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Techniques for Electronic Resource Management (TERMS): From Coping to Best Practices

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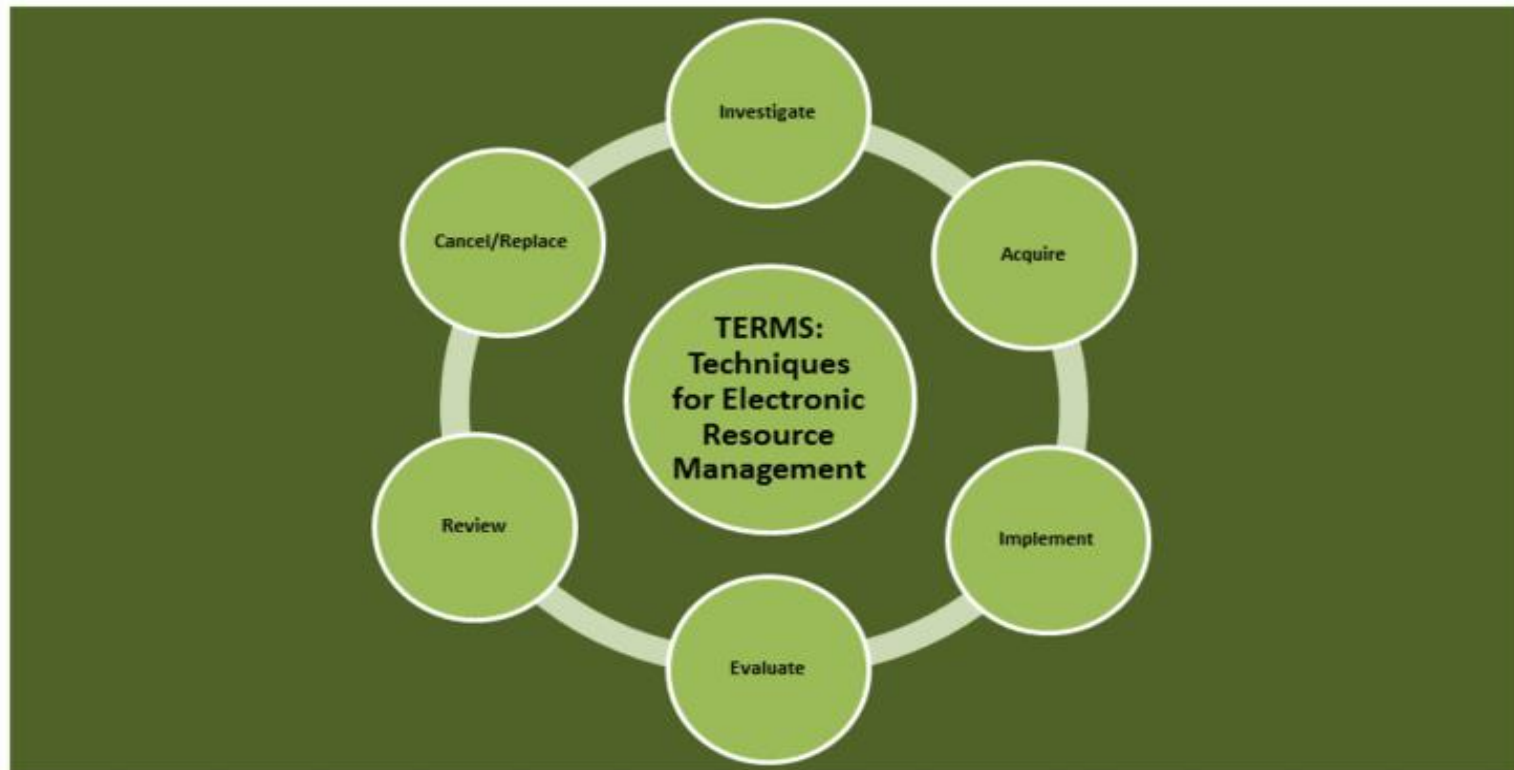
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# Techniques for Electronic Resource Management (TERMS): From Coping to Best Practices



## Introducing TERMS

- 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
- The literature on electronic resource management is segmented into many different areas of traditional librarian roles within the library
- Techniques in Electronic Resource Management (TERMS) is an attempt to create an on-going and continually developing set of management best practices for electronic resource management in libraries



## Needs assessment

- **Collection development**

“Over half of the libraries tried to address ER [Electronic Resources] in some way. However, most policies contain traditional language with a section on library ER inserted into the latter portion of the document”

**Mangrum and Mary Ellen Pozzebon (2012)**

“a lack of established policies and procedures for assessment puts a library at risk for financial loss...”

**Thomas (2012)**

“Many procedures are not documented and rely on informal channels of communication”

**Adlington (2006)**



## Needs assessment

- o **ERMs and workflows**

“less like a silver bullet and more that a round of buckshot.”

**Collins and Grogg (2011)**

“[o]ver a third of librarians surveyed prioritized workflow or communications management, and they called it one of the biggest deficiencies (and disappointments) of ERMS functionality.”

**Collins and Grogg (2011)**

“rethinking e-resources workflows and developing practical tools to streamline and enhance various inelegant processes have become the priorities.”

**Han and Kerns (2011)**



# #6terms



Pesch's electronic resources life cycle. Source: Oliver Pesch, "Library Standards and E-Resource Management: A Survey of Current Initiatives and Standards Efforts," *Serials Librarian* 55, no. 3 (2008): 482, doi:10.1080/03615260802059965.



## Techniques in E-Resources Management

- **TERMS 1**
  - Investigating New Content for purchase
- **TERMS 2**
  - Acquiring New Content
- **TERMS 3**
  - Implementation
- **TERMS 4**
  - Ongoing Evaluation and Access
- **TERMS 5**
  - Annual Review
- **TERMS 6**
  - Cancellation and Replacement Review



## Learning objectives

- **Takeaway 1:** Participants will be able to list the six workflows that comprise the TERMS framework.
- **Takeaway 2:** Participants will be able to create a set of best practices for electronic resource management workflows within their individual libraries.





## Program

- 9:00 a.m. Welcome & Introduction
- 9:30 a.m. Presentation 1 - TERMS 1 & 2
  - Group work: Mapping trials & acquisition of resources
- 10:45 a.m. Morning Break
- 11:15 a.m. Presentation 2 -TERMS 3
  - Group work: Mapping activation of resources
- 12:00 p.m. Morning Wrap-up
- 12:15 p.m. Lunch



## Program

- 1:45 p.m. Presentation 3 - TERMS 4 & 5
  - Group work: Outlining what evaluation/Analysis of Resources Needed
- 3:00 p.m. Afternoon break
- 3:30 p.m. Presentation 4 - TERMS6
  - Group work: Mapping Cancellation Communication Plan
- 4:15 p.m. Looking forward – TERMS7?
- 4:45 p.m. Wrap up/Questions
- 5:00 p.m. Preconference Ends



## Introductions and hands-on activities

- Split into smaller groups
- **TERMS is designed to be used with all types of e-resource, however, today we'll be concentrating on:**
  - Databases, e.g. Lexis
- **We would like your permission to share your thoughts today on the TERMS wiki**



# TERMS 1: Investigation of New 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**



## **TERMS 1:**

### **Know what you want to achieve**

- **Need new/different content**
- **Specialized funding request**
- **Need new service**
- **Want to fill gap in collection with demand driven option**
- **Investigating new platform offer**
- **Investigating new model of scholarship**



## TERMS 1:

# Write your specification document

Patron Driven Acquisition – supplier platform review

Product:

Company:

1. User Experience		Notes	Total	Score
Ref no.	Requirement			
1.1	Number of clicks from the Library Catalogue to reach full text			/10
1.2	How can the PDF be accessed? E.g. download, save copy and paste, print. What are the copyright vs. DRM restrictions?			/10
1.3	To what extent is the look and feel of the interface user friendly?			/10
1.4	How intuitive are the screens to navigate? E.g. between sections/chapters			/10



## TERMS 1: Get the Right Team

- ER Person
- Subject team or liaison
- Budget holder
- Faculty
- IT personnel





## 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



<http://www.flickr.com/photos/dalboz17/209945979/>



## TERMS 1: Talk to Suppliers/Vendors

- Review pros and cons with the provider
- Begin negotiation for price
- Ask for consortia pricing
- Be firm on specifications

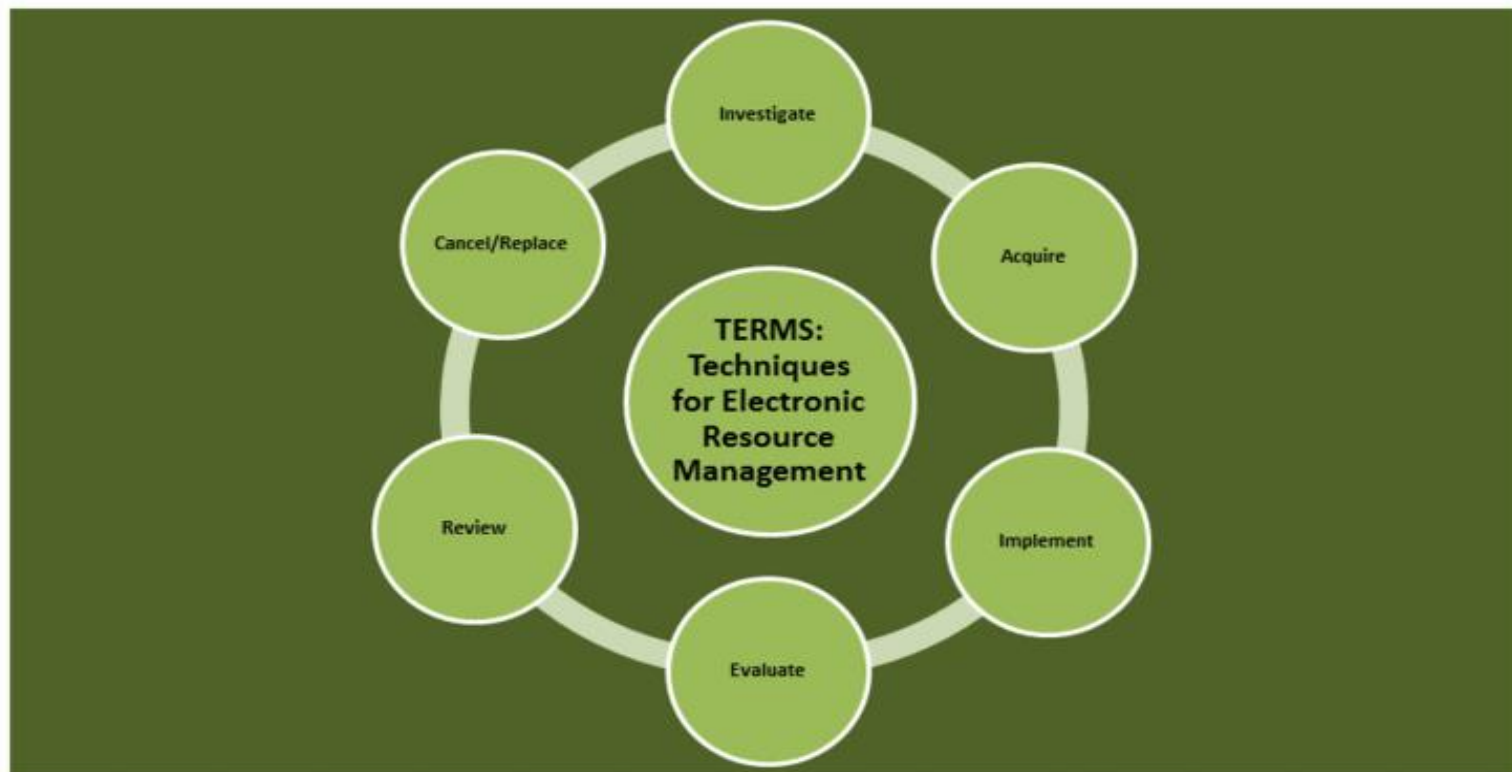


## TERMS 1: Sustainability

- What kind of resource are you buying?
- Does it need to be sustainable?
- How do you measure sustainability
  - Publisher platforms vs. aggregators
  - Post cancellation access
  - LOCKSS, CLOCKSS or Portico



# TERMS 2: Acquisition



## 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 2: License Review

- **Have changes incorporated into a “clean copy”**
- **Always make sure to have an out-clause**
- **Re-read entire document**
- **Pay close attention to addendums**

**“In the case of a significant decline in financial support to (X library) by their main funding source, (X library) reserves the right to cancel significant portions and potentially cancel this subscription with 30 day notification.”**





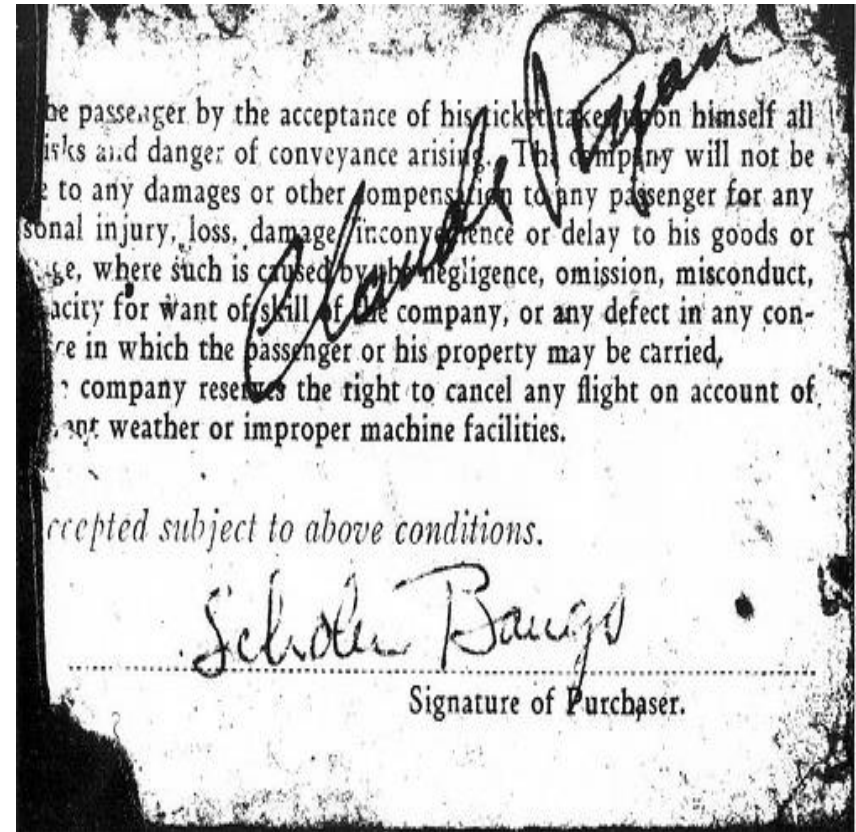
## TERMS 2: Re-negotiate license as needed

- **Negotiation lasts up until signature**
- **Do not be afraid to pick up the phone**
- **Do not feel pressured/rushed by demanding patrons/faculty**



## TERMS 2: Signing Authority

- Know your signing authority/signatory at your organization
- Do not feel obligated to pursue products/resources signed for by others on campus



## TERMS 2: Record Administrative Metadata

- **Payment terms/time periods of access**
- **License terms**
- **Funding sources**
- **Provider & contact information for troubleshooting**



## TERMS 1&2: Hands-on activity

Product:

Company:

Patron Driven Acquisition – supplier platform review

1. User Experience		Notes	Total	Score
Ref no.	Requirement			
1.1	Number of clicks from the Library Catalogue to reach full text			/10
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1.4	How intuitive are the screens to navigate? E.g. between sections/chapters			/10



## TERMS 1&2: Hands-on activity

- **Top fourteen deal breakers for academic institutions**
  1. **Definition of site**
  2. **Definition of users**
  3. **Remote access**
  4. **Access should be IP**
  5. **Ability to provide access and connectivity to other resources**
  6. **Indemnification should be mutual**
  7. **Restrictive privacy clauses**
  8. **Usage statistics**
  9. **Content transfer**
  10. **Third party discovery tools**
  11. **Loss of funding out clause.**
  12. **Venue should be applicable to your location**
  13. **Ability to maintain perpetual access to content.**
  14. **Price cap allowance**



## TERMS: Morning break

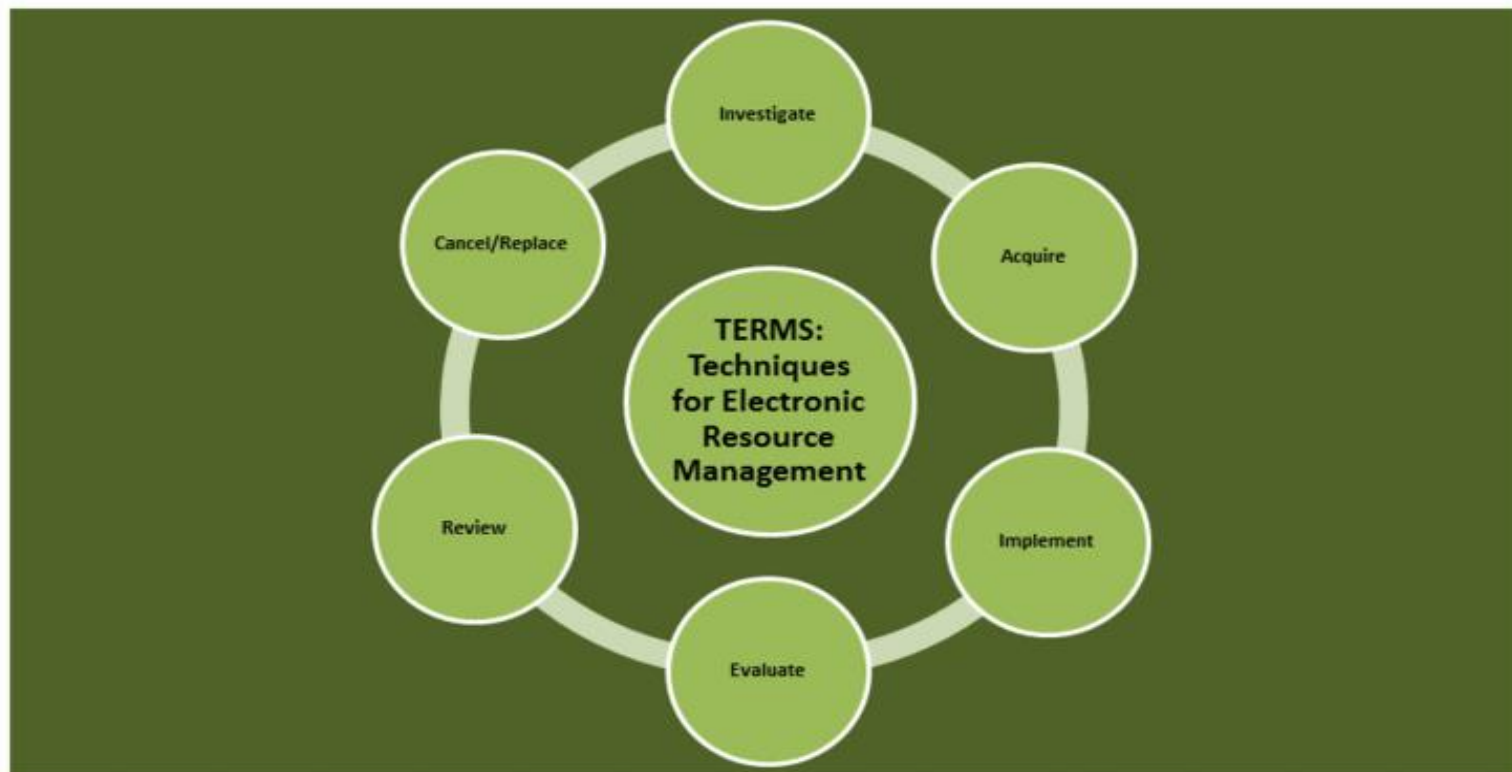


<http://www.flickr.com/photos/grahamstone/4946289210/sizes/o/in/photostream/>

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# TERMS 3: Implementation



## TERMS 3: Implementation

- **Test**
- **Market**
- **Train and Document**
- **Do a Soft Launch**
- **Assess Feedback**
- **Launch**





## TERMS 3: Test

- Does the URL work?
- Has authentication been set up?
  - On and off campus?
- Is it in the knowledge base/link resolver, federated search etc.
- Have other points of access been checked?
- Are there MARC records?
  - Do they need editing?



[http://farm7.staticflickr.com/6201/6073263569\\_00d3508d7a\\_o\\_d.jpg](http://farm7.staticflickr.com/6201/6073263569_00d3508d7a_o_d.jpg)



## TERMS 3: Marketing plan

- Essential to have a marketing plan of some sort
- Who are the main group(s) of users?
- Have they been told?



<http://www.flickr.com/photos/18946008@N06/2220871410/>



## TERMS 3: Train and document

- Use the free training
  - You've paid for it
  - Webinars
  - Face to face training
  - Train the trainer
  - Documentation
- Libguides

The screenshot shows the University of Huddersfield Library LibGuides website. The header includes the university logo and the text "The Library". Below the header, there is a navigation bar with "Library" and "LibGuides" links, and a search bar. The main content area is divided into several sections: "Guides" with a list of featured guides, "Subjects & Librarians" with a list of subjects, "Tags" with a list of tags, "Receive Email Updates" with a registration link, and "Featured Librarian" with a photo of a librarian. The website is designed with a blue and green color scheme.



## TERMS 3: Soft launch

- A short lead in time may create problems down the line
- Depending on the scale and type of resource
  - PDA may only be a soft launch
  - A platform may a soft launch to gather feedback
  - A new system may need alpha and beta stages



[http://www.flickr.com/photos/seven\\_resist/7522567846/](http://www.flickr.com/photos/seven_resist/7522567846/)



## TERMS 3: Assess Feedback

- After soft launch or between acquisition and feedback
  - Questionnaires
  - Surveys
  - Focus Groups etc.
- Compare this to evaluation in TERMS 4

Summon feedback - Mozilla Firefox

library.hud.ac.uk/perl/summon/summon\_feedback.pl

Type of feedback: General Feedback

Description:

How likely would you be to recommend this search service to a friend or colleague?

Definitely  Very likely  Maybe  Not very likely  Never

Email  (optional)

submit



## TERMS 3: Launch

- Depending on the scale and type of resource
  - Timing is important regardless
  - Subscriptions: as soon as the guides are ready
  - Major changes at the beginning of an academic year?
- Check the marketing plan
  - Who is your audience?



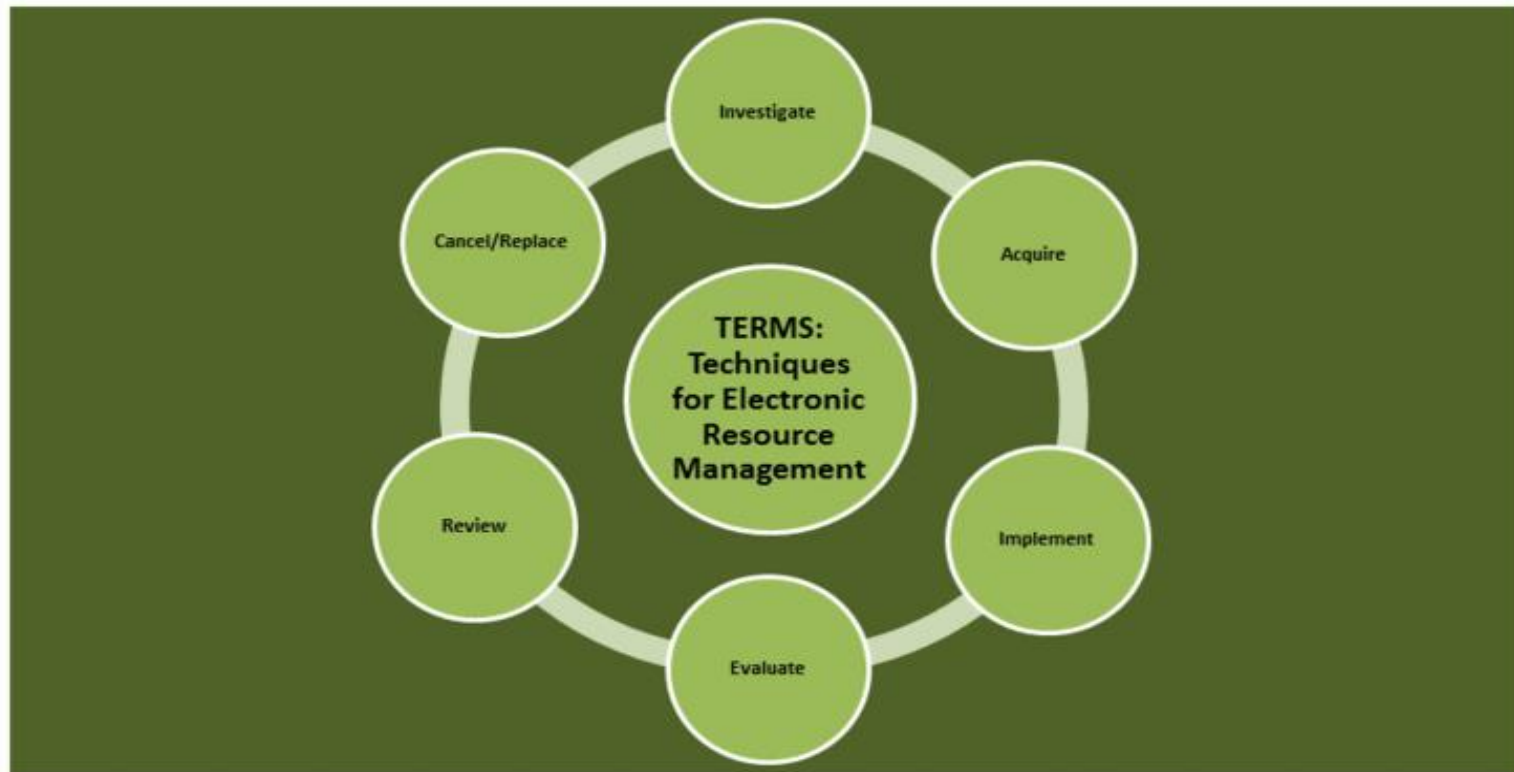
## TERMS 3: Hands-on activity

**Marketing Matrix:** Enter actions, responsibilities and timings into the appropriate boxes.  
 You are encouraged to modify this table to suit your needs.  
 You are not expected to use all the boxes. If you prefer, list the actions in the Appendix and put their numbers in the matrix.

Marketing channel	Customer group	Undergrads and taught postgrads, part-time and full-time.	Academics and researchers	Support staff including library staff	Partner Colleges	Potential members of the University (staff and students)	Members of the public, including visitors and professional community	Users with disabilities
Website								
Plasma screens								
Email messages								
Text messaging								
VLE								
Within school/service e.g. posters, roadshow								
Information skills training								
Student inductions								
Staff induction								



# TERMS: Morning wrap-up





## TERMS: Morning wrap-up

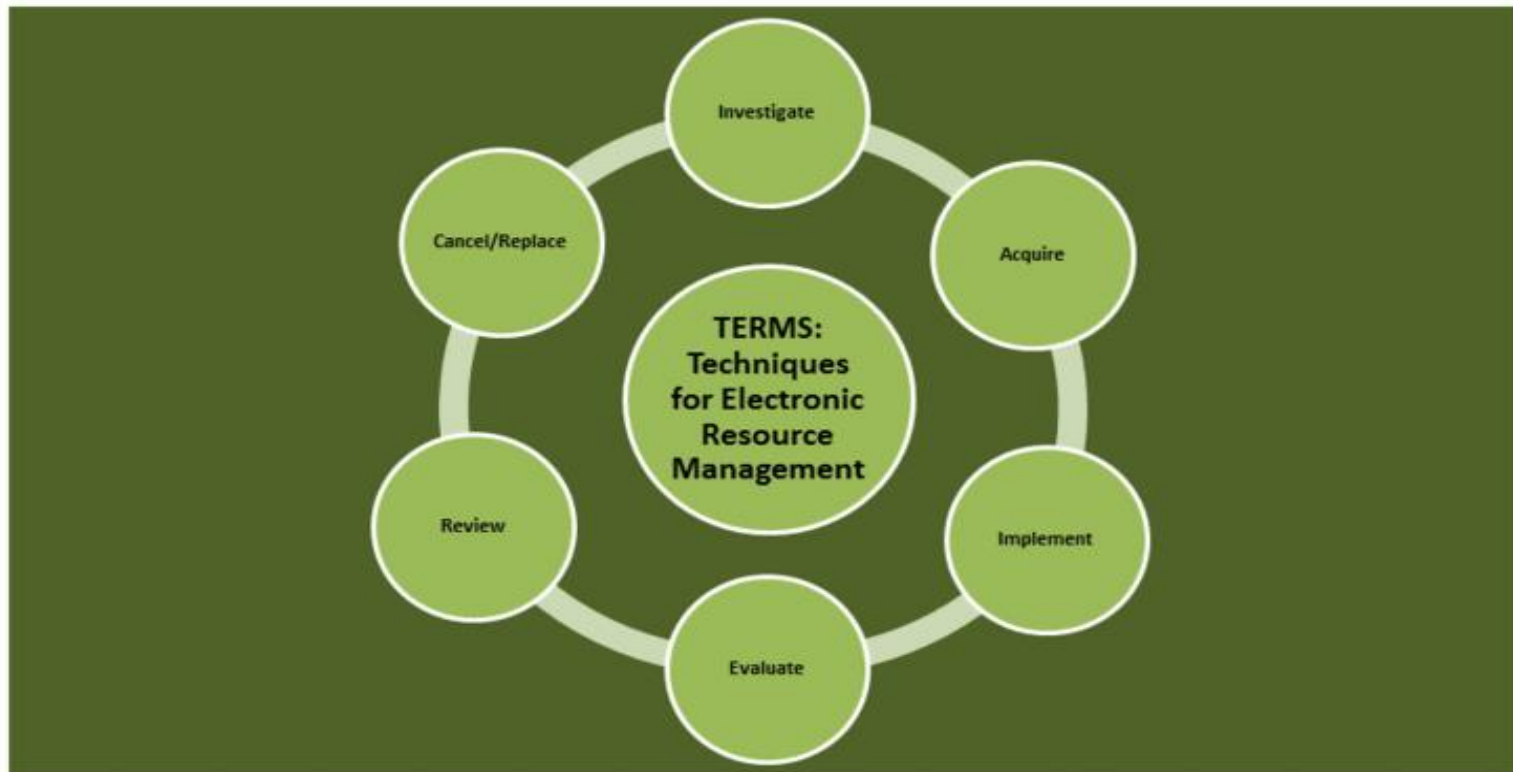
- o Any questions before lunch?



Thanks to Char for the photo!  
<http://www.flickr.com/photos/kstatelibrarian/9050728837/sizes/o/in/photostream/>



# TERMS 4: Ongoing Evaluation & Access



## 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**



## TERMS 4: Types of evaluation

- **COUNTER stats**
- **Impact Factors**
- **Altmetrics**
- **Web page stats, discovery stats, OpenURL stats**
- **User feedback**



## TERMS 4: Check the implementation

- Around 1 month in...
  - Check the access points including remote access
- ...then afterwards on a monthly, quarterly or half yearly basis



<http://www.flickr.com/photos/vestman/3871170258/>



## TERMS 4: Ask your users

- Use evaluation tools such as:
  - LIBQUAL+, National students Survey results (UK) or other survey techniques
- Record comments and access queries
  - Comments pages
  - Emails
  - Student panels



<http://www.flickr.com/photos/gabenl/2617316249/>



## TERMS 4:

### Changes to coverage/platform migration

- Annual content migration
- A&I fulltext databases
- Tools from jisc:  
<http://adat.crl.edu/>
- Tools from CUFTS:  
<http://cufts2.lib.sfu.ca/MaintTool/public/compare>



## TERMS 4: Track Downtime/Availability

- **Publisher reported**
- **Patron reported**
- **Spot checks**





## TERMS 4: Communicate with the vendor

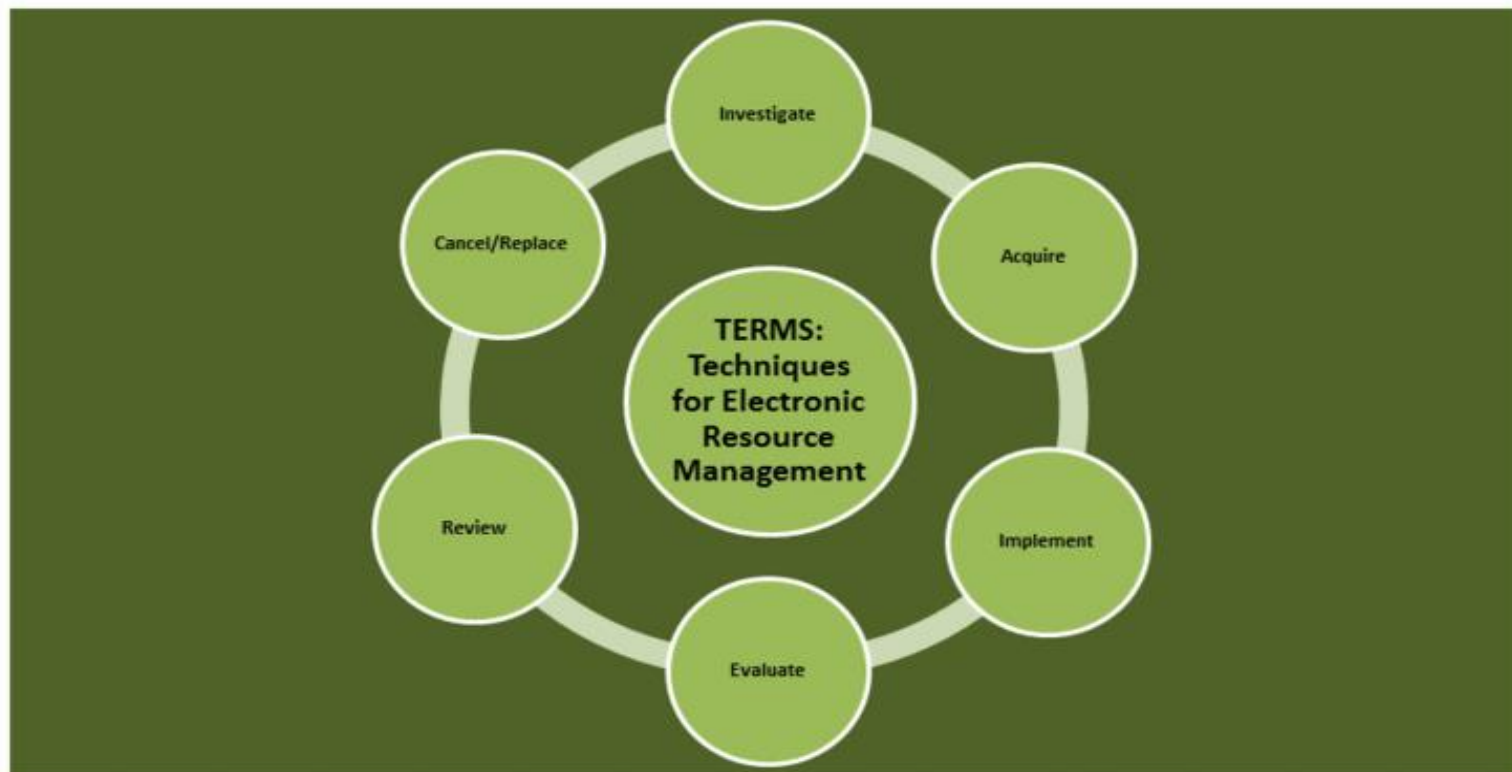
- **Keep a dossier of correspondence**
  - Problems, troubleshooting etc.
- **Talk to the community**
  - Listservs
  - Shared notes on KB+ or consortia pages
- **User Groups**
  - Find out if there is one
  - Talk to colleagues at regional and national meetings
  - Feed back ideas



<http://www.flickr.com/photos/lenore-m/467996341/>



# TERMS 5: Annual Review



## 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:** **Confirm costs**

- **Statements**
- **Renewal Notices**
- **Upgrade access**
- **Content upgrade**
- **Multi-year options**



## TERMS 5: Usage Statistics

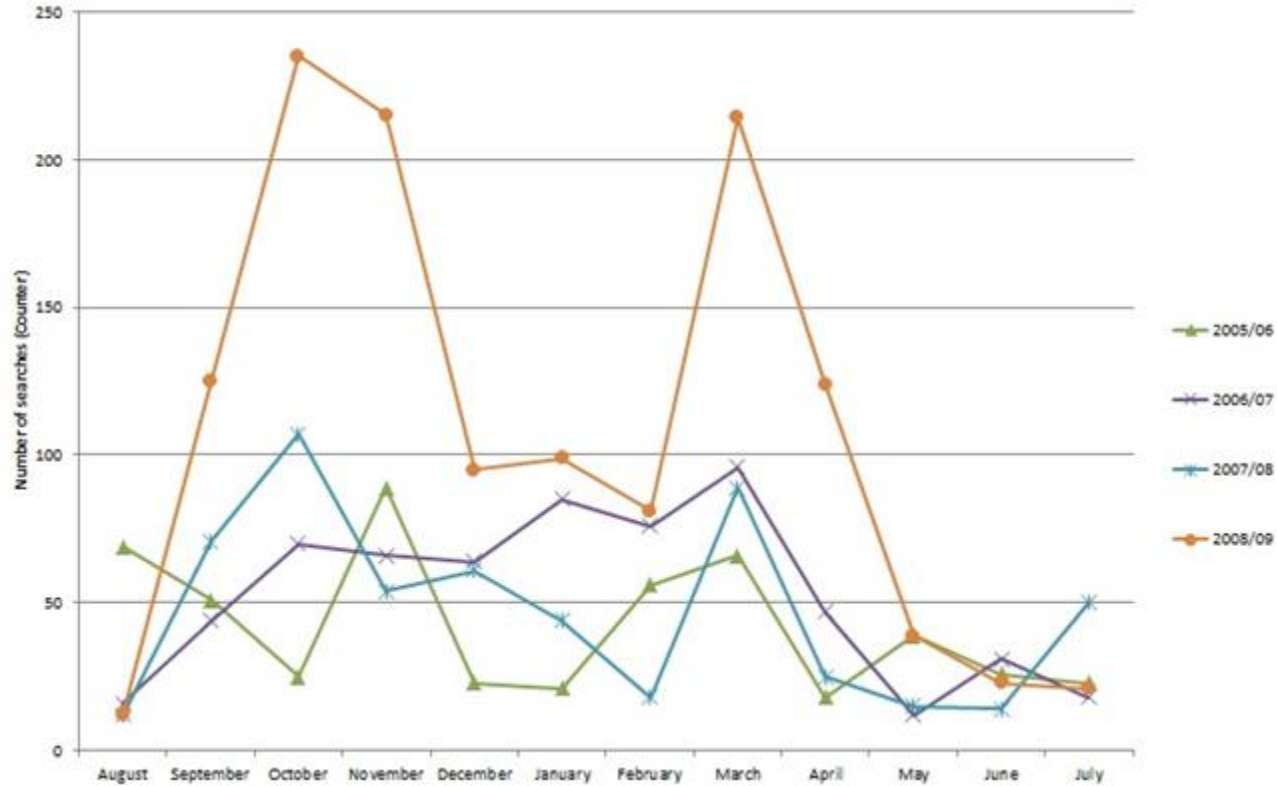
- Need to contextualize
- Multi-year statistics works better
- Raw COUTNER data is confusing

	C	D	E	G	H	I	J	K	L	M	N	O	P	Q
1	Title	Vendor	Provider/Platform	Call #	2011 Costs	2012 Costs	2013 Costs	Cancel \$	Transfer \$	Impact Factor	Eigenfactor AI	SNIP	Usage 2011	Cost per Use
2	American journal of clinical nutrition	s-eb	Highwire	RC584_A5	\$508.13	\$534.05	\$560.75			N/A	2.2715	3.107	Asked for	N/A
3	American journal of epidemiology	s-eb	Oxford Journals	RA421	\$725.90	\$762.19	\$800.30			N/A	2.4403	2.519	313	\$2.31
4	American journal of health behavior	s-eb	Academic Search Complete, Academic OneFile, IngentaConnect,	RA421_H4184	\$246.81	\$246.81	\$259.15			1.572	0.5677	1.707	34	\$7.21
5	American journal of health promotion	s-eb	highwire	RA427_8_A43	\$372.28	\$372.28	\$390.89			2.642	0.8968	0.88	195	\$1.91
6	Clinical gerontologist	s-eb	Taylor & Francis Online	RC451.4_A5_C524	\$1,075.37	\$1,005.89		\$1,056.18		1.151	0.304	0.421	7	\$153.61
7	Conn's current therapy	ybp		RM101_C87	\$89.96	\$89.96		\$94.46		N/A	N/A	N/A	0	\$89.96
8	Critical public health	s-eb	Academic Search Complete, Taylor & Francis Online,	RA421_C754	\$630.50	\$590.05	\$619.55			N/A	N/A	0.677	9	\$70.01
9	Ethnicity & disease	s-eb	Single Journals	RA652_E88	\$144.66	\$141.55	\$148.63			N/A	0.4208	0.339	0	\$144.66
10	Health education research	s-eb	Education Full Text, Oxford Journals	RA440.5_H43	\$988.26	\$1,082.63	\$1,136.76			2.633	0.8713	1.439	313	\$3.11
11	International journal of health services	s-eb	MetaPress	RA421_149	\$416.87	\$445.91	\$468.21			1.131	0.4568	0.716	51	\$8.11
12	International journal of sport nutrition and exercise metabolism	s-eb	Human Kinetics Journals	RC1235_I515	\$462.50	\$485.32	\$509.59			N/A	0.5434	1.295	1245	\$0.31
13	International quarterly of community health education	s-eb	MetaPress		\$416.87	\$416.87	\$437.71			N/A	N/A	0.049	21	\$19.81
14	Journal of aging and physical activity	s-eb	Human Kinetics Journals		\$362.95	\$381.62	\$400.70			2.144	0.604	1.109	89	\$4.01
15	Journal of infectious diseases	s-eb	JSTOR, Academic Search Complete, Oxford Journals	QR1_J65	\$739.38	\$759.73	\$797.72			N/A	2.3456	0.109	54	\$13.61

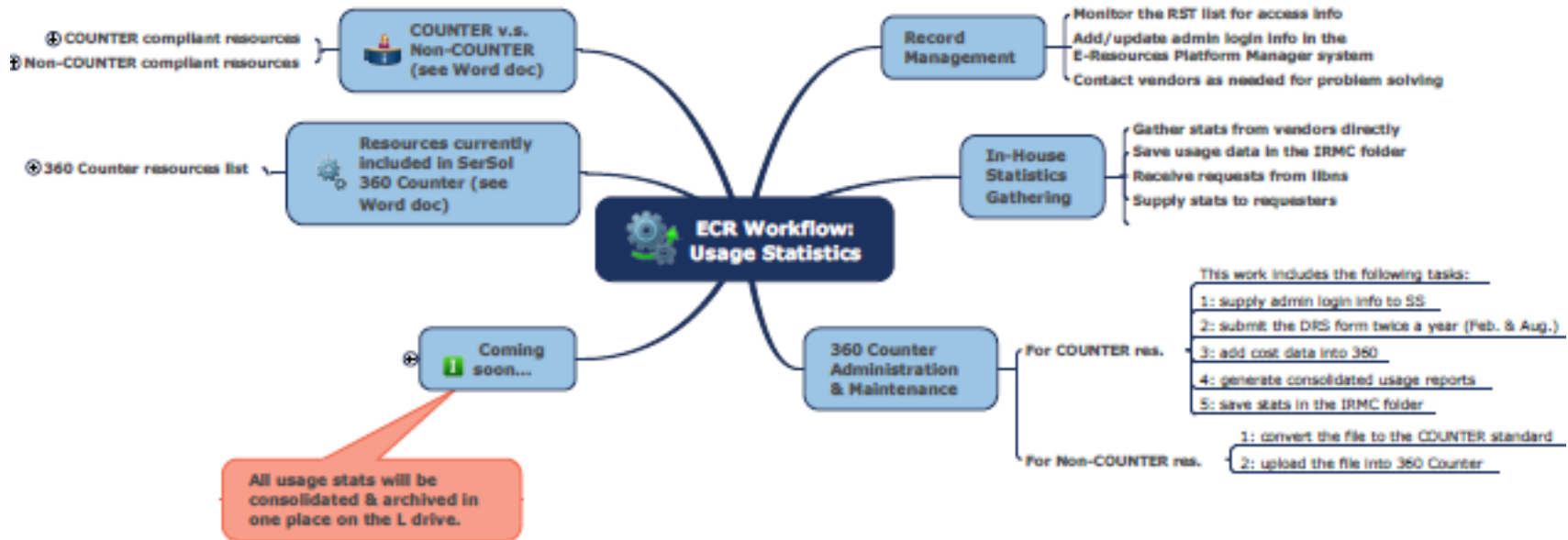


## TERMS 5: Example of resource report

Usage:



## TERMS 5: Example of usage workflow





## TERMS 5: **Make choice/renegotiate or cancel**

- **Talk to provider**
- **Renegotiate**
- **Process renewal**
- **Cancel**

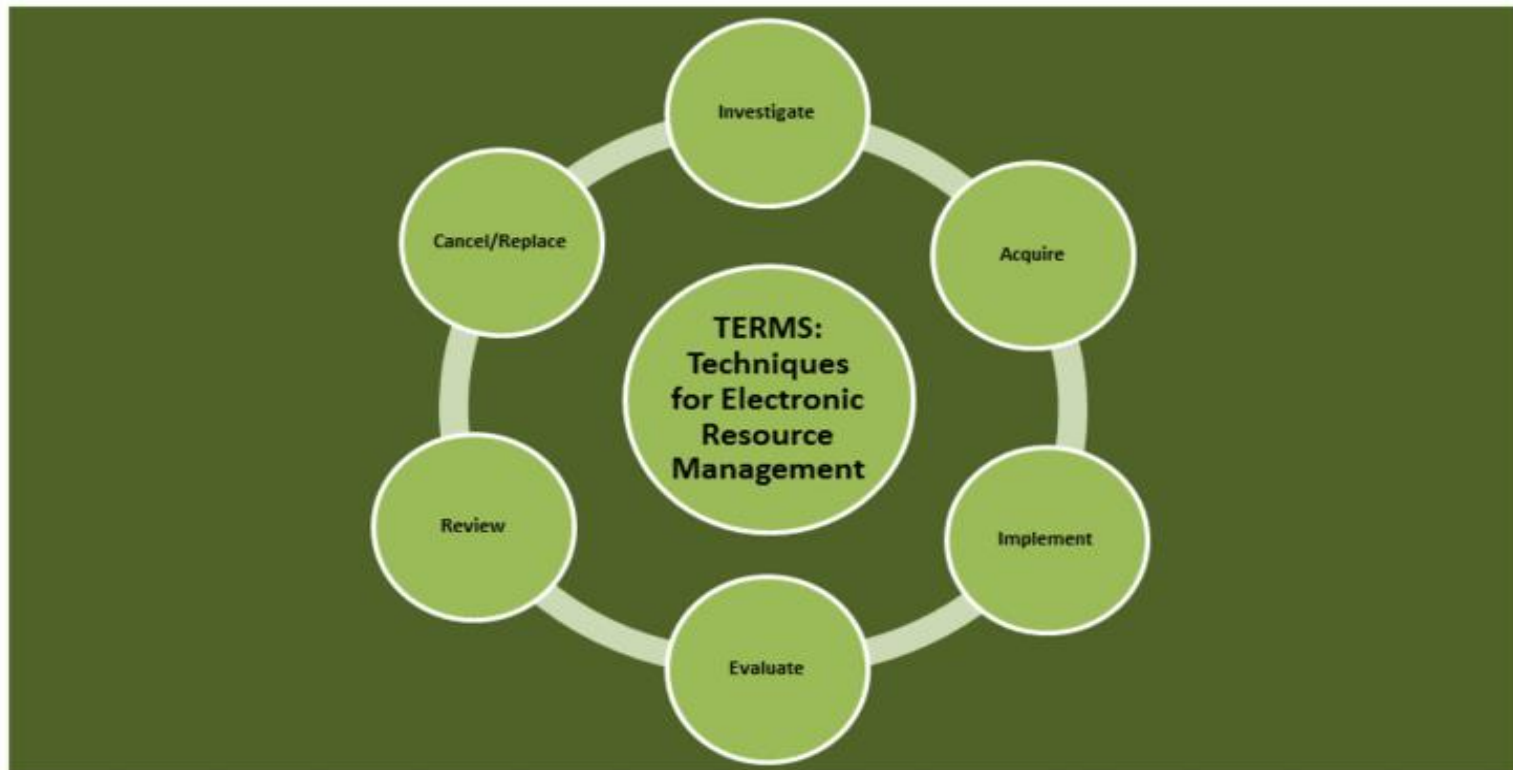


## TERMS 4&5: Hands-on activity

	C	D	E	G	H	I	J	K	L	M	N	O	P	
1	Title	Vendor	Provider/Platform	Call #	2011 Costs	2012 Costs	2013 Costs	Cancel \$	Transfer \$	Impact Factor	Eigenfactor AI	SNIP	Usage 2011	
2	American journal of clinical nutrition	s-eps	Highwire	RC584 .A5	\$508.13	\$534.05	\$560.75			N/A		2.2715	3.107	Asked for
3	American journal of epidemiology	s-eps	Oxford Journals Academic Search Complete, Academic OneFile, IngentaConnect,	RA421	\$725.90	\$762.19	\$800.30			N/A		2.4403	2.519	313
4	American journal of health behavior	s-eps	highwire	RA421 H4184 RA427.8 .A43	\$246.81	\$246.81	\$259.15			1.572	0.5677	1.707	34	
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6	Clinical gerontologist	s-eps	Online	RM101 .C87	\$89.96	\$89.96				1.151	0.304	0.421	7	
7	Conn's current therapy.	ybp	Academic Search Complete, Taylor & Francis Online,	RA421 .C754	\$630.50	\$590.05	\$619.55		\$94.46	N/A	N/A	N/A	0	
8	Critical public health	s-eps								N/A		0.677	9	
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12	International journal of sport nutrition and exercise metabolism	s-eps	Human Kinetics Journals	RC1235 .I515	\$462.50	\$485.32	\$509.59			N/A		0.5434	1.295	1245



# TERMS 6: Cancellation & Replacement



## TERMS 6: Cancellation & Replacement

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



## TERMS 6: Consult with stakeholders

- **Get the wider view**
  - **Share your reasons for the decision**
- **If there is a vocal minority**
  - **Talk to the Dean**
  - **Review board**
- **Include usage reports and other access issues**
- **Discuss post cancellation rights**



[http://farm1.staticflickr.com/10/16427383\\_3dfe49724c\\_o.jpg](http://farm1.staticflickr.com/10/16427383_3dfe49724c_o.jpg)



## TERMS 6: **Notify provider/vendor**

- **Inform the vendor as soon as possible**
- **Explain why you are cancelling**
  - **Let them know if it is down to cost**
  - **You may get a better deal!**
- **Don't burn you bridges!**
- **Understand you post cancellation rights**



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## TERMS 6: **Notify patron base**

- **Annotate holdings records**
- **Provide a cancellation list**
- **Do this in advance to give your patrons notice and allow them to remove notes and saved searches**
- **Offer alternatives if possible**



[http://farm1.staticflickr.com/39/99309944\\_99d41e4802\\_o.jpg](http://farm1.staticflickr.com/39/99309944_99d41e4802_o.jpg)



## TERMS 6: Notate records

- Mark the items in you ILS, ERM etc.
  - Reason for cancellation
- Review post cancellation
  - To ensure there are no dead links
  - Titles often re-appear
- If cancelled in advance
  - Set up a reminder to cancel access



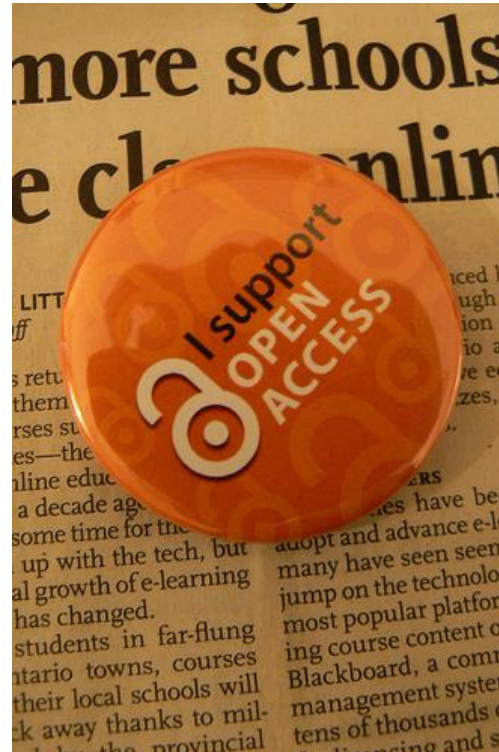
[http://farm6.staticflickr.com/5179/5430939866\\_f2f01afe40\\_o.jpg](http://farm6.staticflickr.com/5179/5430939866_f2f01afe40_o.jpg)





## TERMS 6: Explore OA Options

- DOAB
- DOAJ
- Digital Humanities Now
- University Presses
- Repository Publishing



<http://www.flickr.com/photos/24343741@N06/4049306395/>



## TERMS 6: Evaluate replacement options

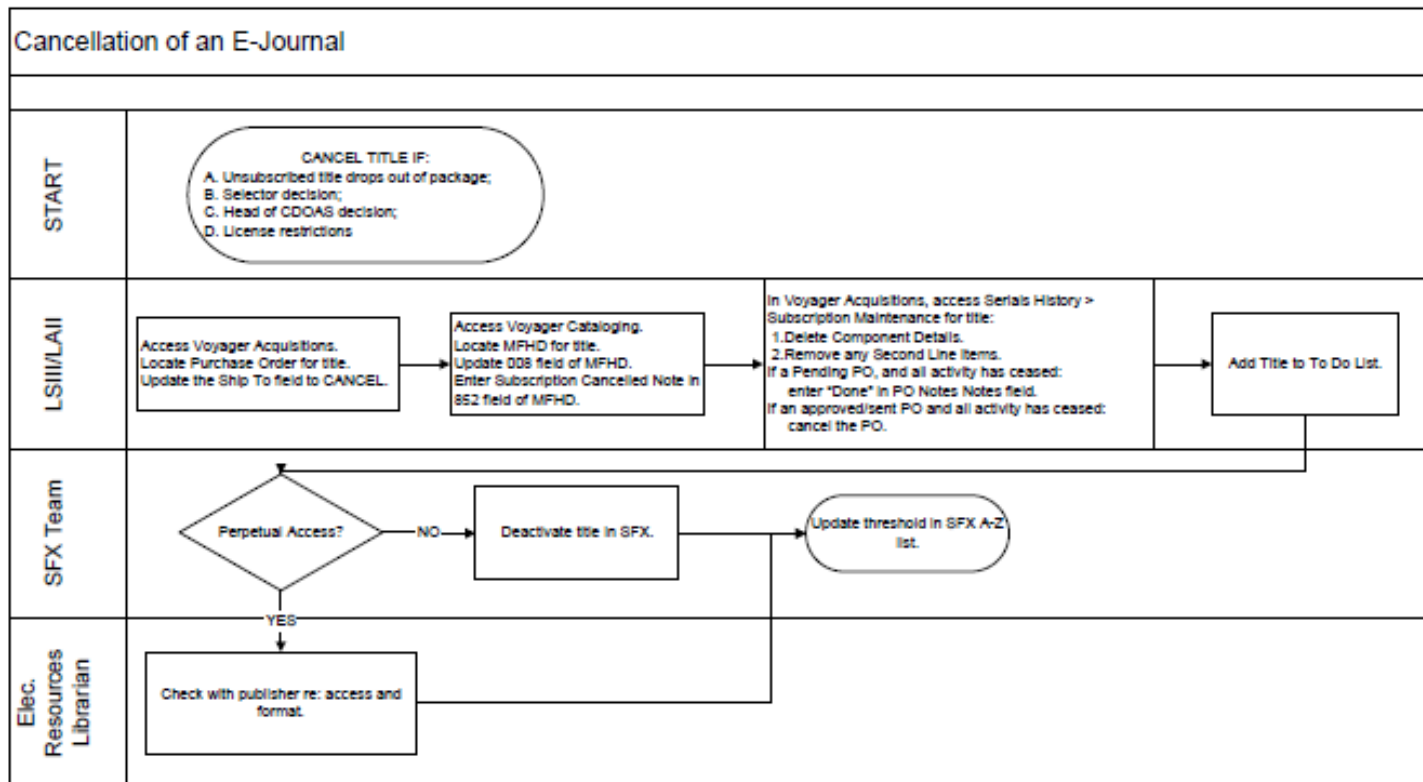
- o Now start all over again!



[http://farm5.staticflickr.com/4089/5187736495\\_b2cf3087f7\\_o.jpg](http://farm5.staticflickr.com/4089/5187736495_b2cf3087f7_o.jpg)



## TERMS 6: Hands-on activity



Shared by staff at Texas A&M University



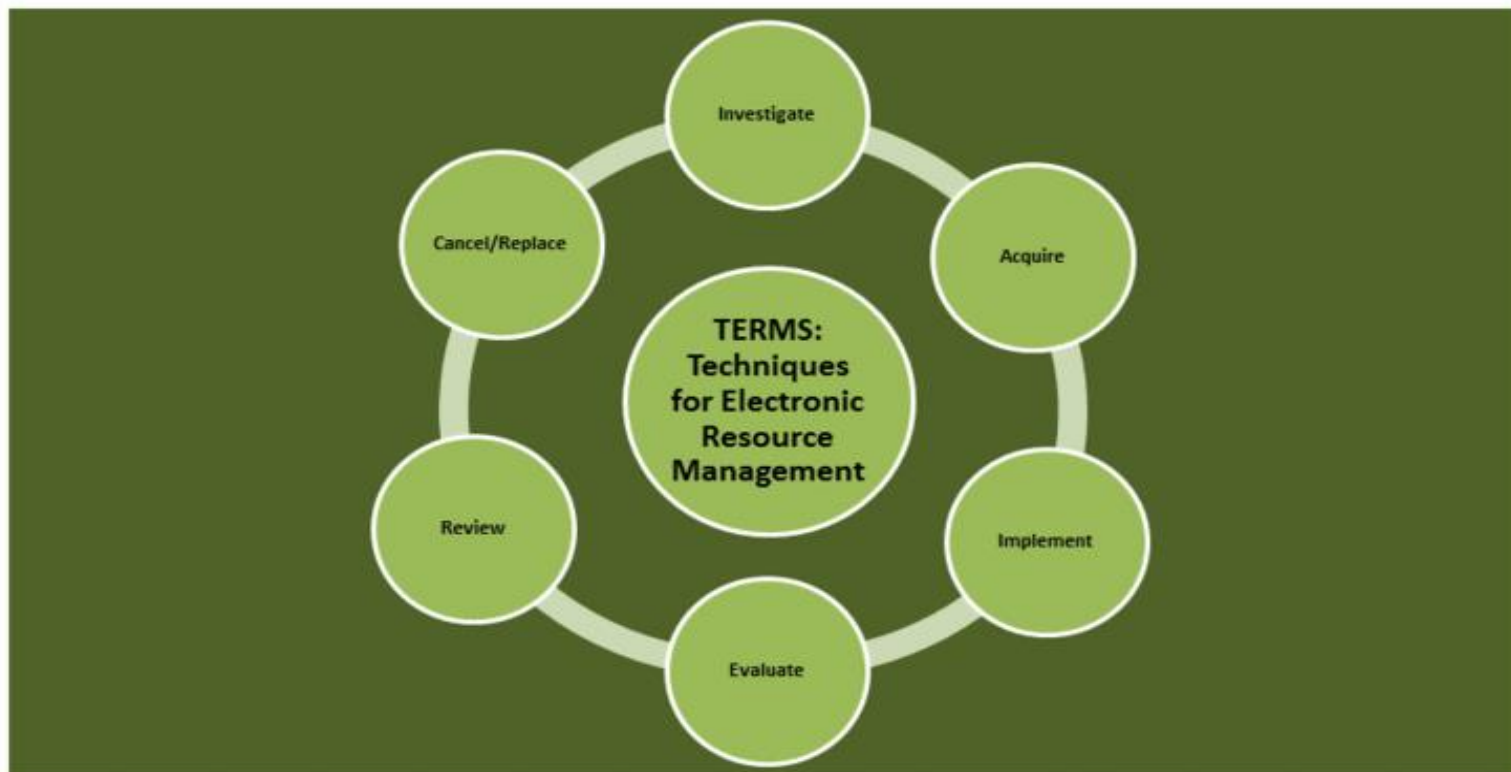
## TERMS: Afternoon break



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# TERMS: Looking forward



## TERMS: **Workflow Developments**

- We hope you can further develop this back at your home institution
  - Talk about these workflows with your team
  - Identify the pressure points in the system
- To help you manage the change needed to adopt to new systems and work practices

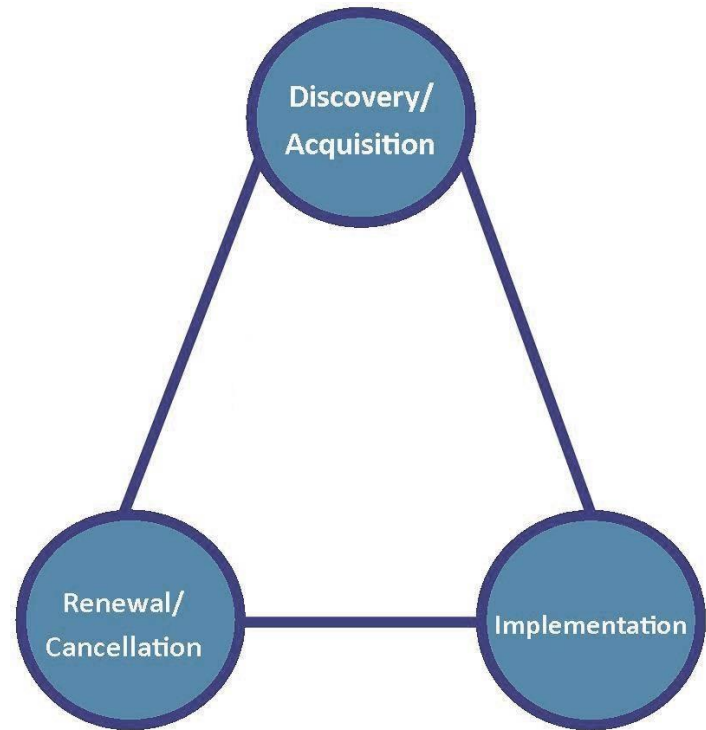


[http://farm9.staticflickr.com/8384/8528610850\\_3863e64a35\\_o.jpg](http://farm9.staticflickr.com/8384/8528610850_3863e64a35_o.jpg)



## TERMS: **Alternative workflows**

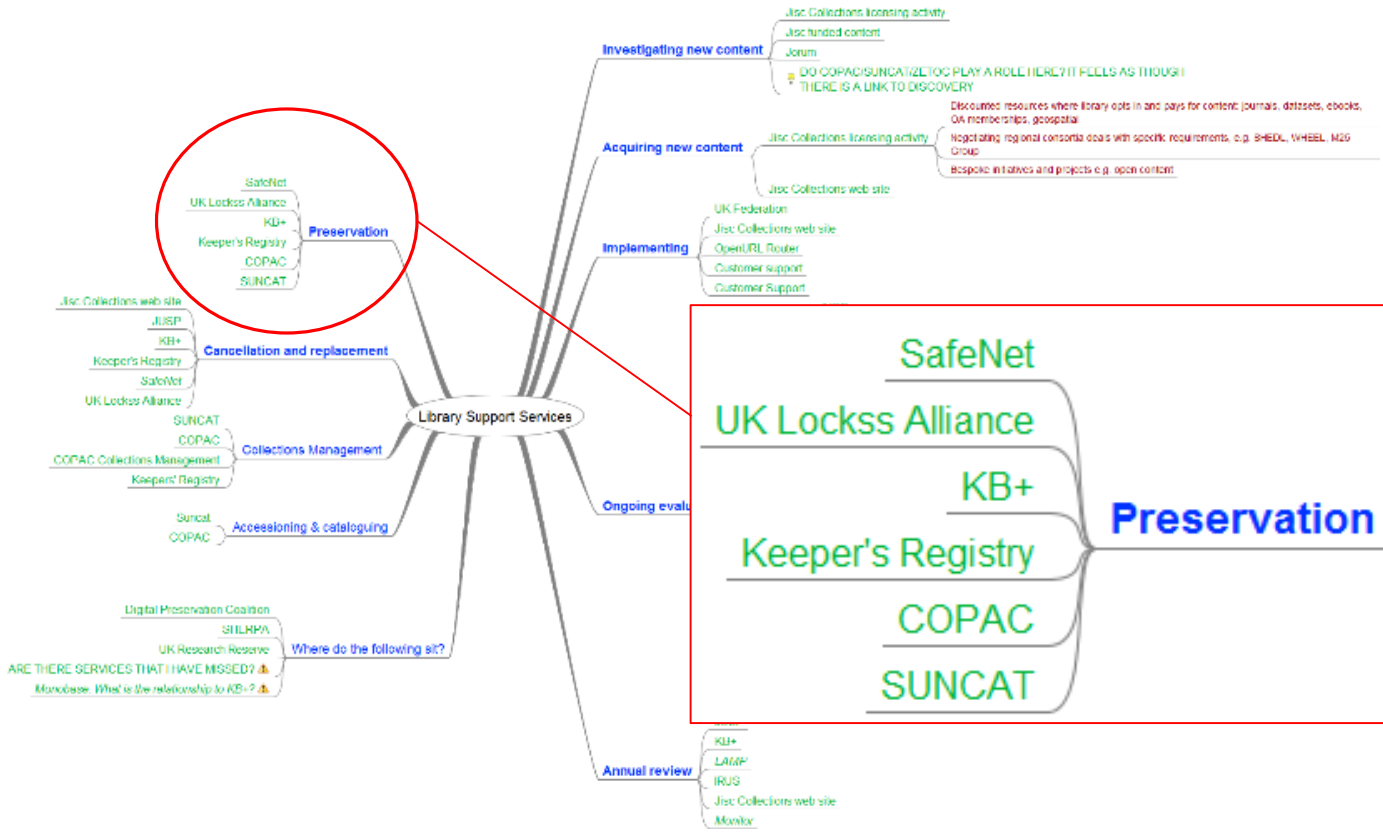
- You can merge some of the 6 TERMS to suit your needs
  - Huddersfield merges 1&2 and 4&5 for some workflows
  - Stetson University College of Law goes one stage further



Thanks to @blawndlibrarian at Stetson University College of Law



## TERMS: Alternative workflows



Thanks to Liam Earney at Jisc Collections





## TERMS 7: Preservation?

- Is preservation/post cancellation an issue?
- What happens if a database is cancelled?



<https://www.flickr.com/photos/respres/2645346053>

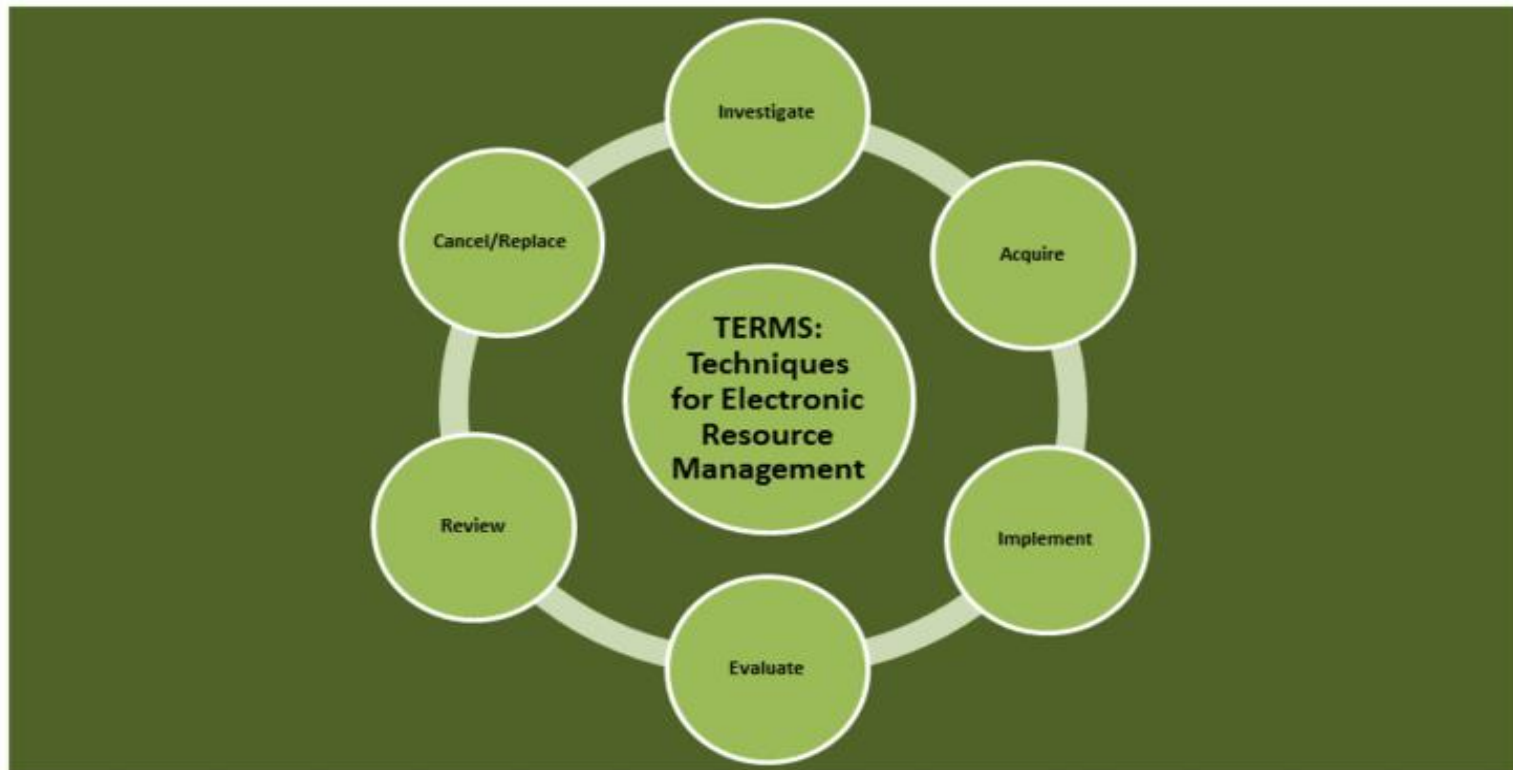


## Techniques in E-Resources Management

- TERMS 1
  - Investigating New Content for purchase
- TERMS 2
  - Acquiring New Content
- TERMS 3
  - Implementation
- TERMS 4
  - Ongoing Evaluation and Access (**incl. annual review**)
- TERMS 5
  - **Cancellation and Replacement Review**
- TERMS 6
  - **Preservation**



# TERMS: Afternoon wrap-up



## Future Considerations

- E-Book Management
- New Forms of Scholarship
- Article Publishing
- Article Processing Charges
- Next-Gen Library Management Systems/Library Service Platforms
- Web Scale Management
- Workflow Versions



<http://www.flickr.com/photos/chrisinplymouth/4408009361/>





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<http://dx.doi.org/10.1108/01604951211243506>.
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<http://dx.doi.org/10.1080/0361526X.2011.591042>.



This presentation: <http://eprints.hud.ac.uk/17790>



## TERMS: Afternoon wrap-up

- o Any further questions?



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