Choosing and Implementing an Open Source ERMS

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EXECUTIVE SUMMARY

The Rohrbach Library of Kutztown University manages its electronic resources using a disconnected array of resources including spreadsheets, paper files, email files, and a Google Docs account. Clearly, a more streamlined and unified approach would be beneficial. In this case, the authors investigate various Electronic Resource Management System (ERMS) options and whether they are a fit for the library. They then examine the decision to implement an open source option. Finally, the case describes the process of implementing and populating the open source ERMS, in addition to challenges experienced along the way.

ORGANIZATION BACKGROUND

Kutztown University is one of fourteen member universities of the Pennsylvania State System of Higher Education. The university was founded in 1866 as the Keystone Normal School, later becoming Kutztown State Teachers College, then Kutztown University in 1986. The University is comprised of the colleges of Business, Education, Liberal Arts and Sciences, and Visual/Performing Arts. Approximately 10,000 graduate and undergraduate students attend Kutztown University (Kutztown, n.d.).

Rohrbach Library provides patrons with access to more than 555,000 books, 56,000 print and electronic journal subscriptions, and 100 databases. The library employs one dean, ten professional librarians, and ten support staff personnel. Numerous student assistants are employed on a part-time basis.

The faculty and staff of the Electronic Resources and Periodicals Department at Kutztown University's Rorhbach Library are charged with the management of the library's electronic databases, electronic journals, and eBook collection. The department also administers the library's collection of periodical materials in print format and microforms. Additionally, it is responsible for the interlibrary loan functions at Rohrbach Library.

SETTING THE STAGE

Electronic resources in libraries are challenging to manage. Since they tend to be much more expensive than print collections, electronic resources often require approval to purchase (and renew) beyond the library at the administrative level. In addition to the normal workflow associated with collection development, the acquisition of electronic resources involves analyzing and interpreting complex licensing terms. Weir (2010) notes that these terms often have to go through the university's legal department, the dean, provost, and president to receive approval for contract language that the librarian has already reviewed. Once license terms are agreed upon and payment made, methods of accessing the materials must be provided. Ongoing issues of maintenance such as keeping track of payments and generating and interpreting usage statistics require significant attention. The deselection of electronic resources is not always done by choice in a library. Vendors that provide electronic resources seem to be in a constant state of flux, frequently buying or merging with other vendors, and dropping or adding electronic resources in the process. When a library does decide to drop an electronic resource, provision to provide access to the content that has been paid for may need to be established. Each step in this electronic resource workflow may entail different details for each separate vendor, and there are many vendors. Best practices and standards continue to be revised and created to deal with these complex resources.

Electronic Resource Management Systems (ERMS) provide an opportunity for libraries to move away from a scattered system of resource management. Pre-ERMS systems often housed relevant data in many places, including email, spreadsheets, databases, paper files, and facts within a librarian's mind. The traditional, more linear workflows for print subscriptions need to be broken down and re-conceptualized to scale to the volume of electronic content (Collins, 2009). An ERMS should enable the storage and retrieval of all this information within one system. The system

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