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TERMS and Conditions Apply: Refining Best Practice for Electronic Resource Management

Graham Stone  
*University of Huddersfield*

Jill Emery  
*Portland State University, jemery@pdx.edu*

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TERMS and conditions apply: refining best practice for Electronic Resource Management
Librarians and information specialists have been finding ways to manage electronic resources for over a decade now. However, much of this work has been an ad hoc and learn-as-you-go process. Chapter 1 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” shows that the literature on electronic resource management is segmented into many different areas of traditional librarian roles within the library. In addition, the literature shows how management of these resources has driven the development of various management tools in the market, as well as serving as the greatest need in the development of next-generation library systems. Techniques in Electronic Resource Management (TERMS) is an attempt to create an ongoing and continually developing set of management best practices for electronic resource management in libraries.
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TERMS 2: Acquisition

- Compare specifications
- Negotiate license
- Review the license
- Renegotiate the license
- Sign the agreement
- Record metadata
TERMS 2: Compare Specifications

- Purchase order needed for invoice?
- DDA-need a deposit account?
- Contract that outlines purchasing terms?
- Request a license for review
- Annual review process?
- Discounts for multiyear deals?
TERMS 2: Negotiation Points

- Definition of site
- Definition of users
- Remote access
- IP authentication
- Article-level linking
- Mutual indemnification
- Privacy clauses
- Provision of usage statistics
- Content transfer
- Use of third party discovery tools
- Funding out clause
- Venue definition
- Perpetual access clause
- Price cap allowance
TERMS 3: Implementation

- Test
- Market
- Train and Document
- Do a Soft Launch
- Assess Feedback
- Launch
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**TERMS 3: Soft launch / launch**

- Depending on the scale and type of resource
  - Subscriptions: as soon as the guides are ready
  - PDA may only be a soft launch
  - A platform may need both to gather feedback
TERMS 4: Ongoing Evaluation & Access

- Types of Evaluation
- Check the Implementation
- Ask Your Users
- Check Changes to Coverage of Resources or Platform Migration
- Track Downtime and Availability
- Communicate with the Vendor
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**TERMS 4: Communicate with the vendor**

- Keep a dossier of correspondence
  - Problems, troubleshooting etc.
- Talk to the community
  - Listservs
  - Shared notes on KB+ or consortia pages
- User Groups
  - Find out if there is one
  - Talk to colleagues at regional and national meetings
  - Feed back ideas

![Image link](http://www.flickr.com/photos/ahere-r/u/4079943841/)
TERMS 5: Annual Review

- Schedule
- Confirm ongoing costs
- Usage statistics
- Report to stakeholders
- Make choice
- Renew or cancel
TERMS 5: Set a Schedule

- August-October
- November-January
- February-April
- May-July
TERMS 5: Example of resource report

Usage:

- August
- September
- October
- November
- December
- January
- February
- March
- April
- May
- June
- July

Graph showing resource usage over time from August to July with five different years indicated.
TERMS 5: Example of usage workflow
TERMS 6: Cancellation & Replacement

- Consult with stakeholders
- Notify provider/vendor
- Notify patron base
- Notate records
- Investigate open access options
- Evaluate replacement options
TERMS 6: Consultations

- Stakeholders
- Provider/Vendor
- Patron Base
TERMS 6: Example of Cancellation

Cancellation of an E-journal

Shared by staff at Texas A&M University
TERMS 6: Explore OA Options

- DOAB
- DOAJ
- Digital Humanities Now
- OJS Publishing
- Repository Publishing
FUTURE CONSIDERATIONS

- E-Book Management
- Article Publishing
- New Forms of Scholarship
- Next-Gen Library Management Systems
- Web Scale Management
- Workflow Versions
Contact Information

- **TERMS1 EDITOR**: Ann Kucera (akucera01@baker.edu)
- **TERMS2 EDITOR**: Nathan Hosburgh (nathan.hosburgh@montana.edu)
- **TERMS3 EDITOR**: Stephen Buck (stephen.buck@dcu.ie)
- **TERMS4 EDITOR**: Anita Wilcox (a.wilcox@ucc.ie)
- **TERMS5 EDITOR**: Anna Franca (anna.franca@kcl.ac.uk)
- **TERMS6 EDITOR**: Eugenia Beh (ebeh@library.tamu.edu)

- Jill Emery jemery@pdx.edu
- Graham Stone g.stone@hud.ac.uk
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References


- This presentation: http://eprints.hud.ac.uk/17129