

Improving the Licensing Workflow at a Major Research University Library

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Improving the Licensing Workflow at a Major Research University Library

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ABSTRACT

A license agreement is negotiated when libraries enter into business relationships with content providers for access to electronic resources. The following discusses the changes implemented at The University of Alabama Libraries to improve workflow procedures and communication regarding the licensing process. Addressed within are aspects of license negotiations as well as suggestions to maximize the efficiency of tracking and managing licensing and the other business documents that reside as part of the process.

Keywords: licenses, agreements, contract negotiation, workflow, e-resources, acquisitions

INTRODUCTION

Upon arriving at University Libraries, the new Coordinator of Acquisitions and Electronic Resources was tasked with looking at the e-resource lifecycle workflow and implementing changes as needed to improve overall processes. After a thorough review of functions and examination of core e-resources tasks, it became clear that the licensing process workflow needed improvement in order to reach a desired future state of productivity. This is not to imply that prior workflow was not effective or efficient, but more so an acknowledgement that the process was quickly changing and needed enhancement. Additionally, the new e-resources Coordinator assumed the oversight of the licensing process with a modicum of licensing experience. The review of the licensing workflow presented three broad areas affecting procedures and decisions. First, the University introduced new requirements of additional business documents for each contract submitted. Second, opportunities to add clauses for new forms of scholarship, accessibility requirements, and other areas important to University

Libraries were prime for the taking. Third, the availability of new technologies along with staff adaptability and willingness to change aided in the efforts to improve workflow.

The robust collections of University Libraries provide research and curricular support for the 12 different colleges and schools on campus. The collections consist of over five million volumes and 580 listed indexes and databases containing e-content such as journal packages, e-books, streaming media, digital ephemera, and data-sets. The University of Alabama is a large public research institution with more than 2,000 faculty and over 38,000 enrolled students. The university recently received the Carnegie classification status of Doctoral Universities - Very High Research Activity which reflects a focus on increased research output. In turn, new areas of scholarship, such as text and data mining, are evolving and opportunities for new clauses within e-resources licenses are expanding. In addition, as noted by Rodriguez, faculty and researchers are stakeholders in the licensing process (2019, pp. 178-179) and therefore librarians have a crucial responsibility to maintain accurate records and a high level of efficiency in managing the licensing workflow.

Similar to other large academic research libraries, the e-resources staff at The University of Alabama oversees cost-containment and negotiation, licensing, access and discovery, and troubleshooting. The e-resources unit relies heavily on products and utilities within the suite of EBSCO's e-resource and acquisitions tools and has all of them implemented with the exception of an ERM (electronic resources management system). The work of electronic resources librarians and staff is typically fast-paced and hectic, complete with non-linear patterns and multi-faceted decisions dependent upon progression levels within the stages of workflow. The management of the workflow is even more important if an institution has procedures to complete tasks without the use of an ERM, because there are greater opportunities to lose files in multiple

storage systems that lack integration or connectivity as well as more opportunities for miscommunication as documents and tasks are passed back and forth.

The examination of the entire workflow through the lens of someone new to the University with limited licensing experience provided opportunities for a broader perspective of the licensing process.

The changes implemented at University Libraries in order to improve the licensing workflow are discussed. This includes the development of boilerplate text for clauses, the adherence to using structured file naming conventions, the movement of documents off a shared drive into a more versatile proprietary document management system, and the implementation of Asana in order to manage, communicate, and track the whole process.

This case study deals with the evolution of the licensing process at University Libraries and threads throughout suggested best practices while investigating the following questions:

- What negotiation priorities are part of Libraries' mission? (e.g., sustainable pricing, text and data mining, accessibility, author rights and depositing articles in repositories, etc.)
- What role does the e-resources personnel have in the negotiation process?
- What oversight does the campus provide?
- Who has signature authority?
- How can the licensing process be improved?

LITERATURE REVIEW

Over time, the acquisitions of library content has shifted from physical or print materials to electronic as evidenced in the increased expenditures and allocations for electronic resources in academic libraries. Because of this shift in medium the responsibility for licensing electronic

resources and the importance of contract management have gained in significance within the role of managing electronic resources. Zhu (2016) refers to the licensing process as “relatively new” when compared to other areas of librarianship (p. 69) and suggests that thorough understanding of the licensing process is becoming an emerging specialization.

For many years, when print resources represented the majority of library collections, librarians relied solely on U.S. copyright laws. However, U.S. copyright laws do not cover electronic resources which are largely governed by “contract law through the use of [a] license agreement” (Dygert & Langendorfer, 2014, p. 290). It is important for the academic community to understand that a license or any signed agreement takes precedence over copyright law (Coyle, 2005; Dygert & Barrett, 2016, p. 334).

Since electronic resources are technologically fluid and continue to evolve, libraries and content providers continually redefine their contractual expectations resulting in changes to how licenses are written (Zhu, 2016, p. 72). On its most basic level the anatomy of a license may seem similar among e-resource products, but in practice each license is handled circumstantially on a “case-by-case” basis because of the variability in the way each library and content provider handles differing situations (Zhu, 2016, p. 73). Many licenses are written with a “take it or leave it” style (Strauch & Chesler, 2009, p. 124) by someone from the content providers’ staff who might not know much about libraries or their changing needs. Because of this disconnect, it is possible that tensions may arise between those who draft the agreements and the librarians negotiating the contract. Therefore, librarians and negotiators must remove personal emotions that serve as barriers to the bargaining process in order to reach a mutually beneficial solution.

There are several different approaches in the literature to negotiating licenses. Lemley et al. (2011) summarize a “procedural framework” or checklist used to ensure librarians address

major issues within licenses. Whereas, Dygert and Barrett (2016) cite the difference between positional and principled bargaining (p. 338) methods as explained in Fisher and Ury's seminal work *Getting to Yes: Negotiating Agreement Without Giving In*. While Reagan and Halaychik (2018) break down the whole process into five different stages: Investigate, Commit, Review, Give-and-Take, and Finalize (p. 130).

Regardless of the decided upon approach, organization, preparation and education are key (Strauch & Chesler, 2009, p. 131). In 2013, the NASIG Executive Board adopted the NASIG *Core Competencies for Electronic Resources Librarians*, which includes sections on understanding licensing and the need for records management. According to Regan (2015), the most substantial competency outlined in the NASIG document is the licensing portion (p. 318), but unfortunately the NASIG document doesn't express how to acquire the ability to successfully complete negotiations or manage the documents just that the skills are core to the profession. Librarians, who are new to the responsibility for licensing or even those with some experience typically grow their skills and learn on-the-job (Regan, 2015, p. 323; Zhu, 2016, p. 73). Unfortunately, this is so because the curriculum in library school programs "lack focus" and these concepts aren't covered very well (Regan, 2015, p. 323).

Nonetheless, librarians need to build proficiencies in negotiating, and learn to work within the legal language of licenses that are essentially written to "favor the content provider" (Strauch & Chesler, 2009, p. 124). Ultimately, "it is the responsibility of the librarian to protect the library's rights" (Lemley, Britton, & Li, 2011, p. 327) and therefore "librarians must be cautious and vigilant when negotiating" (Lemley, Britton, & Li, 2011, p. 326) because the content provider "can impose whatever restrictions the library accepts" (Strauch & Chesler, 2009, p. 124).

The literature is full of resources to assist librarians as they navigate the licensing process. Many articles provide common language, checklists, and example clauses (Dygert & Langendorfer, 2014, p. 290; Lamoureux, Chamberlain, & Bethel, 2010; Lemley, Britton, & Li, 2011, pp. 333-337). The Liblicense listserv and website (Dygert & Langendorfer, 2014, p. 290; Zhu, 2016, p. 75) provide helpful resources for the librarian-negotiator to “interpret and create legally binding documents” (Hiatt, Jackson, & Hill, 2015, p. 181). The California Digital Library provides an online licensing toolkit and the interactive web program eDesiderata allows members of the Center for Research Libraries (CRL) to share information and opinions about e-resource licensing (Machovec, 2014, p. 73).

Noticeably missing from the library licensing literature, however, are the important aspects of document organization and workflow management. As noted by Carpan and Linoski “there is more to the licensing process than just the content review” (Carpan & Linoski, 2019, p. 130). In acknowledging that there were more procedures involved in the licensing process Carpan and Linoski went on to state their need to track the steps and stages where the licenses were located while in negotiation (Carpan & Linoski, 2019, p. 131). Further, they discussed their implementation of a tracking system.

Librarians should investigate various project management utilities and their respective benefits in order to implement their use to effectively manage workflow such as licensing because of the multiple moving parts and timelines. Even though licensing workflow doesn't fit neatly within the parameters of project management methodology, which defines a distinct beginning and end to projects, project management tools still provide viable solutions for workflow management. This is because project management solutions remove task- and

communication-confusion and provide easy to understand queues as licensing documents move across offices and departments from initial draft to final signature.

THE LICENSE WORKFLOW

When taking on the new responsibility of negotiating licenses for electronic resources it is important to delineate between the different workflow of negotiating business elements such as cost and service dates versus negotiating the license terms and conditions. There are a few options to approaching negotiations. For some libraries, it is possible that only one person negotiates the deal. Whereas other institutions might have a committee that reviews content for overlap, cost-per-use, and other metrics such as impact factor of journal titles, faculty members who publish in that title, faculty service on an editorial board, or use of content for curricular purposes. Some additional areas to consider while negotiating include the relationship history and prior spend with the vendor, any change in content (e.g., titles added or removed) in relation to the inflationary percentage upcharge, any discounts if a multi-year deal is agreed upon or if all years are paid up front, or any discounts if an additional product line is purchased.

At some institutions, this process of negotiating cost and licensing text might occur in tandem, while at University Libraries the procedures are mostly separate. Any costs or expenditures for University Libraries are negotiated and agreed upon with the vendor typically before any contract paperwork is drawn up and reviewed. A few staff members share responsibilities between both cost and contract negotiations and at times there are exceptions to the process of negotiating pricing first. For instance, consider consortium agreements and big deal journal packages where certain clauses may have such a high priority that cost or renewal negotiations are unable to proceed until certain clauses are settled.

At University Libraries the former process for licensing workflow began with the price negotiation and then vendor's would submit requests for documentation. E-resources personnel would receive documents by email and review them. Then, after making some key edits or "redlines," the license and business paperwork was forwarded by email to personnel who could load the license into the contract management portal for signature.

One of the more important points to begin with when learning the licensing process is to identify who the legal signatory is for your institution. For University Libraries, no one in the college has permission to sign legal contracts. This means, the Libraries loads all licenses, agreements, and additional business paperwork requiring a signature into a contract management portal for the Contract Management department to review and sign. The Contract Management department provides a comprehensive legal review for all licenses and the final layer of oversight.

Within the Libraries, the process as documents were received, edited, and passed to those with access to the contract management portal was tracked using email and excel. It is not an uncommon practice for electronic resources librarians to use email and excel as tools for managing different aspects of the e-resource lifecycle. Nevertheless, managing work through email can become cumbersome given the large amount of email exchanges e-resources personnel undertake and the inability to search effectively for sent or received emails. Equally, using excel has limitations since it is not a task management tool and is not necessarily conducive to staying organized no matter the proficiency of the user.

In order to improve the overall licensing process at University Libraries a few key changes were implemented. First, a license checklist with sample terminology for a few specific clauses was created. Second, all business related documents and contracts including those

finalized with signature and those in progress were moved from a shared drive into a cloud storage service called Box. Third, along with the move to cloud storage a detailed file management and naming convention schema was integrated into the internal procedures. Finally, the decision was made to move the workflow into Asana, a project management utility. Each of the implemented changes and their rationale are further explained in the following sections.

LICENSE LANGUAGE

To streamline the process of reviewing licenses a template of sample text for high priority clauses was created (Appendix A) along with a basic checklist to help guide the process (Appendix B). In creating the internal document to aid sample text the goal was to suitably adapt and modify each sample text with ease, specific to each contract, and then insert the text edits as needed within clauses during negotiations. While in-draft contracts are read in their entirety numerous times and redline edits are inserted along with suggested revisions as needed, attention to the specific clauses mentioned below has heightened as University Libraries worked to meet the identified changing needs of library users.

For example, the scope and output of scholarship in areas of text and data mining continues to expand. University Libraries fields repeated requests for text and data mining from campus stakeholders as research takes deeper dives into resources with researchers hoping to span full runs of e-serials content. Since this newer form of scholarship continues to branch into the use of multiple library databases and e-journal packages it is imperative the Libraries advocate appropriate language in the licenses for our campus partners.

In another aspect of scholarship, University Libraries is interested in rights related to depositing articles into the Institutional Repository. Even though publishers create separate agreements with university authors, the University Libraries has prioritized adding language that

allows the Libraries hosting and sharing privileges of preprints and published articles after an agreed upon embargo period.

As licenses are reviewed clauses are revised to include new forms of authentication beyond IP range such as Shibboleth or OpenAthens. Additionally, accessibility clauses requesting vendor compliance to Web Content Accessibility Guidelines, version 2.0 (WCAG 2.0) are inserted. On top of this, University Libraries has taken extensive efforts to collect current Voluntary Product Accessibility Templates (VPATs) documentation from each vendor with whom the Libraries does business.

Another area of concern, even though the service is not new to academic libraries, is interlibrary loan. As outdated as it seems some contract providers draft licenses insisting that interlibrary loan personnel still print off or fax copies. Hopefully, this practice on the vendor's part is just carryover from a former misunderstanding of the overall procedure and purpose of the service. Nonetheless, libraries need the ability to deliver documents electronically and older wording of interlibrary loan clauses should be updated to reflect how the service works in today's technology.

As with any negotiation there are instances where discussions can reach a stalemate. Two such example areas are jurisdiction or indemnification. For these clauses universities can choose to "remain silent" or depending on the clause add the phrase "to the extent allowable by [state] law." A third area which the Libraries tries to avoid are links to additional terms and conditions within the contract. The preference being that the contract stands as written without the opportunity for one side to make changes sans agreement from both parties.

FILE MANAGEMENT

This paper suggests implementing a schema for file management complete with naming conventions. It is important to decide where business paperwork and licensing files will be managed and stored. Some librarians may choose to store documents on a shared drive or within a proprietary document management system such as SharePoint or Box. Others may upload or link documents into an ERM or library service platform. Regardless of where documents are stored, adherence to generic principles related to information retrieval and management would benefit any organization.

While the idea of file labeling might seem like a rudimentary skill, the concept, while valuable, is often overlooked. In relation to licensing, sometimes the license file names are under the publisher and sometimes they are named by product (Carpan & Linoski, 2019, p. 133). Consistency in labeling files helps with organization and provides staff a “best guess” opportunity when searching for a needed or misplaced file. Those that manage licenses should consider setting in place a few procedures to manage internal files in the most effective and usable way to prevent any careless storage and labeling of documents. Poor file management can stem from staff conforming to previous practices or not knowing how to do better. It is important to have a purposeful destination when storing files so others can easily access the correct information without having to open multiple documents or folders.

One issue of concern for file naming is version control. Many works in progress are passed amongst multiple team members and file names are inconsistent and often appended with a person’s initials or other identifiable but non-standardized string of characters. Working in this capacity, without version control, causes multiple copies of similar files, each with enough content revisions and edits that maintaining the most accurate or latest version is difficult.

Often these multiple, similar files are stored together in the same folder. Inconsistent labeling causes confusion when returning to a folder later in time or integrating staff unfamiliar with the document evolution. In order to implement an effective naming convention, as shown in Figure 1, give consideration to the following elements and attributes:

- Descriptive names: Vendor, Content provider, Consortium
- Types of reports: License, Amendment, Order Form
- Date range: Service term dates, Calendar year
- Version: Fully executed (FE), Draft, Needs signature
- Date of creation: 20200101.

One thought when adding a creation date to a file name is to use the year-month-day format. This means using YYYY-MM-DD with YYYY representing the full four digit year and MM and DD having the full two digits for month and day including leading zeros. Naming files with dates in this format allows files to automatically sort when saved in the same folder and aides in locating the most recent version.

Good document management and version control through proper naming convention are the backbone to the Libraries internal resources. Staff should not have to rely on institutional knowledge or in some cases knowledge specific to one employee to understand or locate fully executed contracts.

CLOUD STORAGE AND WORKSPACE: UA BOX

University Libraries is in the process of moving all licensing documentation from a shared drive into the cloud content management system, Box, which has been branded university-wide as UA Box. This storage system allows users to set specific permission levels when sharing folders and

documents and therefore staff in multiple departments can access the documents whenever needed. The system simplifies the storage of licenses and business documentation and allows documents to be passed via email through a simple link generated either at the folder or document level. The ability to share in such a simplified manner puts a stop to the former process of emailing files back and forth.

In addition, UA Box is integrated with Office Online, a simultaneous editing environment, that allows for multiple users to edit documents at the same time and the system automatically saves the consecutive edited versions. These features for editing, also remove the need for email since the edited documents can remain in one place. Overall, because of the various functions within UA Box it is easier to store documents, rename folders, and move folders for file management purposes and therefore has improved efficiency.

For the licensing workflow, a folder was labeled “Licenses-in process” which also stored vendor product subfolders labeled with the vendor name and suffix “in process” as shown in Figure 2. Each subfolder as displayed in Figure 3 stores a state required Vendor Disclosure Form, a Business Form for IT, any current vendor documents needing signature, and any previous applicable licenses. For each negotiation all documents within a folder are sent for a secondary supervisory review and loaded into the contract management portal for signature where there is potential that contract management will send the documents for additional levels of legal review.

Upon the Libraries receipt of the final executed document it is stored in place of the document with redline edits, which is deleted, and the vendor subfolder is renamed by removing the suffix “in process” and then moved out of the “in process” folder.

WORKFLOW MANAGEMENT WITH ASANA

Asana is a versatile web-based project management tool that extends services beyond the Kanban-style of project boards and includes task lists, calendars, communication channels, and more. In 2019, University Libraries implemented Asana for all workflow related to the electronic resources lifecycle and multiple project boards and task lists were created. Figure 4 demonstrates a project board created to track licensing workflow.

A project board is organized by columns which serve as categories for similarly related work. Each column is populated with drag-and-drop cards referred to as “tasks” within the system. The tasks offer additional features to communicate effectively. This includes the ability to assign staff and set due dates for each task, create custom tags or labels, add comments, questions, or explanatory notes, follow specific tasks for updates, and attach documents. Tasks can be moved seamlessly between columns and placed as needed as work progresses through the various stages. In addition, task dependencies can be linked to other project boards. For example, a task to negotiate a license can be linked to the renewal and payment project board.

The decision to move licensing work into Asana occurred in order to improve internal communications within University Libraries. This was particularly important not only for tracking the completion of each step within the licensing procedure, but also for staff outside of the licensing process (e.g. those who approve or make payments) that needed a way to follow and confirm when the fully executed documents were complete.

It is common for licensing and business documents to move frequently back and forth between internal and external personnel before completion. The communication of where documents were in the process wasn’t always clearly distributed among staff because of the multi-faceted workload. Even so, the payments for resources hinge on the licensing process and can’t be disbursed without a signed contract. Therefore staff handling the approval and payment

of invoices needed a quick and effective way to check if products were in negotiations or if the contracts were finalized. The configuration of workflow into Asana fills this gap and provides staff an easy to access visualization to move their work forward. Moving work into Asana provided University Libraries a better collaborative workspace and better communication.

CONCLUSION

“Licensing work has become an increasingly specialized, indispensable area of work in the library profession” (Zhu, 2016, p. 76). There are multiple business and contractual documents shuffling between librarians, content-providers, library administration, contract management offices, and vendors’ signatories. Not only are the specific cost and contractual negotiations of importance, but also, the organization of all of the materials plays a critical role in the process.

The decisions to explore the licensing workflow and implement procedural changes has greatly benefited University Libraries. Those responsible for licensing now have a better understanding of the Libraries’ role in negotiations. Additionally, the move to UA Box and Asana provides all internal parties the ability to access all materials more easily. Therefore, if documents need review they are not held up in queue if someone is away.

Overall, as Carpan and Linoski summarized (2019), “there is a lot of work involved in managing electronic resource licensing workflows” (p. 133). University Libraries has set forth strategically implemented procedures and tools to accomplish better communication and optimum efficiencies in tracking task completion.

Appendix A: Sample text of selected clauses

Accessibility:

[Content-provider] will make reasonable efforts to ensure that Subscribed Products provided under this Agreement conform to the W3C Web Content Accessibility Guidelines, version 2.0(WCAG 2.0) at conformance levels A and AA. Exceptions are noted in [Content-provider]’s then current Voluntary Product Accessibility Template (“VPAT”) which details current features of the products that support accessibility. In the event the Subscribed Products do not fully conform to WCAG 2.0 A and AA, [Content-provider] agrees to promptly respond to any issues regarding accessibility capabilities of the Subscribed Products. If WCAG 2.0 A and AA are not supported by the Subscribed Products, the Subscriber may adapt the Subscribed Products in order to allow Authorized Users with disabilities to access the Subscribed Products to the extent necessary to comply with applicable law.

Interlibrary loan:

Except as set forth in Prohibited Uses herein, Subscriber may use the [Content-provider] Products to fulfill requests for Interlibrary Loans (“ILL”). ILLs are permitted to support non-commercial scholarly research by patrons of other libraries such as public, school, or college libraries. Subscriber may obtain a copy of an individual article, individual book chapters, proceedings, monographs, or other individual items from the [Content-provider] Products in PDF format (Portable Document Format) and transmit it to the ILL requesting Library by mail, fax, or electronic transmission. The Subscriber may make up to five (5) free article copies of individual journal articles, proceedings, individual book chapters, or other individual items from the [Content-provider] Products per year for ILL purposes. Additional requests may be fulfilled only if the applicable single copy fees are paid either to the Copyright

Clearance Center or directly to [Content-provider] through its sales procedures for single articles, individual book chapters, proceedings, or other individual items from the [Content-provider] Products.

Text and data mining:

Authorized Users who wish to text and data mine the Licensed Electronic Products for non-commercial purposes may do so by using the [Third Party] Text and Data Mining Service {URL} and consenting to [Content-provider]'s Text and Data Mining Agreement at {URL}.

Institutional repository:

The Subscriber may store in perpetuity in, the Subscriber's secure database system that the Subscriber uses to collect, preserve and disseminate information about the intellectual output of the Subscriber's institute(s) ("Institutional Repository"), preprints in accordance with [Content-provider]'s sharing and hosting policy {URL}. Accepted manuscripts can be hosted by the Subscriber (without using [Content-provider]'s API(s)) and made available to the public after the relevant journal embargo period.

APPENDIX B: University Libraries License Checklist

- Authorized Users
 - o Persons affiliated with University
 - o Students, faculty, researchers, staff,
 - o Walk-ins
- Access and Authentication
 - o IP Addresses
 - o Additional forms of authentication, remote access
- Authorized Uses
 - o Access, remote access, browse, view, collate, display, search, retrieve
 - o Print, download, copy, store
 - o Incorporate in course packs, reserves, course management systems, instructor websites
 - o Provide print or electronic copies to other authorized users
- Interlibrary Loan
- Institutional Repository
- Text and Data Mining
- Usage Data
 - o UA has the right to collect it's own internal usage data, e.g., COUNTER usage data
- Fees and Payment
 - o UA agrees Fees will be paid to content provider within 60 days of the date of the start of the subscription
- Terms
 - o The agreement may be renewed upon mutual agreement in writing

- o UA has the right to early termination with 30 days notice (due to insufficient budgetary allotment from government)
- o UA has the right to terminate a contract with at least 30 days notice if the content provider breaches the contract
- o UA has at least 30 days to mend any perceived breach of contract
- Warranties
 - o The content provider agrees to specific performance warranties and to pay the penalties in the case of a failure to meet these levels of agreed upon performance
- Indemnities
 - o UA does not agree to indemnify the content provider
 - o UA can add the phrase "to the extent allowable by Alabama law"
 - o UA can agree to remain silent
- Disclaimer
- Limitation of Liability
- Force Majeur
 - o UA agrees to remove liability of the content provider for natural catastrophic events
- Severability
- Entire Agreement
 - o The agreement supercedes all other agreements
- Modification
 - o The content provider gives 90 days notice of a change in the license if the terms are subject to change
 - o UA prefers to remove all URL links to terms
- Confidentiality
 - o UA does not agree to a non-disclosure agreement

- o The content provider does not violate the privacy and confidentiality of authorized users
- Jurisdiction
 - o UA requests the state of Alabama
 - o UA can agree to remain silent
- Notices
 - o UA requests a specified address or electronic mail

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Figure 1

File Naming Convention Examples



Figure 2

Vendor Product Subfolders in UA Box

All Files > ERM Licenses > ☆ In Process

Name ^



Digital Theatre Plus in process



EIU in process



PsychiatryOnline in process



RSC Journals in process



Wiley Journals NAAL in process

Figure 3

Example of UA Box Subfolder Layout

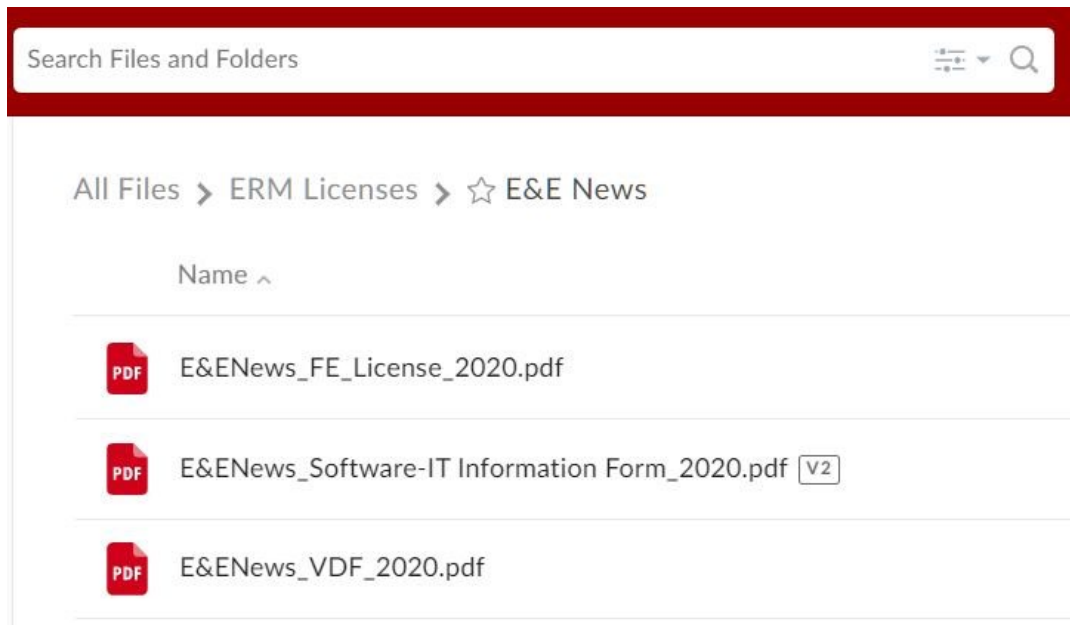


Figure 4

Asana License Project Board

The screenshot displays an Asana project board titled "ERM Licenses". The board is organized into five columns: "To Do", "In Progress", "With Mille", "With CM", and "Done". Each column has a plus sign icon for adding tasks. The "In Progress" column contains one task, "Wiley eJournals", which has a green "AD" status and a red "NO" status. The "With CM" column contains three tasks: "RSC Journal package", "PsychiatryOnline Premium APA", and "EIU Economist Intelligence Unit". Each of these tasks has a green "AD" status and three status buttons: "NO" (red), "YES" (green), and "YES" (green). The "Done" column contains three tasks: "RSC eBooks 2020", "Sage Journals", and "AIP". Each of these tasks has a green checkmark status and three status buttons: "YES" (green), "YES" (green), and "YES" (green). The top navigation bar includes a search bar, a "Share" button, and a "Set status" dropdown menu. The bottom of the board shows "2 tasks completed today".

Figure 5

Asana Task Card with Explanatory Notes and Tags

The screenshot shows an Asana task card for 'AIP'. At the top left, there is a green 'Completed' status badge. At the top right, there are icons for 'Send feedback', a pin, a list, a link, a thumbs up, a clock, a menu, and a close button. The task title 'AIP' is prominently displayed. Below the title, the assignee is 'Alice Daugherty' (AD). The due date is 'No due date'. The task is associated with the 'ERM Licenses' project, which is marked as 'Done'. There are three green 'YES' tags for the fields 'Filed in Box (Fina...', 'VDF returned', and 'IT Software form ...'. The description includes a request to route a document to Jenna Ramrattan (jramrattan@aip.org) for signature, with details about the Access Terms for Amendment (January 1, 2020 - December 31, 2022) and the signatory, Mr. Kevin Steiner (ksteiner@aip.org), Head of Global Sales and Advertising. The task is also marked as a 'Contact' and 'Signed License and Amendment in Box'. At the bottom, there is a '+ Add subtask' button and a comment box with the placeholder text 'Ask a question or post an update...' and icons for tagging and emojis.

✓ Completed

Send feedback

AIP

Assignee: AD Alice Daugherty

Due date: No due date

Projects: ERM Licenses Done

Filed in Box (Fina...): YES

VDF returned: YES

IT Software form ...: YES

Description: Return to the attention of Jenna Ramrattan
jramrattan@aip.org to route to signatory.

Access Terms for Amendment, January 1, 2020 - December 31, 2022.

Signatory
Mr. Kevin Steiner
Head of Global Sales and Advertising
ksteiner@aip.org

Contact

Signed License and Amendment in Box

+ Add subtask

AD Ask a question or post an update...