Developing TERMS: Techniques for Electronic Resource Management

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Developing TERMS: techniques 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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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: Investigation of New Content**
- Know what you want to achieve
- Write Your Specification Document
- Get the Right Team
- Do a Desktop Review of Market and Literature and Then a Trial Set-Up
- Talk to Suppliers or Vendors
- Make Your Choice
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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

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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 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 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 usage over time with different years.
TERMS 5: Example of usage workflow

- COUNTER v.s. Non-COUNTER (see Word doc)
- Resources currently included in BeSet & COUNTER (see Word doc)
- Record Management
- Solicitation & New Titles
- Request for Usage Statistics
- ESR Workflow: Usage Statistics
- 360 Counter
- All usage files will be consolidated & archived in one place on the L drive.
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 Eugenia Beh, 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
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References


- This presentation: http://eprints.hud.ac.uk/16863