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Techniques in Electronic Resource Management (TERMS)

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Techniques for Electronic Resource Management

Two decades after the advent of electronic journals and databases, librarians are still grappling with ways to best manage these resources in conjunction with their print resources. In addition, economic pressures at many institutions of Higher Education are resulting in librarians having to justify their spending on collections and resource management. Furthermore, ebooks are becoming yet another stream of purchasing and management with the added complexity of patron driven acquisitions. All of these issues result in the need to codify the management of electronic resource management more than ever.

Cancellation and replacement review

- With ever-changing program offerings and a shift in usage of resources, some resources will need to be cancelled.
- Once the decision has been made to cancel and replace a resource, notify the patrons of the change.
- Begin evaluation of replacement product and do not

Techniques for Electronic Resource Management (TERMS) is a project to encourage open peer commentary and crowd sourcing of areas of best practice for each of the stages of the e-resources lifecycle.

Investigating new content for purchase/addition

- Standard rules applied to print acquisition are no longer sufficient.
- The selection of purchasing models in themselves now play a role in how and why specific content is selected for inclusion with any given collection of library material.
- Some basic guidelines to consider when making selections decisions for content:
 - Know what you want to achieve
 - Write your specification document
 - Get the right team
 - Desk top review of market/ literature and trial set up
- Talk to suppliers/vendors
- Making your choice



The project aims to become a reference point for those who are new to e-resource management and for those who may want to implement its recommendations of best practice.

Discussion

Do LIBER delegates agree with what we have found?

Does what we have said relate to e-books?

Would you be willing to share your local workflows on e-resources management?

What are your experiences?

Tell us about your areas of best practice and help us refine TERMS for others to use.

Acquire new content

- Acquiring resources once they are selected can be very straight forward or very complicated depending upon the resource to be purchased.
- The following acquisitions steps usually occur when acquiring new content and services:
 - Comparing specifications
 - Negotiate terms of contract and purchasing

forget that there may be Open Access alternatives.

The next phase is then to start the process all over again...

Annual review

- In times of fiscal constraint it is very important to make sure all resources, whether established or recent acquisitions are providing value for money.
- Value for money can be calculated in a number of ways, the most obvious being cost per download, other factors should be taken into account, such as:
 - Renewal date Currency exchange rate
- Usage
 Transferred/added titles
- Access queries Coverage changes
- License changes Cancellation policy
- Pricing model % price increase
- Compile a report for your staff; it is not enough to compile a report of raw data, give subject teams a background to the usage of the resource and check key performance

indicators in order to allow them to make quick and accurate decisions on what to do next.



TECHNIQUES FOR

Electronic Resource Management

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- Re-negotiation of licensing terms
- Signing of the agreement
- Record administrative metadata



Implement

- Any new e-resource will need to be implemented, while this maybe relatively straightforward for smaller resources, larger resources and new services may take a few months to get just right.
- No matter how big the resource, it will need to be tested and set up in order to embed it into the collection.
- Training and awareness sessions for staff and users will help, as will a definite launch date that can be used to market the new resources to the intended audience.



Evaluation and ongoing access

- Many resources take a year before they become embedded into the curriculum or research process and user feedback may not be positive from the onset of provision.
- The best evaluation of a product or service happens within a three to five year time frame.
- Track downtime/availability by saving email alerts/

Contact TERMS

TERMS Blog (with the latest comments and updates, e.g.from the ER&L Conference in the USA)



http://6terms.tumblr.com

messages from the producer of scheduled downtime/ maintenance and tally these up annually.

 Keep a file on each resource provider that includes all pertinent correspondence that has occurred along with notifications of routine maintenance, and specific troubleshooting problems that have arisen.



Join in the discussion with over 150 members in our Facebook group (Group: TERMS)



http://twitter.com/#!/6terms

Follow the discussion on Twitter, we have over 130 followers



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