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## Under the Hood -- Buy, Build, or Borrow

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## Notes of the life of James Galbraith

by **Scott A. Smith** (Alibris) <scott.alan.smith@comcast.net>

In April of this year it was my sad duty to report the death of a dear and longtime friend and colleague, **James Galbraith**. At the time I agreed to post news of this in several places, but given time constraints did so with some brevity. I also agreed to write a more substantive account of his life for subsequent publication; it is with a profound mixture of sadness at his passing and thankfulness to have been counted among his many, many friends that I offer the following.

**Jamie** was born in the village of Brevig on the Isle of Barra, in the Western Isles of Scotland, on 12. May 1942. His family later moved to the town of Castlebay on Barra. He graduated from **Strathclyde University**, and began his library career at the **Dunfermline Public Library**. While there he also taught Gaelic at **Lauder College**. He served at **Newcastle-under-Lyme** as well, and taught in the library program at **Stoke**.

He moved to Canada in 1968, and served as Chief Librarian in St. John's, Newfoundland, and Moose Jaw, Saskatchewan. In later life he recalled his time in Newfoundland and on the prairie with great fondness.

In 1972 **Jamie** joined the staff of **Blackwell's** and worked for the firm in a variety of capacities for the next thirty years, both in the UK and in North America.

**Jamie** retired initially to Barra in the 1990s, but returned to Canada and spent his last years in Nova Scotia. He died on the 31. March, 2010 in Liverpool.

**Jamie** was deservedly known as a bookman extraordinaire; he well knew the location of every independent and secondhand bookshop worth noting in the UK, Canada, and the USA. (He was one of very few to be excused Otto Penzler's ban on drink in the shop.) His collection of crime novels and sea stories was likely unsurpassed in Canada.

There's the danger of being regarded as trite to say that **Jamie** was an icon in the library world, but he was indeed just that. Generations of librarians regarded him with affection, and **Jamie** stories abound. The late R. Miles Blackwell often remarked that **Jamie** was one of the best librarians and booksellers he ever knew, and that **James** was happiest "when he surveyed (or caused) utter disaster".

In November 1995 I embarked on an oral history project of **Blackwell** staff, both from the UK side of the house and from **Blackwell North America**. **Jamie** was the first to be interviewed for the **Blackwell Oral History Project**; we have four hours of his marvelous voice recalling his remarkable life.

He leaves to mourn friends without number; his children **Ewen** and **Stephanie** (both librarians); his daughter-in-law **Thomasina**; a wee granddaughter **Quinn**; and his companion of many years, **Eileen Heaslip**. He will not be soon forgotten. 

## Under the Hood — Buy, Build, or Borrow

Column Editor: **Xan Arch** (Electronic Resources and Technology Librarian, Stanford University Libraries, Stanford, CA 94305-6004; Phone: 650-725-1122; Fax: 650-723-4775) <xanadu@stanford.edu>

**A**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?

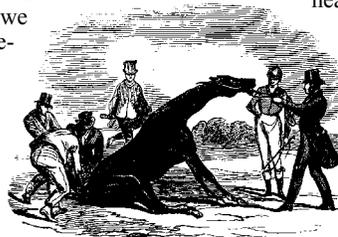
There are certain e-resource tasks that need to be accomplished and not all of them can be effectively done through an ERMS. Sometimes the answer might be another commercial product that can pick up one of the tasks needed for e-resource management. My department desperately needed e-resource purchase tracking; we had trouble knowing where a new resource was in the purchase process 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 Heet** 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 information that is archived elsewhere? Most libraries require that their license agreements be



from librarians who wrote about their experiences with implementing an ERM. Librarians such as **Kristine Condic**<sup>3</sup> and **Nancy Beals**<sup>4</sup> 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 her ideal ERM; **George Stochakas**, **Indiana State University**, 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-guest edit this special issue with me. I needed an expert eye to weigh in on the articles and serve as a librarian e-resources expert. I met **Liz** years ago while working at **MetaPress**; she is one of those librarians with whom I’d spoken over the 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. 🌸

#### Endnotes

1. **Mitchell, Anne M.** “E is for Entropy: Electronic Resource Management Systems.” *The Serials Librarian*. 51 (2007): 31-37.
2. **Grogg, Jill E.** “Electronic Resource Management Systems in Practice.” *Theory & Practice*. 20 (2008): 86-89.
3. **Condic, Kristine.** “Uncharted Waters: ERM Implementation in a Medium-Sized Academic Library.” *Internet Reference Services Quarterly*. 13 (2008): 133-145.
4. **Beals, Nancy.** “Selecting and Implementing an ERMS at Wayne State University: A Case Study.” *Journal of Electronic Resources Librarianship*. 20 (2008): 62-69.

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](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 target 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? 🌸