

A Locally Created ERM : How and Why We Did It

Introduction

The University of Wisconsin – La Crosse’s Murphy Library provides access to approximately 200 subscription databases. As with many academic libraries, methods and tools for managing these resources were sorely needed. However, and also a familiar scenario, our budget has been cut repeatedly over the past few years, thus the possibility of purchasing a commercial electronic resource management system was a pipe dream at the very best.

Here, Murphy Library’s Systems Librarian, William Doering, and Electronic Resource Librarian, Galadriel Chilton, describe how Microsoft Access was used to develop a basic, effective, and inexpensive ERM that is freely available for others to use (<http://murphylibrary.uwlax.edu/erm/>).

Galadriel’s Need for an ERM

When I began working as the University of Wisconsin La Crosse’s Electronic Resources Librarian in 2003, the primary methods of managing the library’s database subscriptions included a file cabinet, a couple of static Intranet web pages, and binders. In the file cabinet were manila folders for each subscription. These folders typically contained a license agreement, correspondence, usage reports as well as user and administrator access information such as URLs, usernames and passwords. The Intranet pages included a list of all the resources, user limits and from where the subscription originated (local, consortium, etc.) while binders housed invoice copies and payment records.

Other than the few Intranet pages, the management of e-resources was paper-based. Not only did this limit my ability to generate reports, create projections, and work dynamically, but a paper-based system of e-resource management was also time consuming and severely limited distribution of information to colleagues and users.

Within a month, I had an easel in my office that I used to plan a “Database of Databases”; a relational Microsoft Access database that would facilitate significantly improved electronic resource management.

Then, in January 2004, I attended “Taming the Electronic Tiger: Effective Management of E-Resources” a day-long symposium at ALA Midwinter. During this session, the presenters spoke of how the time of creating home grown ERMs had passed as automation vendors were developing far more robust management systems; the message I interpreted was if you do not have an ERM now, do not take the time to create and populate one, wait and get a commercial ERM.

After attending “Taming the Tiger”, I continued adding to my list of desired attributes for an ERM, but put plans of creating an Access database on hold. Instead, I began contacting vendors who had or were developing ERMs. I attended webinars, requested pricing information, and also began monitoring listservs for posts by librarians who had begun to use commercial ERMs.

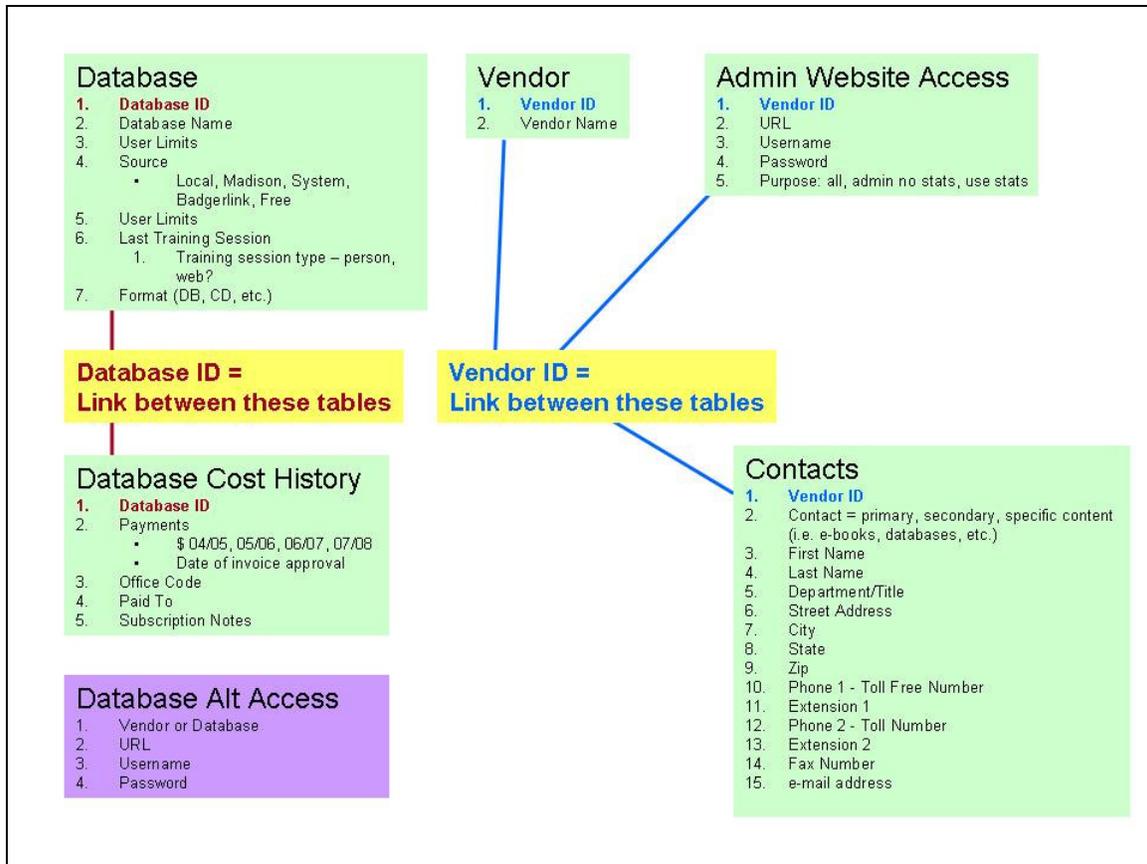
As time passed, my desire for an ERM grew, but it became clear that commercial ERMs were going to be extremely expensive. Furthermore, listserv posts and survey results began to reveal that commercial ERMs were not necessarily living up to librarians' expectations.

While I did not have a home-grown ERM, I began using a variety of tools to manage e-resources while also maintaining invoice binders and paper files for each database such as Excel, a blog, e-mail folders, etc.

However, a combination of factors led me to reignite my dream of a Microsoft Access database of databases:

- Mounting evidence that commercial ERMs were not living up to expectations. For example, in March 2008, I attended ER&L and in one session with about 75 attendees, the audience was asked "How many of you have a commercial ERM?" and "How many of you are happy with your ERM?" While about half of those in the room worked at libraries with commercial ERM systems, *no one* was happy with their system (e.g. one commercial ERM reportedly limits the field for entering licensing clauses to 250 characters).
- Budget deficits that were forcing cuts to acquisitions let alone the purchase of a new, very expensive management system.
- My extended absence from the office and the necessity for colleagues to be able to cover my responsibilities; they would need to be able to quickly and easily access a variety of data about our libraries e-resources.

I was delighted when our Systems Librarian, who uses Access for other library functions, data collection and reporting, agreed to assist. To communicate what I needed in ERM, I created a PowerPoint slide showing the tables and data fields I imagined would be needed; the green and purple boxes represented Microsoft Access tables.



This diagram became a blue print and a discussion point for our discussions about what I needed and what he could do with Microsoft Access. While aspects of the overall ERM were tweaked as it was developed, most of these tweaks were due to Bill’s insight and recommended enhancements by other e-resource librarians!

While I imagine that tweaks and updates will be needed, I am pleased that:

- Our ERM was quickly available *and* functional
- It did not cost five or more figures to purchase
- There is no annual access fee or reliance on an outside vendor for functionality updates
- Our ERM provides reports and functionality that facilitates better management of e-resources such as keeping track of training sessions and quickly generating a list of databases by renewal, access type, user limits, etc.

The following table lists various data related to e-resource management and how such data was organized before and after our locally developed Microsoft Access ERM.

E-Resource Data	Management Before Our ERM	Management After Our ERM
Vendor contact info	E-mail folders	Our ERM

Alternate access info (URLs, usernames, and passwords if EZ-Proxy access is not working)	Static staff web page	Our ERM
Usage and admin URLs, usernames, and passwords	Stored in Firefox	Our ERM and stored in Firefox
User limits	Static Intranet page	Our ERM
Subscription source (e.g. local, University of Wisconsin System, consortium, etc.)	Static Intranet page	Our ERM
Invoices	Binders	Binders
Vendor correspondence	Manila file folders / E-mail folders	E-mail folders
E-Resource news & alerts	E-Resource blog via Wordpress	E-Resource blog via Wordpress The blog allows quick dissemination and an easily accessible archive of Murphy Library's e-resource news. By tagging entries with labels such as "cancellations" or "trial" all librarians can easily retrieve information about how many trials, cancellations, etc. had occurred in a given year
Usage reports	Manila file folders / Excel	Excel Also available as a link in our ERM
License agreements	Manila file folders	Manila file folders for the full license agreement; however, key aspects of the license agreement (i.e. Interlibrary Loan, E-Reserve) rights) will be integrated into our ERM.
Expenditure tracking and budget predictions for locally purchased subscriptions	Microsoft Excel	Microsoft Excel Some basics are provided in our ERM For the 53 locally purchased subscriptions, managing financial info in Excel is feasible especially since the formulas and worksheets are already established.

Authentication method	Recorded with subscription information, but not organized.	Our ERM
Record of last training session	Not recorded	Our ERM
Dynamically generated reports (i.e. by database format, subscription status, renewal date range, etc.)	Not available	Our ERM
E-Resource problem logs	E-mail folders and Microsoft Word documents	Our ERM
Database subscription wish list	Not recorded	Our ERM

William's Creation of an ERM

Seeing the need to organize our vendors, databases, and contacts, I agreed to write a basic electronic resource management system. Since I know Microsoft Access, that is the platform I choose to use. I examined the Electronic Resource Management Initiative Deliverables web site at (<http://www.library.cornell.edu/elicensestudy/dlfdeliverables/home.htm>) to see what data elements should be in an ERM. There was so much in this document; I decided that the best approach would be to incorporate data elements as librarians requested them; otherwise, I feared I would never get a production ERM out the door.

Galadriel and I chatted about what sorts of information we needed in an ERM. We also discussed how these data elements should be related. At this initial stage we did not discuss queries and reports. After some back and forth reiterations of our ERM, the database was ready for some real data. I charged a couple of student employees with data entry while I added some additional data elements and fixed elements that were not working the way I initially thought they would. Then, I added a switchboard, as well as a few queries and reports. The ERM was ready for production for our campus.

In all, initial development took about 2 months and 40 hours of work. This is also the point where I decided that this ERM might also serve other libraries, especially smaller libraries who did not need an ERM as robust as the purchased products and/or who could not afford the big price tag of these commercial systems. I created a web presence for the ERM and got it indexed on several search engines. I also wrote some instructions. Knowing that there were additional data elements, queries and reports which other libraries would need, I decided to progress slowly. I showed the ERM to a few e-resource librarians that I knew might be interested and led a few demos. With each dialogue and demo, I added additional data elements, features, queries and reports.

Some of the current features of the ERM include:

- Vendor names (comes pre-populated with a core list) with multiple library-defined contact types (sales, accounts, support, etc.) possible for each with places to enter all the logical contact information;
- Linking specific databases to vendors;
- Data elements for funding sources, renewal dates, and payments;
- Data elements for user limits, authentication method, user limits, subscription status and subject/department affiliation;
- ILL, document delivery and e-reserve rights;
- URL links to journal lists, license agreements and user stats;
- Alternate login information is also included for training access or to give faculty and students who are not in your authentication system yet or who are not able to gain access through your authentication system;
- The ERM can also keep track of problems with specific vendors and databases as this information can be used to negotiate with vendors;
- Plus more.

One can use Access' filter function to find and sort on any data elements and there are also several reports currently available including:

- Payments Crosstab (an alphabetical list of databases in a table view listing payment information for each year);
- Payments (a list view by fiscal year of all databases and their cost);
- Year To Year Price Comparison (asks for the two fiscal years you want to compare and provides cost information as well as price increase and percentage increase for each database);
- Renewals for Date Range (a list of databases which will be coming due for the date range specified).

Of course, one can easily import data elements you might have in Excel, and other products through Access' import functionality. And, unlike some ERM systems, one can export data for some future migration to another system or for data manipulation.

Conclusion

While our ERM is not as robust or as complex as a commercial one, it is far less expensive, and it is a vast improvement over what we had! Several aspects of e-resource management are now stored in one place that helps us have a more dynamic workflow and provides our other librarians with access to this information in emergencies or back-up situations. A recent comment from one of our colleagues: "The ERM saved me at the reference desk last week. I forgot my computer and was using the reference computer. I was able to look up username/passwords to get access to title lists."

The niche for this ERM is likely to be smaller libraries and libraries that cannot afford or choose not to purchase a commercial ERM. This ERM may also serve as an interim management system to get one by until purchased ERMs function better and are worth their large price tags.

We are committed to improving the ERM as we are able. To start, there will be a new version available for download on a monthly basis.

The database is posted on the ERM's web site <http://murphylibrary.uwlax.edu/erm/>. Also available from the web site are instructions and a listing of new features available in each version as well as a link to make suggestions for improvements and a link to let us know if you are using the ERM so we can add you to a list to receive e-mail updates regarding new enhancements.

About the Authors

William Doering has worked for the University of Wisconsin-La Crosse for 14 years. He received his MS from the University of Wisconsin in Library and Information Science and currently holds the title, Systems, Catalog and Digital Initiatives Librarian.

Galadriel Chilton has worked as the University of Wisconsin-La Crosse since 2003. She received her MLS from Indiana University and a masters in Educational Technology from San Diego State University. In addition to working as the E-Resources Librarian, she teaches an instructional design/educational course for the UW-L's School of Education.