4-8-2013

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

Graham Stone
University of Huddersfield

Jill Emery
Portland State University, jemery@pdx.edu

Let us know how access to this document benefits you.

Follow this and additional works at: https://pdxscholar.library.pdx.edu/ulib_fac

Part of the Library and Information Science Commons

Citation Details
https://pdxscholar.library.pdx.edu/ulib_fac/5
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.
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.
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.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
TERMS 1: Desk top review and trial

- Fiscal responsibility
  - Check the product hasn’t already been purchased
  - Use overlap tool available from the vendors

- Multiple platforms
  - Is there a preferred choice?

- Trial
  - 1 month is not enough!
    - Sponsored trials?
  - Timing and dissemination are crucial
  - Record the feedback

Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
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
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
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
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.
Chapter 2 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a basic framework that should be considered with every new purchase or addition to content selected for inclusion in the twenty-first-century library. While collection management and development policies help outline the general aspects for collection purchase, in today’s libraries, many of the standard rules applied to print acquisition are no longer sufficient. This is especially true with the advent of patron-driven purchasing models for e-books. The selection of purchasing models in themselves now plays a role in how and why specific content is selected for inclusion in any given collection of library material. Before any e-resources are purchased or selected for addition, there are some basic guidelines to consider when making selection decisions for content.

**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
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 for different years.
TERMS 5: Example of usage workflow

ICR Workflow: Usage Statistics

- Record Management
- Usage Statistics Gathering
- COUNTER v.s. Non-COUNTER (see Word doc)
- COUNTER vs. Non-COUNTER (see Word doc)
- 360 Counter resource list
- Resoures currently included in 360Patent
- 360 Counter (see Word doc)

Coordinating:

- All usage data will be consolidated & archived to one place on the L drive.

Steps:

1. Submit the form to the Librarian
2. Submit the form to the ITS
3. Submit the form to the ITS
4. Submit the form to the ITS
5. Submit the form to the ITS
6. Submit the form to the ITS
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

http://www.flickr.com/photos/44343741@N04/449309398/
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 ([akucero1@baker.edu](mailto:akucero1@baker.edu))
- **TERMS2 EDITOR**: Nathan Hosburgh ([nathan.hosburgh@montana.edu](mailto:nathan.hosburgh@montana.edu))
- **TERMS3 EDITOR**: Stephen Buck ([stephen.buck@dcu.ie](mailto:stephen.buck@dcu.ie))
- **TERMS4 EDITOR**: Anita Wilcox ([a.wilcox@ucc.ie](mailto:a.wilcox@ucc.ie))
- **TERMS5 EDITOR**: Anna Franca ([anna.franca@kcl.ac.uk](mailto:anna.franca@kcl.ac.uk))
- **TERMS6 EDITOR**: Eugenia Beh ([ebeh@library.tamu.edu](mailto:ebeh@library.tamu.edu))

- Jill Emery ([jemery@pdx.edu](mailto:jemery@pdx.edu))
- Graham Stone ([g.stone@hud.ac.uk](mailto:g.stone@hud.ac.uk))
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.
References


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