



# MAKING THE SWITCH TO OPEN SOURCE

The benefits of using an open-source electronic resource management system in your organization.

BY KEELY WARD & MORGAN WOOD

Electronic Resource Management (ERM) systems are essential for tracking the ever-increasing collection of electronic resources in today's libraries and information organizations. Using open-source software is an extremely cost-effective way to incorporate an ERM



system into your department. One of its most unique features is its ability to help hold vendors accountable by allowing librarians to organize and quickly access key information, such as contacts, issues, contracts and licensing, access rights, and supplementary details.

**O**pen-source software is available to everyone at no cost and is developed by the community on a volunteer basis. Accordingly, its development stems from user needs and input. In this case, the users are librarians.

### Why an Open-Source ERM System?

At our firm, we had never used a true ERM system to organize our information. Most recently, we were using a SharePoint list. But once we got going with the process, we quickly realized how desperately we needed a true ERM solution. Our firm selected CORAL, the only actively updated open-source ERM program on the market. Other open-source ERM systems are available, but none of the others are kept up to date. CORAL was particularly appealing to us because of its highly interconnected modules.

When assessing ERM platforms for our law firm, we focused on three factors. The first was price, and due to the nature of open-source, it was the most cost-effective option. The second factor was adaptability. We wanted something that could adapt to us, rather than us having to adapt to it. The final factor to consider was the lifespan. Our mindset when evaluating any new product is to look for something that will not only work for us today, but for the next five to 10 years. Open-source programs not only meet but exceed these three requirements.

Further, we spoke with Ladd Brown, head of acquisitions and a member of the Electronic Access Team at Virginia Tech, to see what they looked for in an ERM product. Ladd said that “with the vast number of purchased and open access electronic resources we maintain, contacting the vendor is a critical and constant task. The contact features of hot email addresses and admin module URLs in CORAL are very useful; [with] CORAL, it is pretty easy to keep the contact and admin information up to date.” He also discussed

the importance of storing licensing information, mentioning that he was “excited about adding acquisitions data and retrieving it without going into another system.”

### Planning and Implementation

In order to become familiar with the program and to begin planning for implementation, we spent several hours exploring the software’s demo site. This sparked a conversation about exactly how we wanted to manage our resources. The data we were holding was loosely shaped and structured. It became apparent that we needed to converse about what qualified as a resource versus an organization. The planning process moved into a deeper analysis phase to define what data would need to be sifted through these classifications. CORAL’s lack of concrete conventions, while at first intimidating, became one of its greatest assets. We found that it was important to set clear expectations about what information would be manually transferred because we believe an ERM system should be alive and constantly evolving—never fully complete.

Our server-side configuration was done by the support service provider ByWater Solutions. The front-end configuration that remained for us to complete was made easier because design customizability is at the heart of the CORAL system. While the beauty of the software is that it can be changed at any time, we wanted to start the project on a clean and solid foundation.

Once the front end of the ERM program was set up, we were ready for data entry. We entered everything manually to ensure accuracy and clean data. We tackled the Resources module first and entered in more than 200 resources and their corresponding information. Our previous ERM solution had little structure, so it made the most sense to start working in the module that had the most entries. The Organizations module was the next one we set up, which led us to look at which resources

had parent companies. Linking the organizations to the resources gave us our first taste of untangling webs we did not realize existed. CORAL's ERM licensing module requires license records to be attached to organizations. We combed through our licenses to find any other organizations that needed to be added for this purpose. After organizations were finalized and licenses were added, licenses were attached to their unique resources. Licenses can include several products, so this step required reading through each document before uploading it to the proper location.

In our efforts to further streamline our electronic resource acquisition process as a department, we took advantage of CORAL's Workflow feature. This feature alerts the whole team when new records are added and keeps records of acquisitions centralized in one place. CORAL's Management module was the last one to be tackled and allowed us to better document changes and revisions in department-specific materials. We chose to add only documents that were relevant to our team, rather than to a specific office or group.

We created our training for our ERM program by using three different methods: a training manual, video training, and test tasks for team members to complete. This helped cover all learning styles and ensured there were instructions that team members could reference in the future. Adding in the test tasks allowed everyone to have a hands-on experience and feel comfortable before adding real information.

### Best Practices

- **Cut off access.** When we unveiled our ERM program, we immediately cut off access to the old solution. As administrators, we still kept access for ourselves in order to reference it as needed for when users might have questions.
- **Get the team invested.** In open-source software, changes and upgrades are made based on the users' direction. Getting the team involved gives everyone a stake in the program. During one of our weekly team meetings

after debuting the program, we held a discussion to get feedback on what everyone thought and took suggestions for what could be improved.

- **Set clear guidelines.** With our previous ERM solution, everyone would add information and there was no clear standard on what to add or where to add it. For our new ERM program, one of the best things we did was create clear standards for what kinds of information users should input into the program and where each item should be added.
- **Get IT on board.** In some cases, you may want to use an internal IT liaison you trust. It's important to have someone within your organization you are able to contact; otherwise, the process and implementation may be slowed down. In our case, we used ByWater Solutions to handle all of our IT questions and needs.
- **Participate in software conversations.** Many open-source software platforms use a website such as GitHub to track software improvements and additions, a system also known as version control. By being active on GitHub for CORAL, we were able to keep track of what issues other users were having, what projects were being worked on within CORAL, what the latest patch would include, and when it would be released.
- **Be flexible with the process.** While the target debut date never changed, the schedule we originally set in our planning process had to be adjusted several times. As we went through the process, some modules took longer than expected and some data needed to be cleaned up more than we anticipated.
- **Be flexible with the program.** While open-source software is highly customizable, it can only be changed so much. At some point, you have to adapt to where (e.g., which module) you must input information into the existing program. In order for the software to remain open-source, the code cannot be independently

developed outside of the community's standards and processes.

### The Future

Open-source ERM systems are constantly evolving, and some features might not be solidly developed yet, but because changes are originated from within the community, libraries have a say in future developments. As Ladd points out, one of the most appealing aspects of switching to an open-source software is "the community of development and the transparency apparent from the community." Uniquely, open-source means not relying on top-down decisions for how library software should function. Additionally, it means not having to justify changes and needs to C-Suite commercial executives. As the library and legal fields are constantly evolving, committing to a flexible solution with a long-term deployment capability is paramount. Open-source ERM is a free and strong alternative to current legal and library products that will empower librarians and libraries of all types. ■

### AALL 2019 ALERT

Don't miss the session "Deep Dive: Things You Need to Know Before Moving to a New ILS," Monday, July 15 from 3:00 p.m. to 5:30 p.m. For more information visit [bit.ly/AALL19ILS](http://bit.ly/AALL19ILS).

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