# SOMEWHERE Over the VERDE Rainbow

by DONNA F. EKART

'What is Verde?" I looked around the table at my colleagues, wondering if anyone would respond with something other than "an electronic resources management system?" Silence. "Why did we buy it?" I continued, hoping there was a real answer that wasn't "because we bought Meridian, and then that turned into vaporware, so we rolled the license to Verde when Endeavor and Ex Libris merged." I wouldn't have been concerned so much about the responses, or lack thereof, if this was a preinstallation kick-off meeting. Nor would there be cause for concern if I was talking to librarians who worked in reference, or instruction, or some other area that primarily concerned itself with the consumption of electronic resources rather than in their back-end management. Instead, though, I looked out at capable and competent librarians whose expertise lay in serials, in acquisitions, in technology, in cataloging, and I looked at them after months of meetings and discussions and training and practice, and I saw the same hesitant yet hopeful … blankness that I felt in my own head when I tried
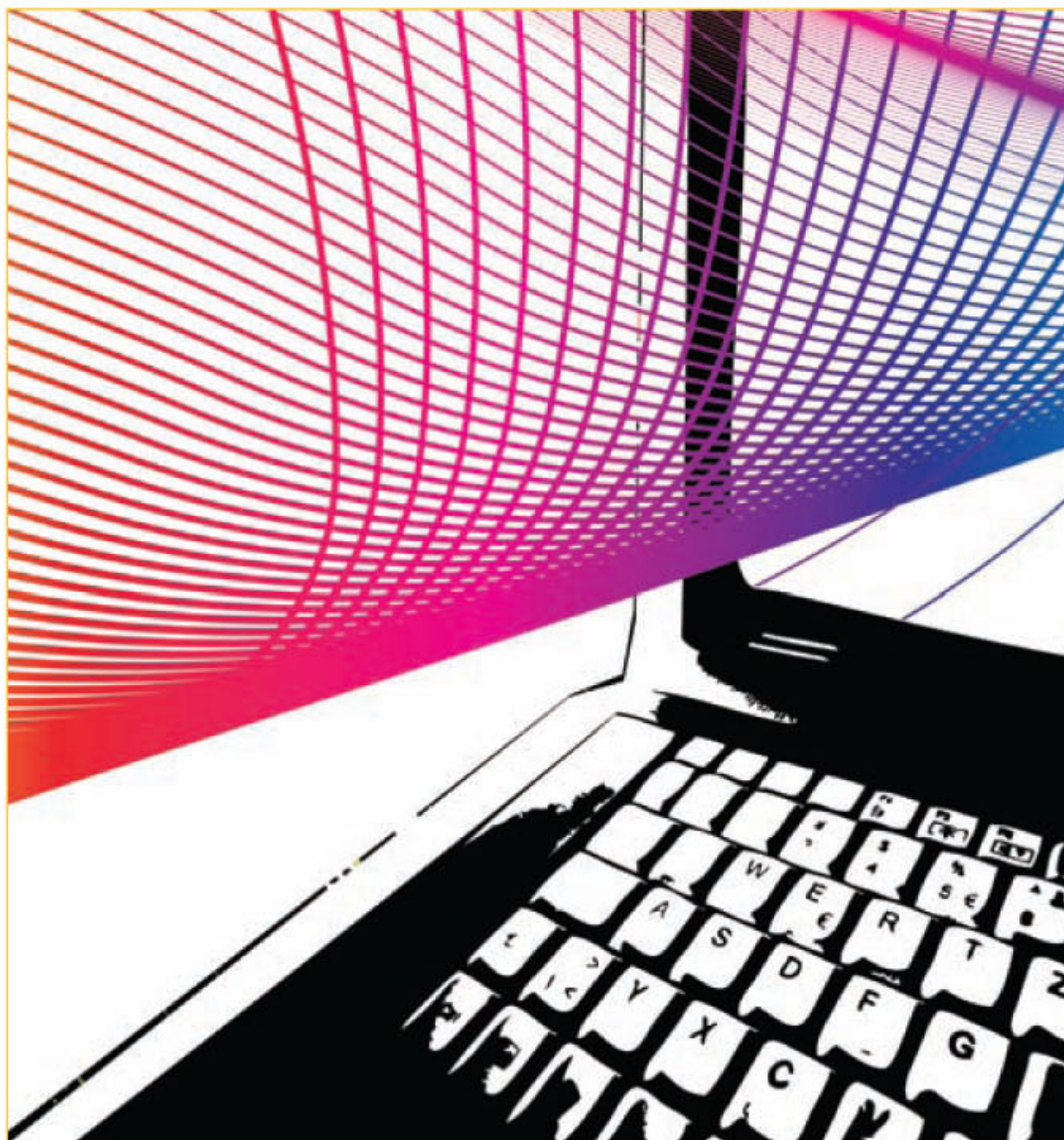
to describe what we were doing with Verde. We had an electronic resource management system (ERM) installed and "in production"; we had a notion that this was fairly cutting edge—but cutting edge of what?

Once Upon a Time in Kansas

Our ERM saga at K-State (Kansas State University) Libraries actually began before I started working there, with a homegrown database coded in 1999 by a student employee. It suffered a horrible data loss about a year later. Repopulated largely by the efforts of a former associate dean, it limped along for years after anyone who could repair its many faults was long gone. With all its odd quirks and missing data, the "contract db" presented a challenge for the librarians responsible for electronic resources. It was a decent data repository, but it had no ability to manage the tangled process of licensing, acquiring, activating, using, evaluating, and renewing electronic resources. These processes lived with several different individuals, in at least three, and sometimes four, distinct departments in the libraries. Efforts were made to consolidate information that could not be shoehorned into the database (email correspondence, license files, etc.) to a shared network folder, but a good deal of vital information remained, almost by necessity, available only in the memories of those individuals who worked closely with electronic serials and databases. When I first started learning about electronic resources, I was in awe of the vast knowledgebase fully contained inside these minds and the casualness with which these people would rattle off the pedigree of various journals: "That's Taylor and Francis. We used to get it direct, then they moved to Meta-Press, and now we get it all at Informaworld along with the Routledge titles." MetaPress? I'd wonder, as they went on to another topic. In its own

way, the system worked, especially for those intimately involved with it, but the clear and present danger was the proverbial being hit by a bus—if the libraries lost one of these individuals to retirement, or a new job, or even a promotion within the organization, the information would be lost as well.

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When vendors began producing ERMs, it seemed like the next logical step to take. Grab the data we had, put it in a more functional, fully featured system, and all our problems would melt away. Since we were already committed to Endeavor products, with Voyager, ENCompass, and LinkFinder*Plus*, it seemed a foregone conclusion that Meridian would be our ERM of choice. We made plans for implementation but, due to some timing issues, didn't get it installed before Endeavor merged with Ex Libris. By then, we had already abandoned ENCompass and LinkFinder*Plus* for SFX, so converting our Meridian license to Verde made a lot of sense. The decision was made to go with a hosted implementation, rather than a local installation, due to staffing and server issues. Of course, some of this is hearsay because my involvement begins after all of these decisions were made, in May 2007, when I was asked to manage our Verde implementation project.

Setting Out on the Yellow Brick Road

Assembling the right team is vital to any large project. For Verde, it was important to have representation from all areas that would be heavy users of the tool—one of the weaknesses of our old system was that it wasn't useful for so many of the libraries' staff members. Our initial working group consisted of me, our SFX administrator, a serials librarian, an acquisitions librarian, the head of cataloging and serials (in her role as licensing coordinator), a subject librarian who also happened to be our consortia agreement coordinator, and a systems administrator. Also tapped for input on an ad hoc basis were a librarian with experience gathering and interpreting usage data, the Voyager systems administrator, the web development librarian, a programmer, staff members from interlibrary loan, and a resident librarian who was learning about serials cataloging.

Our early meetings, while interesting from a discussion standpoint, were almost purely philosophical. No one had seen any ERM (much less Verde) in production, and thus our talk of how and who and what was based in pure speculation. Our first conversations with Ex Libris began with conference calls in June 2007 to set out expectations and to come up with a time frame for installation and training. With an updated version of Verde about ready to roll out, it was necessary to postpone installation until the early fall when this version would be available and stable. We settled on late September and early October 2007 dates for installation and training and decided to wait on any other conversations until that was complete.

Is This the Emerald City at Last?

September came and brought the creation of our test and production instances of Verde on Ex Libris' servers, as well as a secondary test instance of SFX installed on our own servers.

At K-State Libraries, we use our stock "test" instance of SFX as a staging area that rolls automatically to production, and we have a resource-linking librarian who makes sure our SFX service is always up-to-date and running smoothly. Therefore, we didn't want as-yet-undefined Verde processes to have any interaction with our near-pristine SFX setup during implementation. This necessitated installation of a wholly separate instance of SFX just for "Verde practice," and it proves to be a great aid to our work to this day, as we try to understand the implications of having Verde push information out to SFX. Once Ex Libris staff completed these projects, we were ready for training with an implementation librarian from Ex Libris.

Training consisted of 2 days on-site plus a pretraining web session and is a standard part of any Ex Libris product license. We had 12 seats available, so the entire team was able to attend. Even though some of these individuals would not have a large role to play in getting Verde up and running, it was beneficial to have broad exposure given that Verde had the potential to impact the work of librarians and staff in diverse areas. The web session served to get us all on the same page with Verde terminology and structures, and we have returned to the information given that day numerous times to educate other staff members about Verde as the need arises. The 2 days of on-site training were intensive, with explanations and practice exercises for nearly every aspect of the Verde system. Staff members were able to come and go to sessions based on work roles, but with so much of our process related to Verde undefined, it proved useful for most individuals to stay for the entire training time. After the training was complete, Ex Libris helped us create a project plan for moving from implementation and our current work processes to live-production Verde by Jan. 1, 2008. I'd love to say that armed with that plan, we moved forward with ease into a glori-ously functional new world of managing our electronic resources, but that was not to be the case.

Battling the Wicked Witch

The plan was good, we were ready, the software was installed, what could possibly be the barrier? It certainly wasn't lack of trying. We met the week after training and identified four smaller work groups: a group to decide on required/optional/omitted fields for various screens; a group to customize the field names to reflect our local vocabulary; a group to choose default values and field names for the licenses area; and a group to customize the Verde workflows to adapt to, but not be bound by, our current practice. Those groups soldiered dutifully out and tried to do work. What followed was something I call "The Time of Great Confusion." Nothing but the smallest decisions got made. We had an individual prepared to scan paper licenses for uploading to Verde but no idea what the licensing workflow was going to look like. Interlibrary loan staff gave us solid answers about what they needed to see for data, but we lacked a strategy for getting that data from the old contract database to Verde. Everything else was so interdependent that it seemed impossible to make any choices. The workflow group, in particular, found it difficult to proceed without some definitive answers about the availability and skill sets of employees who might be tapped to do work in Verde. Our library was in a time of change, with a new dean and associate dean, an organizational redesign, and a new and ambitious strategic plan all within the last 5 years. This meant change had come, and more could be glimpsed on the horizon. It was a time of many possibilities and few known quantities, and for Verde, we needed some certainties from which to begin. For a few months we talked, and fiddled, and talked some more. As the Jan. 1 production date loomed, it became clear that we were not ready for our timeline.

No one had seen any ERM in production.

Regrouping after a brief holiday break, past our original "do or die" date, we met to discuss what the barriers to production were. To me, it seemed the time to start back at square one: What was Verde, why did we have it, and what was in the way of our starting to use it *today*? In truth, all that was in our way was ourselves—we expected some magic solution, some transformation that would occur as we declared ourselves "in production." The reality was that all that lay between us and production was a lot of work. Starting up with Verde forces a library to enter a world where every subscription is brand new, and tasks that are manageable enough spread out over the course of a year become something else entirely when aggregated into a single moment.

We made one difficult decision that cut the potential work drastically. The data in the contract database had been hanging over us; it was too untrustworthy to do any sort of data dump or export for transfer to Verde, so we had been facing the possibility of going through, record by record, and copying information manually to Verde. No one had the time or energy for such a project, especially since little of the information mapped neatly to an existing Verde field. We decided to all but abandon the data transfer as a singular project and transfer administrative data, status for interlibrary loan, and other minimal information at point-of-need. In other words, if we needed to use the contract database for a particular title or package, we should move data so that it was the last time we had that

need. This strategy has worked well for us, and I suspect that in the end, it will reveal that the bulk of the data in the contract database was outdated or easily found by other means. We're planning to have staff members systematically look up a few last items, such as administrative logins. This will provide us with both data and a fairly "safe" practice exercise for individuals not yet trained in Verde.

The other hurdle to cross was that of using the Verde workflows. They present both a grand opportunity and somewhat of a threat. On the one hand, they automate or routine-ize so many processes that, once established, far fewer tasks will "slip through the cracks," and it will be much easier for new staff members to jump in and work without having to absorb a massive history and idiosyncratic ways of doing work. On the other hand, they are dictatorial. Ways of doing work will change, by necessity, according to the demands of the system. Not everyone welcomes being told, "OK, now do this" by a software package. We struggled with customizations, trying to shoehorn our current processes into the available site-specific tasks. In the end, it seemed as if we were building a strange Frankenstein hybrid—not quite Verde, not quite ourselves—and decided to make only very minor workflows modifications, mostly to the "who" and not the "what." We're still tweaking here and there and learning new ways of working together, but I have to believe the end result will be much more efficient and reliable than any workflow we could build by hand.

With these decisions made and work progressing, we declared ourselves "in production" on March 13, 2008. "Production" Verde is much more primitive a concept than "production" with our ILS, but we're using it exclusively, not adding information to the old contract database, and gradually adapting our work to the system. Tasks that still lie ahead are training and practice for librarians and staff in acquisitions and

A screen shot of Verde's website.

cataloging units and the gradual integration of subject librarians into Verde workflows for purchase and renewal matters. We are also still exploring having Verde push information to our SFX instance. As mentioned before, we're very happy with our highly functional SFX installation and are moving very cautiously with anything that might upset our balance. Also, we have the unusual benefit of having a full-time librarian devoted to the care and feeding of SFX, so it's less critical for us to have a fully automated process on that end.

We Always Had the Power … We Just Had to Learn It for Ourselves

As we approach the first anniversary of our life with Verde, there are definitely some lessons to be taken from our experience. First, it's unlikely that a library is ever going to be fully "ready" to implement an ERM, so it's probably not a good idea to make being ready a goal. A good deal of our "getting ready" work didn't lead to anything—partly because we had to switch products midstream when Meridian went away but also partly because we had no idea how an ERM would impact our day-to-day lives as librarians until it was staring back at us from our computer screens. The philosophical nature of some of the discussion time was good, in an academic sense, but the decisions we thought we were making disappeared into the ether.

Second, an ERM will undoubtedly bring a great deal of change to your library's workflows and processes.

However change is best handled at your institution, prepare yourself to do that, because it's not just a little system that your electronic resources librarian will have to learn, it's a glimpse into the future of libraries where e-resources are the bread and butter of library work for nearly every employee.

Finally, and most importantly, ERMs aren't magic. Sometimes librarians tend to talk and think about them as if they are, and that's probably because, as Arthur C. Clarke famously said, "any sufficiently advanced technology is indistinguishable from magic." ERMs are advanced technology for libraries, but in essence, you get no more out of an ERM than you are willing to put in. We had a joke among our working group that Verde was going to tidy up our resources, make our work easier, and then bake us a celebratory cake. It hasn't done any of that yet. It will do it (well, except for the cake), but only because we put the work into it up front.

So we return to the question from the beginning: What is Verde? We still don't quite know. We're still left with processes spread across departments and too much information in people's heads, but now there's a place, a centerpiece, to build a sensible workflow around. Maybe Verde is a mirror, reflecting our unkempt selves and helping us have a vision of what could be. It will be fun to find out.

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