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Seize the Data: Tracking an Academic Library's Electronic Resource Information Using Springshare's LibInsight

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Abstract

Like many libraries, the Franklin University Library needs to track information about electronic resources. Although the acquisitions librarian and systems librarian primarily use and maintain this information, other library staff may need to access it. Therefore, the library needs an electronic resource information tracking system which multiple librarians can access and edit.

The library initially used an Excel spreadsheet to track electronic resource information, but found the spreadsheet cumbersome and difficult to use. Next, the library created an Access database, but syncing issues resulted in conflicting databases and the potential for lost information.

These issues led the library to investigate other options. After reviewing standalone Electronic Resources Management (ERM) programs, the library decided to create a system to track its electronic resources information using a non-ERM program it already subscribed to: Springshare's LibInsight.

The library decided to use LibInsight for tracking eresource information due to concerns over cost, as well as the ability to create a custom LibInsight dataset to track the specific electronic resource information the library wanted. Since the library's staff already have LibInsight accounts, any staff member can view and edit information in LibInsight. After deciding to use LibInsight, library staff determined what categories of information to track and uploaded its eresource information. LibInsight lets the library update records when necessary.

While using LibInsight for eresource information storage causes some issues since LibInsight is designed for data analysis rather than tracking electronic resource information, the LibInsight electronic resources information dataset works better for this purpose than the Excel spreadsheet or Access database the library previously used. As a result, the library decided to use LibInsight to track this information.

Keywords: electronic resources management, electronic resources information, LibInsight

I. Introduction

The need for libraries to track information about their electronic resources ("eresources") has led to the development of a variety of "tools for managing the license agreements, related administrative information, and internal processes associated with collections of licensed electronic resources", known as Electronic Resource Management ("ERM") programs (Digital

Library Federations Electronic Resource Management Initiative, as cited in Duranceau, 2004, 91). Since “[l]ibraries all have unique needs” (Fournie, 2020) when it comes to managing their electronic resource information, “no single approach to the management of electronic resources prevails” (Breeding, 2018, 21). In addition to using specialized programs for managing electronic resource information, libraries also manage this information by using “informal lists, spreadsheets and databases” (Breeding, 2018, 18).

This paper explains how after unsuccessfully tracking information using a spreadsheet and a database and investigating dedicated ERM programs, the Franklin University library decided to use Springshare’s LibInsight program, which is designed for data analysis, to track information about the library’s electronic resources. The paper also discusses how the library created and uses a custom LibInsight dataset to manage its electronic resources information.

II. The Library’s Previous Methods of Tracking Eresource Information

The Franklin University Library tracks the following types of information about its electronic resources:

1. Resource information (name, vendor, account, proxied url),
2. Login information (for administrators),
3. Contact information (for both sales and technical contacts), and
4. License information (usage limits and restrictions).

Although the library’s acquisitions librarian and systems librarian are the primary users of this information (for managing and troubleshooting access), any member of the library’s staff may need to access the information to troubleshoot access issues when the acquisitions and systems librarians are not available. As a result, whatever method the library uses must permit multiple staff members to access, edit and find the recorded information.

Initially, the library used an Excel spreadsheet stored in a shared folder on SharePoint to track eresource information. While multiple staff members could access the spreadsheet to view or record information, library staff found the spreadsheet difficult to work with due to the large number of resources and information included on the spreadsheet -- the library’s final eresources tracking spreadsheet had 333 rows and 37 columns.

The library attempted to replace the eresources tracking spreadsheet with an Access database. Although the database’s format and search functionality did make it easier to find information, the Access database caused problems when accessed by multiple users. Because the database could not be opened directly in SharePoint, each employee who used the database had to load it on their local drive and sync through SharePoint. Issues with syncing led to conflicting databases when changes made by one user did not properly save, and the possibility of lost information. Due to the issues with syncing the Access database, the library needed to find a different method of tracking eresource information.

III. Investigating Software to Use for Eresource Management

The library needed a program that would (1) track and record eresource data without syncing issues, (2) be accessible to any staff member who needed it, and (3) provide an ability to search for and find information in a way that would be easily viewable. A number of dedicated ERM programs exist that provide these features. The library considered several dedicated ERM programs: FOLIO (an open source program), CORAL (an open source program) and ROAM (a proprietary program).

As open source programs, FOLIO and ROAM could, theoretically, be implemented at no cost to the library. However, the library's staff does not have the technical expertise to manage these open source programs. The library would have needed to pay to outsource the implementation/support of these programs. ROAM, a proprietary program, would have required the library to pay an annual subscription fee.¹

To avoid these costs, the library decided to create its own system for managing eresource information using Springshare's LibInsight program instead of using a dedicated ERM system. Because the library already had a subscription to Springshare's LibInsight which permits creation of unlimited datasets, using LibInsight to manage eresource information would not cost the library any money.

IV. Springshare's LibInsight

Springshare's LibInsight "is a data analytics platform built especially for libraries" (Springshare, n.d.b) which provides "a centralized place for multiple data sets to be kept, managed and analyzed" (Sewell & Cowell, 2020, 17).

LibInsight is organized around datasets, which are "where you store the data that you want to analyze" (Springshare, n.d.b). Libraries use datasets to input and record the data they want to analyze in LibInsight. In addition to providing predefined datasets "that focus on e-resources usage, circulation and acquisition analytics, budget analysis, and gate counts (Springshare, n.d.b), LibInsight provides users the ability to create "[c]ustom datasets [which] allow you to design your own dataset from scratch" (Springshare, n.d.a). These custom datasets "can handle any number of fields and field types" (Springshare, n.d.b). Our previous experience with

¹ After the library's initial development of the LibInsight eresources information dataset, the OhioNET consortium reached a deal with ROAM to provide ROAM to all consortia members. As a member of OhioNET, the Franklin University Library gained access to ROAM.

Although the library did experiment with ROAM, the library determined to continue using the LibInsight dataset described in this paper to manage eresource information due to the customizability of the LibInsight dataset. While the LibInsight interface is not as user friendly or attractive as ROAM's, ROAM records data in a fixed format which did not match the library's format. Switching to ROAM would have required the library to reconfigure its data, and use multiple screens to view data which could be viewed on a single LibInsight record.

LibInsight custom datasets led us to believe that we could create a custom dataset for eresource information.

LibInsight “allows libraries to keep all of their data in one secure place, in the cloud, that can be accessed from anywhere, on any type of device and at any time of day.” (Sewell & Cowell, 2020, 18). Because each member of our library’s staff has a LibInsight account, every staff member can access and, if necessary, edit eresource data stored in LibInsight.

An issue with using LibInsight for tracking eresources information occurs because datasets are meant for “time-based or transactional data” (Springshare, n.d.a) since LibInsight is designed for data analysis. The eresource information the library wants to track in LibInsight is not time-based or transactional, and our interest is in storing/accessing the data instead of analyzing it.

Even though our proposed use of LibInsight to store/manage electronic resource data differs from LibInsight’s purpose, and our data is not time-based, the accessibility, search and storage features offered by LibInsight met our needs and we believed that we could work around the date requirement and use a LibInsight custom dataset to manage our electronic resource information.

V. Using Springshare’s LibInsight to track Electronic Resource Information

Because Springshare did not create LibInsight to track eresource information, it did not have a predefined eresources dataset. To track eresource information we needed to create a custom dataset. This requirement benefitted the library because, unlike the dedicated ERM systems which would have required the library to follow their pre-defined formats for recording information, the custom dataset let the library identify the specific data it wanted to record.

A. Preparing to Create the Eresources Information Dataset

Before we could begin this process, we needed to decide what eresource information we wanted to track. Because LibInsight can import data from Excel, we exported the contents of our Access eresource information database into an Excel spreadsheet.

Once we had a spreadsheet with all of the categories and eresource information we had previously recorded, library staff reviewed the eresource information the library tracked to decide what information we should record going forward. After discussion, some categories were added, some deleted, and others renamed. Appendix A lists the final categories of eresource information the library decided to include in its LibInsight eresources dataset.

After determining what categories to include, we edited the spreadsheet by renaming categories, and deleting and inserting columns as necessary. We then reviewed the data to correct any obvious mistakes and moved on to creation of the eresources dataset.

B. Creating the Eresources Information Dataset

We created the dataset using LibInsight’s manage dataset screen. This screen gives users the option to indicate the type of dataset (custom) and define the content which the dataset will

record. Although LibInsight permits creation of a number of different field types, almost all of our data used the “text” field.²

The main exception involved the required system date field. Because, as mentioned above, LibInsight is designed for analysis of transactional data, data must be tied to a specific date and datasets have to include a system date field. Our previous methods of tracking eresource information recorded the date we last updated a record, so we designated last update date as the system date field. The requirement that each individual record in a dataset be tied to a specific date has implications when using the dataset to find or edit eresources information, as discussed below.

C. Initial Data Upload

Information is added to a dataset using the LibInsight record data screen. In addition to permitting individual entries, this screen provides an option to upload and import records from a spreadsheet.

Because of the large amount of information we needed to load, we wanted to use this data import function to load the information we had previously tracked so that we did not need to manually re-enter the data. Unfortunately, the data upload did not go smoothly.

Attempts to upload the eresources spreadsheet we exported from our Access eresource information database to populate the LibInsight eresource information dataset resulted in repeated error messages and a number of emails to Springshare support. Ultimately, Springshare determined that the spreadsheet we had included line breaks for data, and LibInsight was unable to process the line breaks. Doing a search/replace to change the line breaks to semicolons solved this problem and we successfully uploaded our existing eresource information to our new LibInsight eresources dataset.

D. Managing Records

The library can either add information about new resources or edit information about existing resources from the record data screen. When we add a new resource, we can use the form on this screen to manually input information.³ The screenshot below shows a partial view of the record data screen (which is too large to fit on a single screenshot):

² In addition to the “date” field discussed in the following paragraph, the other field which we did not designate as a text field required a “yes/no” answer. We set that field up as a “single select” field.

³ The library created the layout and order of the fields on the record data screen when we created the dataset, and LibInsight permits modification of the layout and order of fields on the record data screen in the manage data screen.

<p>Last Updated <input type="text"/></p> <p>A. Name <input type="text"/></p> <p>B. <input type="radio"/> Yes <input type="radio"/> No Currently subscribed/owned? (ie we SHOULD have access)</p> <p>C. Account Number <input type="text"/></p> <p>D. Vendor (Who we pay or how we get) <input type="text"/></p>	<p>L. Technical Contact Name <input type="text"/></p> <p>M. Technical Contact Number <input type="text"/></p> <p>N. Technical Contact Email / Portal <input type="text"/></p> <p>O. Sales Contact Name <input type="text"/></p> <p>P. Sales Contact Number <input type="text"/></p>	<p>R. License Location <input type="text"/></p> <p>S. Auth users <input type="text"/></p> <p>T. Copyright mentioned in license? <input type="text"/></p> <p>U. Use in Course Reserve? <input type="text"/></p> <p>V. Use in CMS? <input type="text"/></p>
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We can also use the record data screen to edit a record. The record data screen provides an option to manage records where users can either scroll down all entries to view the records and find a record or search for a record.

The system date feature discussed above does cause an issue when using the search function in the manage records screen: When searching for a record, LibInsight searches within a specified date range. The default range does not include all records. To avoid problems finding records, users need to set the date range to include the entire available date range. However, it is easy to forget to do so, resulting in a search which does not find a record which exists, but is outside of the searched date range.

E. Finding Eresource Information

Librarians who need to find information stored in the eresources dataset can do so using either the manage records screen or the analyze screen. Both methods search within a specified date range and may fail to show records if the user forgets to expand the date range.

A search in the manage screen searches the entire record. This could be helpful if a librarian needs to search for a term but does not know which field records the term. However, more frequently, it causes a problem when a term in the title is also used in other records. For example, the library has only 4 records with “Sage” in the title. However, a search in the manage records screen for sage provides 26 results because it includes records which contain the word “usage.”

The other option is to use the analyze screen to search. Although the purpose of this screen is to analyze statistical data, it can be used simply to display records. The advantage of using the search option from the analyze screen is that it contains search filters which permit the user to filter by name and search only the name field. A search on this screen for “sage” with the name

filter applied finds 5 records (the 4 sage records, plus one additional one which contains the word “usage” in the name).

Home / All Datasets / L: Library Eresource Information Analytics

L: Library Eresource Information Analytics Go To: L: Library Eresource Information (#25002)

There are 343 records in total for this dataset. The earliest record found is from Aug 12, 2013.

From Aug 12 2013 To Jul 31 2021 Limit to All Days between 0 hrs and 24 hrs Duration 0 mins.

Entered by Everybody Order by Date desc

Add Additional Report Filter Select a Field to Filter

- A. Name contains "sage" [X]

Generate Report Save Report Filter Clear All Filters

Data Grid Field Analysis Time-Based Analysis Duration Distributions Cross Tab Report Trends Export Data Saved Report Filters

Found 5 records, out of total 343 in this dataset (or 1.46%)

VI. Conclusion

Overall, using LibInsight to record the library’s eresource information has worked better than the alternatives. The information is searchable and accessible to all staff members. The screens displaying information make it easy for users to find the information they need about a resource, which is an advantage over our previous Excel spreadsheet. Since the LibInsight datasets are maintained in the cloud, we do not have issues with conflicting or missing data which occurred when we stored this data in an Access database.

The biggest problem with using LibInsight for managing our electronic resources information relates to LibInsight’s requirement that records be tied to a specific date. It is easy for a librarian searching for information will to forget to update the date range being searched to include all available records, which means that the record they are looking for will not display. However, it is easy enough to expand the date range and re-run the search when this happens.

LibInsight lets the library record eresource information in a custom dataset which all library staff members can access. The system makes it easy for staff to find and view recorded information (as long as they remember to expand the date range). Given the difficulties the library had when recording information in the Excel spreadsheet and Access database, these factors, combined with the cost (free, since the library already had an unlimited dataset subscription to LibInsight) have led library staff to determine that the overall benefits of using LibInsight to track eresource information outweighs the difficulties caused by the date range requirement.

Appendix A: LibInsight Eresources Dataset Categories

We track the following information in our LibInsight eresources dataset:

- Last Updated – system date field
- IP Address -- system field
- Internal Notes – system field
- Entered By – system field
- A. Name – text field
- B. Currently subscribed/owned? (ie we SHOULD have access) – single select field
- C. Account Number – text field
- D. Vendor (Who we pay or how we get) – text field
- E. Platform – text field
- F. User limits – text field
- G. Proxied URL – text field
- H. Stats Portal – text field
- I. Stats Password – text field
- J. Admin portal – text field
- K. Admin password – text field
- L. Technical Contact Name – text field
- M. Technical Contact Number – text field
- N. Technical Contact Email / Portal – text field
- O. Sales Contact Name – text field
- P. Sales Contact Number – text field
- Q. Sales Contact Email – text field
- R. License Location – text field
- S. Auth users – text field
- T. Copyright mentioned in license? – text field
- U. Use in Course Reserve? – text field
- V. Use in CMS? – text field
- W. Use for ILL? – text field
- X. Use in Coursepack? – text field
- Y. Scholarly sharing? – text field
- Z1. Multilingual component – text field
- Z2. Notes (if cancellation provide date/reason) – text field

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