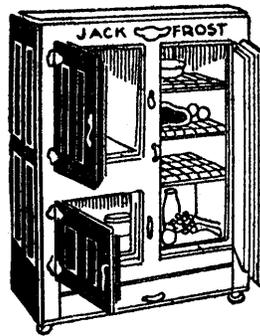
Name _____ Title _____
Organization _____
Address _____
City/State/Zip _____
Phone _____ Fax _____
Email _____ Signature _____

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tricky as you potentially could have multiple databases for one vendor so by having the option to limit a search by the different choices can often narrow the results.

A benefit of creating and maintaining a home-grown license manager is that users can change the structure and contents at any time without needing to upgrade or invest a lot of money. FSU's license manager was created using the open content management system, **Drupal**, so no additional money was spent to create this tool. However, you really need to consider what skill set is needed both to start an implementation and maintain a resource such as this. Currently, you may have the staff who can perform duties such as this but that does not always mean you will have someone in-house to rely on.

Is a project like this worth either your time and effort or your staff's time? One really needs to think objectively about what purpose(s) a license manager would serve and who would use it. Those dealing in Electronic Resources often work closely with Collection Development in acquiring new resources and deciding if it is worth keeping a particular resource when



the subscription is due. Electronic Resources and Collection Development Departments often have strong ties due to the nature of their work and this is a tool that encourages cooperation and coordination. As mentioned, the Electronic Resources unit at FSU is responsible for maintaining the license manager, but

Collection Management also has a use for a tool such as this. While, it initially may be a lot of work to gather all the paperwork, coordinate everyone's efforts for implementation, and decide who will maintain the tool, having all your documentation stored electronically in an orderly fashion encourages collaboration and saves time in the long run. 🌱

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the logarithmic representation of the distribution of sales or usage for any product; the other two are the "Short Head" (the most interesting) and the "Excluded Middle," whose loss is the "Long Tail's" gain. "Long Tail" marketing makes it possible for even the most specialized works to find some readers; and since so much of scholarship is highly specialized, the "Long Tail" is a good fit. What gets overlooked, however, is that even as access to the "Long Tail" grows (that is, more titles find readers), the small number of titles with the most readers gets even more readers: the rich get richer. This is why more and more scientists want to get published in *Nature* and why we all want to send our kids to **Harvard** and **Yale**. 🌱

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and Marketing at **The Rosen Publishing Group** in New York. A new database which **Miriam** has been involved with — **Teen Health and Wellness** — has been favorably reviewed recently in *The Charleston Advisor*, *Library Journal*, and *Booklist* to name a few. Check it out!
www.teenhealthandwellness.com

The number of libraries participating in the **Google Book Search Project** just got bigger with the addition of the **Committee on Institutional Cooperation (CIC)**.
www.cic.org

We're running out of space but not before we welcome **Christine Fischer** (Head of Acquisitions, Jackson Library, **UNC-G**) <christine_fischer@uncg.edu> as our new editor of **Group Therapy**, see this issue, p.79! Welcome, Christine! 🌱