How to build a better mousetrap

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UNIVERSITY of **HOUSTON** | LIBRARIES

Agenda

- The Need
- Conceptualization
- Development
- Feedback and Modification
- Population Workflow
- Usefulness

Why did we need it?

- UH needed another solution because of confusion over how to use the ERM.

http://www.flickr.com/photos/life-long-learners/6855728019/

SerialsSolutions®
a ProQuest® business

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DLF
DIGITAL LIBRARY FEDERATION

| Concurrent User | concuser | 1. The licensed number of concurrent users for a resource
2. The number of concurrent users if shared across an interface rather than for a specific resource | |

Source: http://old.diglib.org/pubs/dlf102/dlf102.htm
Appendix D: Data Element Dictionary

❷ Simultaneous Users Unlimited

The number of concurrent users the license allows for one resource, or when shared across an interface.

ELECTRONIC RESOURCES
LICENSE REPOSITORY

Development: Basic Design

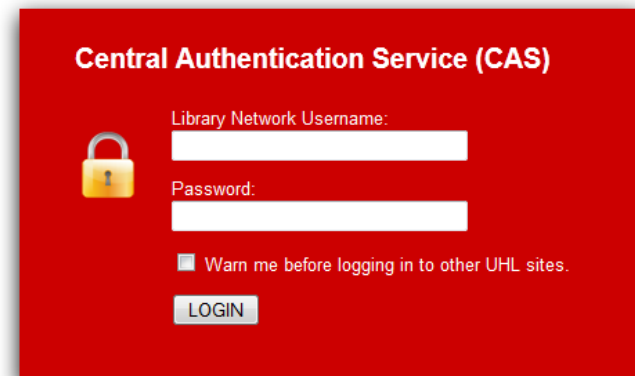Programming Languages:
- HTML
- CSS
- CakePHP framework

Data Source
- MySQL

Security
- CAS (Central Authentication Service)

Development: Two Interfaces

Administrator Capabilities:

- Search both active and inactive license records

- Create new or edit records

- Upload PDFS

- Edit the field "tips"

- Upload database statistics (.csv or .pdf) files

User Capabilities:

- Perform a simple keyword search that searches across a majority of metadata fields

- Perform an advance search

Development: Ongoing

Web Services:

- Maintains the Staff Directory System (SDS) which the ERLR pulls users department information from to determine administrative privileges

- Runs Google Analytics on the ERLR to monitor Usage.

Image retrieved from: http://www.cancerlearning.gov.au/share/index.php

Will this database work the way we want it to?

Can a professor put an article from *Gender Watch* on Blackboard?

Does the *TechStreet* Database have a Simultaneous User Limit?

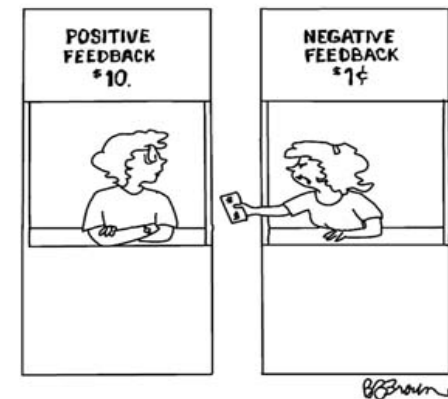Can we put our E-books from *Ebrary* on reserve?

feedback

"Working without feedback is similar to setting out an important journey minus a map or signposts. You may have a great sense of direction but this may not be sufficient to keep you on track."

        -Full Circle Feedback at
http://www.fullcirclefeedback.com/

POSITIVE FEEDBACK $10.

NEGATIVE FEEDBACK $1¢

"Here! Do me!"

The Number 1 Cause of Product Failure, According to Project Manager and Consultant, Tyner Blain: **Lack of User Input**

"In my experience, this manifests both as *not solving the right problems* and as delivering a product that is *not good enough*. The mechanisms are different flavors of 'not listening.'"
	-Tyner Blain http://tynerblain.com/blog/2012/02/08/why-do-products-fail/

Image retrieved from: http://www.bagofnothing.com/2009/06/top-10-failed-mcdonald%E2%80%99s-products/

This is what we heard...

"It's looking great. I can't see anything I would want to modify"
    -Nancy Linden, Science and Engineering Librarian

"What does the 'secure electronic' field mean? I can't figure out if the full question is 'Is secure electronic delivery required?' or 'Is secure electronic delivery allowed?'"
    -Nora Dethloff, Assistant Head of Access Services

"Perhaps info buttons that clarify what certain categories are. As in what does scholarly sharing include/mean?"
    -Sean Vaillancourt, Education Librarian

"We usually need to find out whether a journal is part of a package and whether or not we can add or cancel a title under a license agreement during our serials review. I couldn't figure out the information myself using this repository. "
    -Irene Ke, Psychology and Social Work Librarian

How did we make the fields
in the ERLR more Understandable?

How did we make the resources associated with each license more understandable?

Part of Consortium? ○ Amigos ○ GWLA ○ Other

Resources

Another Important Enhancement....

"Gasp!"

Avoiding doubt about the 'Silent Clause'

Is ILL Allowed? No — License Clause
In Print? No — n/a
Secure Electronic? No
Electronic Email? No

Is ILL Allowed? No — License Clause
In Print? No — Subscriber agrees not to modify, reproduce,
Secure Electronic? No — retransmit, distribute, disseminate, sell, publish,
Electronic Email? No — broadcast or circulate the Content received
through the Web Sites to anyone other than
Authorized Users.

Image Retrieved from: http://julesvaughan.wordpress.com/page/3/

Librarian Workflow-before licenses were scanned

For EVERY license agreement:

- Read the license

- Filled out a worksheet representing the fields in the ERM

- Filled out a worksheet representing the fields in the ERLR

- Contacted the vendors about any usage rights that were not specifically mentioned in the license agreement.

Student Worker Workflow

For EVERY license agreement:

- Scanned the License

- OCRed the License in Adobe Acrobat

- Followed a naming convention, and saved the PDFs in a shared drive

- Used the worksheets to copy and paste the relevant portions of the licenses into a word doc

Librarian Workflow-after licenses were scanned

For EVERY license agreement:

- Entered the terms into the ERLR and attached the PDF version of the license

- Entered the terms into the ERM and attached the corresponding resources

- Marked certain terms in the ERM for public display

Image retrieved from: http://www.freeimageslive.co.uk/free_stock_image/twohandtypingjpg

ERLR: Blank

Title * _____

Provider * _____

Type ☐ Databases ☐ Journals ☐ E-Books

Use Statistics Available ☐ Yes

COUNTER Compliant ☐ Yes

Authorized Users ☐ Faculty/Staff ☐ Students ☐ Individuals Affiliated With UH ☐

Walk-Ins

Simultaneous Users ○ Unlimited ○ Number _____

Part of Consortium? ○ Amigos ○ GWLA ○ Other _____

Scholarly Sharing ☐ Yes

Is ILL Allowed? ☐ Yes License Clause

In Print? ☐ Yes

Secure Electronic? ☐ Yes

Electronic E-Mail? ☐ Yes

Are Course Reserves Allowed? ☐ Yes License Clause

In Print? ☐ Yes

Electronic? ☐ Yes

(E-Reserves) ☐ Yes

Are Course Packs Allowed? ☐ Yes License Clause

In Print? ☐ Yes

Electronic? ☐ Yes

Can We Put Content On Blackboard? ☐ Yes License Clause

Perpetual Access
○ Only Materials Published During Subscription
○ One-Time Purchase
○ None

License Clause

Cancellation Policy ☐ Yes Policy Text

Other Restrictions

Pre-Print Allowed ☐ Yes Pre/Post-Print License Clause

Post-Print Allowed ☐ Yes

Resources

Notes

License Attachments _____ [Browse..]

Add | Cancel

ERLR: License entry

Use Statistics Available No
COUNTER Compliant No

Authorized Users Faculty/Staff, Students and Individuals Affiliated With UH
Simultaneous Users Unlimited

Part of Consortium? None Selected

Scholarly Sharing No

Is ILL Allowed? Yes
In Print? Yes
Secure Electronic? No
Electronic Email? No

License Clause
Institutional subscribers may fulfill interlibrary loan requests from other institutions via fax or paper document delivery under CONTU (National Commission on New Technological Uses of Copyright Works) guidelines [http://www.cni.org /docs/infopols /CONTU.html]. Redistribution of Journal content to non-authorized users in electronic or digital form is prohibited without prior publisher approval.

Are Course Reserves Yes
Allowed?
In Print? Yes
Electronic? Yes
(E-Reserves) Yes

License Clause
Institutional subscribers may use a reasonable portion of Journal content, in printed or digital format in the preparation of course packs or other educational materials for Authorized Users.

Are Course Packs Allowed? Yes
In Print? Yes
Electronic? Yes

License Clause
Institutional subscribers may use a reasonable portion of Journal content, in printed or digital format in the preparation of course packs or other educational materials for Authorized Users.

Can We Put Content On Yes
Blackboard?

License Clause
n/a

Perpetual Access

None

License Clause
The Institutional subscriber may perpetually use the LOCKSS system to archive and restore Journal content, so long as the Institutional subscriber's use Is otherwise consistent with these Guidelines.

Cancellation Policy No
Policy Text
n/a

Other Restrictions n/a

Pre-Print Allowed No
Post-Print Allowed No
Pre/Post-Print License Clause
n/a

Resources 9 Journal titles, see Serials Solutions

Notes n/a

ERM: Public Display

Authorized Users Faculty, Students, Staff, Walk-in Users
Display In ☑

Authorized Users Note Authorized Users are the Customer's currently enrolled full- or part-time students, employees, faculty, staff, affiliated researchers, distance learners, and visiting scholars. Authorized use includes remote access through an authentication (proxy) server that guarantees access only by Authorized Users. Walk-in patrons are also authorized to access to Product(s) while physically present at the Site.
Display In ☐

Concurrent Users Note unlimited
Display In ☑

Fair Use Clause Indicator Present
Display In ☑

Citation Requirement Detail Any use of articles or content must include proper citation
Display In ☑

Local Terms of Use:

License Term	Permissions	Note
Authorized Users	Faculty, Staff, Students, Walk-in Users	
Concurrent Users		unlimited
Fair Use Clause Indicator	Present	
Citation Requirement Detail		Any use of articles or content must include proper citation
ILL Electronic (email)	Silent	
ILL Print or Fax	Permitted	
ILL Secure Electronic	Silent	
Course Reserve	Permitted	
Other Use Restrictions (Public Note)		Authors' names and Publisher's copyright notices may not be removed or obsctructed

Is the ERLR useful to our intended audience?

We will conduct a survey on the usefulness of the ERLR

Pending:

- Serials Review

- One semester of ILL/course reserve requests

- One semester of instruction sessions

HOWEVER, we have received a lot of positive feedback in conversations with staff who have used the ERLR so far!
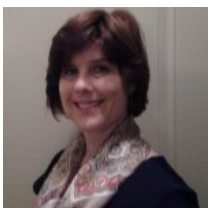
Thank you!

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