MANAGING & IMPLEMENTING LICENSE AGREEMENTS FOR ELECTRONIC RESOURCES PART II

September 5, 2018

Part 3 of Licensing Electronic Resources to Serve the Library's Mission

JENNIFER BAZELEY

Coordinator, Collection Access & Acquisitions

Miami University (Ohio) Libraries





MIAMI UNIVERSITY & LIBRARIES

- Ohio public university / residential
- Liberal ed / primarily undergraduate
- FTE 24,500 (5 campuses)
- Databases 510
- E-journals 284,000
- E-books 728,000
- Materials budget \$4,100,000

- III Sierra / EBSCO ERM & Discovery
- Library staff 42 paraprofessional / 44 professional
- Consortial memberships
- Library administration
- Procurement / General Counsel
- Accessibility decree

COORDINATION

E-RESOURCES LIBRARIAN

UNIVERSITY

- Accessibility staff
- General counsel
- IT staff
- Purchasing / procurement / accounts payable

LIBRARY

- Budget assistant(s)
- ILL staff
- Patrons / end users
- Scholarly communication coordinator
- Public services staff / librarians
- Systems staff
- Tech services staff / librarians

EXTERNAL

- Consortia
- Subscription agents
- Vendors / publishers

ACQUISITIONS PERSPECTIVE

- Timelines and deadlines
 - Fiscal versus calendar year
 - Renewal workflows
 - Multi-year licenses
- Big deals and/or consortial purchases
- Purchase models

FISCAL VS CALENDAR YEAR

o485777x	Last Updated: 08-22-2018				
ACQ TYPE	p PURCHASE	CODE4		RDATE	
LOCATION	onlp Internet Resource	E PRICE	\$777.12	RLOC	p SERIALS
CDATE		FORM	e ELECTRONIC	BLOC	p SERIALS
CLAIM		FUND	62mgt 62 Management	STATUS	g SERIAL LIENED
COPIES	1	ODATE	09-21-2007	TLOC	
CODE1		ORD NOTE		VENDOR	ebscp EBSCO Periodicals
CODE2		ORD TYPE	p PERIODICAL	LANG	eng English
CODE3	-	RACTION		VOLUMES	
NOTE	online starts with 2004				
INT. NOTE	T&F 2018				
INT. NOTE	SpringerNature OLD				
INT. NOTE	Palgrave OLD				
SELECTOR	Management				
VENDOR ID#	K3483530				
VEN. NOTE	Subscription includes: Health Systems (b42965391) and Journal of Business Analy	tics			

DEADLINES

FEES AND PAYMENT TERMS

"The subscriber will be invoiced by and will pay the fees set forth in ... in accordance with terms agreed upon between the Subscriber and the Agent. If the Subscriber fails to pay the full amount of the Agent's invoice on a timely basis, publisher may suspend the Subscriber's access to the Subscribed products until the unpaid amounts of such invoice are paid."

ACCOUNT SUSPENSION ALERT

Dear Sir/Madam,

Despite our previous reminder, your account continues to show an overdue balance as per the attached summary/statement.

It would be appreciated if you gave this matter your immediate attention and arrange for prompt settlement of the outstanding balance of:

Non-payment of the outstanding balance may result in your account being suspended.

To ensure a fast and accurate allocation, please quote our invoice number(s) as reference with your payment.

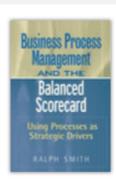
If you consider this balance as paid, please provide us with the relevant payment details to ensure prompt allocation.

If you require further information in relation to this matter, please contact us immediately.

We look forward to receiving your remittance.

Yours faithfully,

BIG DEALS / CONSORTIAL LICENSES



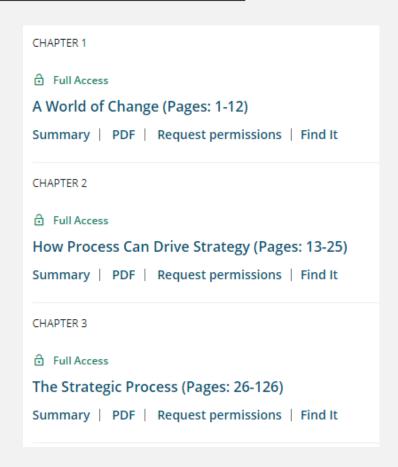
Business Process Management and the Balanced Scorecard: Using Processes as Strategic Drivers

Editors(s): Ralph F. Smith

First published: 21 August 2015

Print ISBN: 9780470047460 | Online ISBN: 9781119196921 | DOI: 10.1002/9781119196921

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PURCHASE MODELS



Title: HUMANITIES AND THE IRISH UNIVERSITY; ANOMALIES AND OPPORTUNITIES.

Author: MICHAEL O'SULLIVAN

Publisher: MANCHESTER UNIV PRESS

ISBN: 9781526112071

Binding: eBook

Content Level: ADV-AC LC Class: AZ183.I73078 2014

Subject Headings: HUMANITIES--STUDY & TEACH. (HIGHER)-- IRELAND.

YBP Interdisciplinary Topics: Higher Educational; Historical; Teaching of; Irish Studies

Approval Note: AUTH: CHINESE UNIVERSITY OF HONG KONG, STUDY OF DEVELOPMENT OF IRISH HUMANITIES EDUCATION.

Geographic Focus: Ireland; United Kingdom

Language: English

Place of Publication: MANCHESTER

Country Of Origin: UK Pagination: 179 P.

YBP Select: Research-Recommended

alt-ed slip sent GobiTween (1 Peer (2 Books/ alternate edition library activity

NON-RETURN/NON-CANCEL YBP

Supplier	Purchase Option	Library DDA	List Price	Status	Library Availability
- EBSCOhost	1 User		125.00 USD ▼	Available	Contract on file
Downloadable: Yes			Available To Consortia: No		
Date Added: 12/19/2016			Handled On Approval YBP-US: 12/28/2016		
+ EBSCOhost	3 User		156.25 USD ▼	Available	Contract on file
+ EBSCOhost	Concurrent Access (365 uses)		156.25 USD ▼	Available	Contract on file
+ EBSCOhost	Unlimited User DRM-free		187.50 USD ▼	Available	Contract on file
+ JSTOR	Unlimited User Access DRM-free		93.75 USD ▼	Available	Contract on file
+ Project MUSE	Unlimited Use DRM-free		125.00 USD▼	Available	Contract on file
+ ProQuest Ebook Central	1 User	Yes	125.00 USD▼	Available	Contract on file
+ ProQuest Ebook Central	3 User		156.25 USD ▼	Available	Contract on file
+ ProQuest Ebook Central	Non-Linear		156.25 USD ▼	Available	Contract on file
+ ProQuest Ebook Central	Unlimited Access		187.50 USD▼	Available	Contract on file

☑ Library Note: 4dd

COLLECTIONS PERSPECTIVE

- Collection development policies
- Deal-breakers
- Communicating license terms

- Accessibility
- Authentication
- Consortial licenses
- Format-specific considerations
- User restrictions

ACCESSIBILITY

"All e-learning and information technology developed, purchased, upgraded or renewed by or for the use of Miami University shall comply with all applicable University policies, Federal and State laws and regulations including but not limited to Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended, Web Content Accessibility Guidelines (WCAG) 2.0, and all other regulations promulgated under Title II of The Americans with Disabilities Act and which are applicable to all benefits, services, programs, and activities provided by or on behalf of the University."

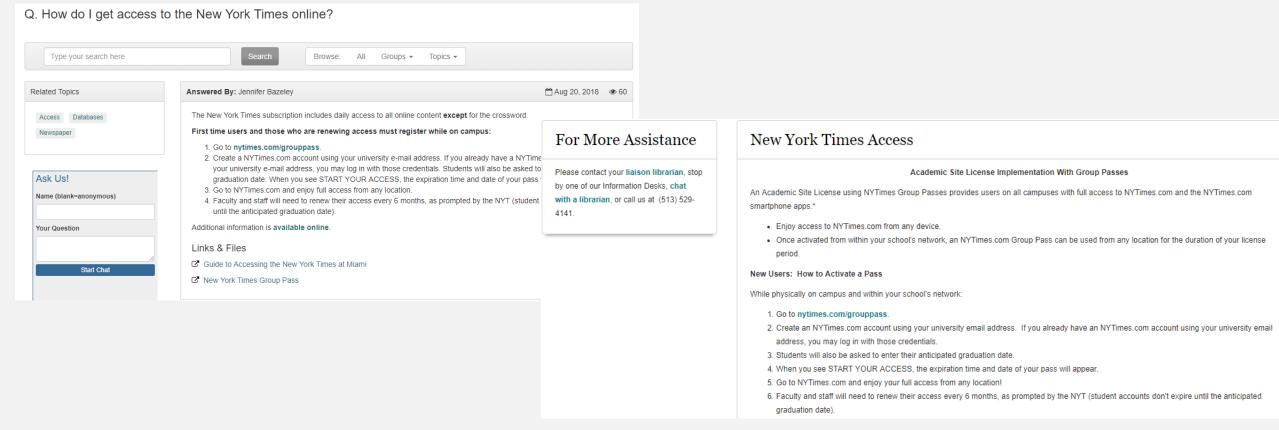
AUTHENTICATION

"I just received confirmation that yes, access would *not* be available for off-campus access, only from the *two dedicated library workstations*. You do have another option to still maintain the content on one user station for only [insert exorbitant amount here] for the year."

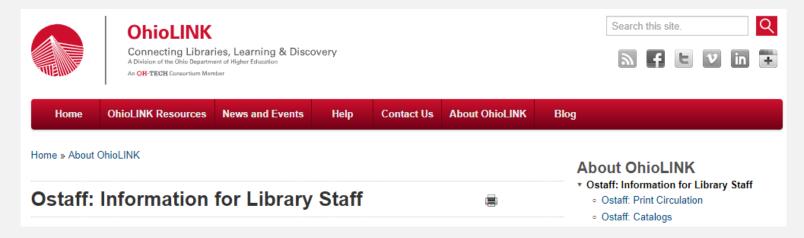


Manchester City Library via Flickr CC BY-SA 2.0

AUTHENTICATION



CONSORTIAL LICENSES





FORMAT-SPECIFIC CONSIDERATIONS

Provider	Format	Download?	# of Users	Software	Copy/Print?
Cambridge University					
Press	PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
CRC Press	PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
Credo	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
de Gruyter	ePub (book) or PDF (chapters)	yes	unlimited	browser, Adobe Reader	yes
Digitalia	HTML or PDF	yes	unlimited	browser, Adobe Reader	yes
E-Book Central	proprietary or PDF (chapter/section)	yes	1	browser, Adobe Reader	yes (limited)
EBSCOhost	proprietary or ePub	yes	1	browser, Adobe Digital Editions	yes (limited)
Elsevier ScienceDirect	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
Gale Virtual Reference Library	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
IOP E-Books	PDF (chapter, book) or ePub (chapter, book)	yes	unlimited	browser, Adobe Reader	yes
JSTOR	PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
Knowledge Unlatched	PDF (book)	yes	unlimited	browser, Adobe Reader	yes
OhioLINK EBC	HTML	no	unlimited	browser	yes
Oxford Scholarship	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
Project Muse	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
Routledge (T&F)	PDF (book)	yes	unlimited	browser, Adobe Reader	yes
Safari Tech Books	HTML	no	100 across OhioLINK	browser	yes (limited)
Salem Press	HTML	no	unlimited	browser	yes
Sage	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
SpringerLink	PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
University Press Scholarship	HTML or PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
Wiley Online Library	PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes
World Scientific Pub	PDF (chapter)	yes	unlimited	browser, Adobe Reader	yes

E-Book Info at CUP

Cambridge Core FAQs

Cambridge Core User Guides and Videos

Cambridge Core for Librarians

Cambridge Core EBooks Accessible to MU Users

CUP E-Books

Cambridge University Press e-books are on the Cambridge Core platform.

Source: Miami

Lease or Own: Own

Single or Multiple Users: Unlimited users

Format: PDF (other options: save to Google Drive, DropBox, send to Kindle)

Downloadable: yes

Printing Allowed: yes

Platform/Software: web browser; Adobe Reader

Accessibility Info: https://www.cambridge.org/core/accessibility

Registration: optional

Link to Support: https://www.cambridge.org/core/help/FAQs

How Cataloged: Individual records in catalog

Usage Reports: yes (see the E-Resource Usage Stats tab)

Notes

Cambridge e-books are available for purchase via YBP Gobi.

Some Cambridge e-books were purchased through the OhioLINK / Cambridge University Press DDA pilot in 2013/2014.

USER RESTRICTIONS



By: Justin Cutroni. O'Reilly Media, Inc. ISBN: 978-0-596-51496-9, 978-0-596-55797-3, 978-0-596-51496-9.

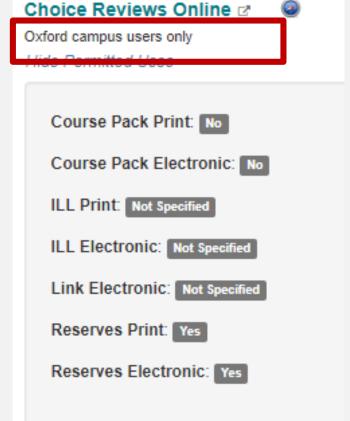
4. Google Analytics (O'Reilly Shortcuts)

100 simultaneous users across OhioLINK consortium

■2 Safari Tech Books Online 2007

■ Full Text Access

E-Book

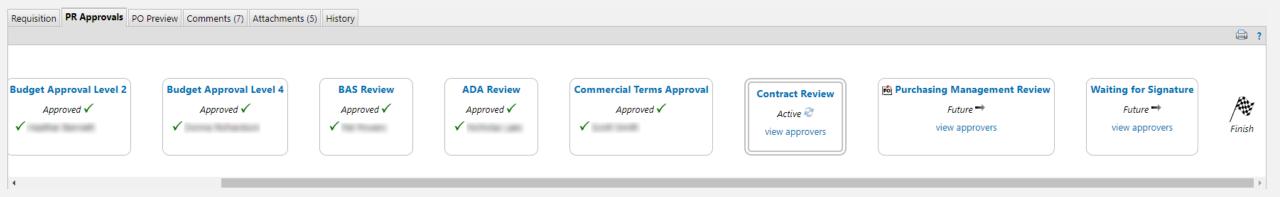


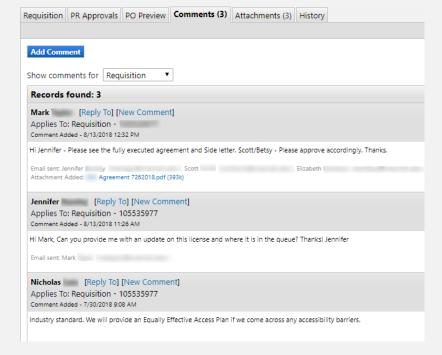
ECOSYSTEMS

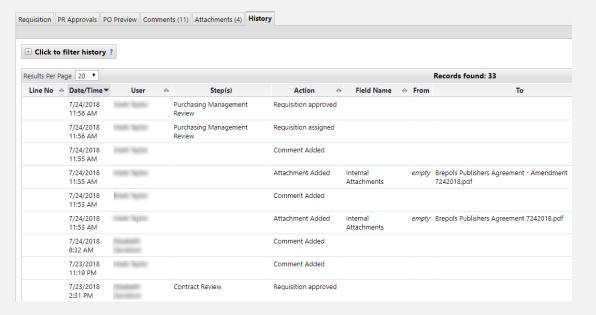
- Workflows
 - Licensing and procurement
 - Accessibility
 - IT (authentication, networking, etc.)

- Tools
 - Redundancies?
 - Interoperability?
 - Product integration?

PROCUREMENT





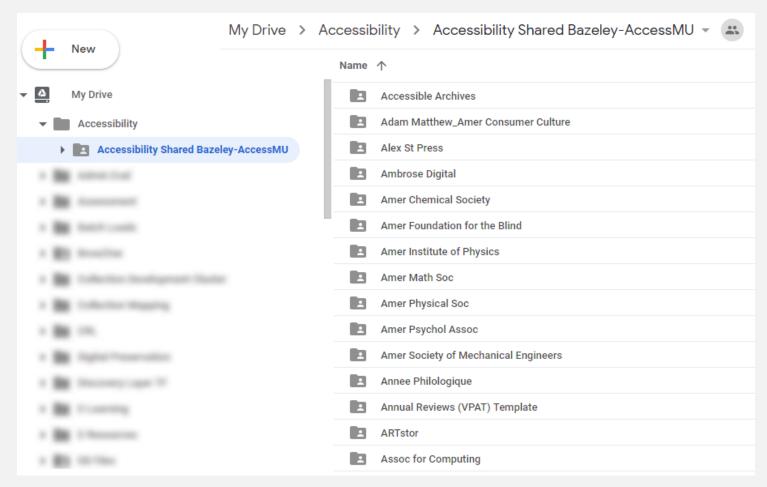


ERMS

Science	0036-8075	American Association for the Advancement of Science			Science Science (General) General	Journals
<u>Science</u>	0036-8075	American Association for the Advancement of Science	American Association for the Advancement of Science (AAAS)	American Association for the Advancement of Science	Science Science (General) General	Journals
Science	0036-8075	American Association for the Advancement of Science	Biography In Context	Gale Cengage	Science Science (General) General	Journals
Science	0036-8075	American Association for the Advancement of Science	E-Journals from EBSCO	EBSCO	Science Science (General) General	Journals
Science	0036-8075	American Association for the Advancement of Science	JSTOR Archive Collection	JSTOR	Science Science (General) General	Journals
<u>Science</u>	0036-8075	American Association for the Advancement of Science	JSTOR Free Early Journal Content	JSTOR	Science Science (General) General	Journals
Science	0036-8075	American Association for the Advancement of Science	JSTOR Life Sciences Archive Collection	JSTOR	Science Science (General) General	Journals

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Archiving Allowed	Yes Note: According to the LOCKSS & Portico websites, publisher participates in their archiving services. Check LOCKSS and PORTICO websites to confirm specific title holdings.
Archiving Format	
Perpetual Access	Yes Note: Institutions can request an archival file copy (provided on CD-ROM or alternative medium at UIP's discretion) containing all of the articles published online during the span of the institution's paid subscription.
Copy Digital	Permitted Explicit
Copy Print	Permitted Explicit
Course Pack Electronic	Not Specified in Agreement
Course Pack Print	Not Specified in Agreement
Distance Education	Not Specified in Agreement
Fair Use Clause	Yes
Applicable Copyright Law	
ILL Electronic	Permitted Explicit
ILL Print	Permitted Explicit
ILL Secure Electronic	Permitted Explicit
Link Electronic	Not Specified in Agreement
Scholarly Sharing	Permitted Explicit
Other Restrictions	
Walk-ins	Yes
Concurrent Users	
Reserves Electronic	Limited - See Notes Note: Requires written permission from the publisher:
Reserves Print	Limited - See Notes Note: Paging of a supplied on the publisher Paging of the publisher

ACCESSIBILITY



IT (EXCESSIVE USE)

"When certain usage thresholds are crossed, indicating the high probability of abuse of ACS content and/or a breach of our Terms and Conditions, access to the institution's site is suspended until the situation is addressed by representatives from the library. Many times these are the result of compromised credentials, or users being unaware of ACS's copyright/licensing policies ... ACS may prevent ... patrons ... from using ... Licensed Materials ... [in a way] that has a detrimental impact on the use of the services under this Agreement."

IT (EXCESSIVE USE)

Dear Administrator.

An IP address associated with your organization, MIAMI UNIV, has been temporarily blocked from accessing content on the website due to an excessive download violation. The unauthorized activity that resulted in this IP block occurred Monday, May 7, 2018 1:19:06 AM UTC. Access from this IP address will be automatically restored within a few hours.

We ask that you please research this issue to identify the root cause of the excessive downloads. Should you find abusive or unauthorized usage, please notify us immediately.

If you wish to have this IP permanently blocked while you explore the matter, please email us directly at the situation is satisfactorily resolved.

Please note that this cautionary measure may block access for some valid users from your institution if they use the same IP address, or the blocked IP is a proxy IP address.

Thank you for your patience and cooperation as we work through this issue.

"I just talked to my students and it turns out that a graduate student in my laboratory downloaded the papers on Friday. She is studying for an organic chemistry cumulative exam that will be held tonight. Our cumulative exams are part of the process our graduate students must complete in order to become a PhD candidate. These are intense, rigorous, 3-hour exams that focus in on a particular topic. Often the organic chemistry exams will deal with a specific subfield, often as represented by an issue of Organic Letters or other similar journals. This month's organic chemistry cumulative exam is on synthesis and students are asked to know syntheses from "The Journal of Natural Products, articles in the publish ASAP section (not yet in Journal) and from Organic Letters (Volume 18, issues either 17, 18, or 19."

IT (PROHIBITED USE)

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Thank you in advance for your immediate cooperation in ensuring that your institution and Authorized Users are in compliance with our agreement and the Artstor Terms. Please do not hesitate to contact me directly in this connection, and thanks again.

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Difficult Challenges: Those that we understand but for which solutions are elusive

Adapting Organizational Designs to the Future of Work

Increasing attention is being paid to the organizational structure of colleges and universities to better align them with the agile and 21st-century practices of the future workplace. Technology, shifting information demands, and the evolving roles of faculty are forcing institutions to rethink the traditional functional hierarchy. Institutions must adopt more flexible, team-based matrix-like structures to remain innovative and responsive to campus and patron needs. At Ithaka S+R, researchers are beginning a new study to examine the effect of academic organizational structure on decision-making. The findings from this project have implications for institutions' structures and policies. In order to adapt, higher education institutions are examining motivating factors for flexible designs but often face steep learning curves and resistance among staff.

Adams Becker, S., Brown, M., Dahlstrom, E., Davis, A., DePaul, K, & ... EDUCAUSE. (2018). The NMC Horizon Report: 2018 Higher Education Edition. https://library.educause.edu/resources/2018/8/2018-nmc-horizon-report

FURTHER READING

Emery, J. (2005). Is our best good enough? Educating end-users about licensing terms. Journal of Library Administration, 42(3-4), 27-40. doi: 10.1300/J111v42n03_02

Hulseberg, A. (2016). Technical communicator: A new model for the electronic resources librarian?. *Journal Of Electronic Resources Librarianship*, 28(2), 84-92. doi:10.1080/1941126X.2016.1164555

Stachokas, G. (2018). Reengineering the library: issues in electronic resources management. Chicago: ALA Editions, 2018.

QUESTIONS?

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