See Checklist A1 (Selection)
ELECTRONIC RESOURCE SUPPLY (E-JOURNAL) STAGE 1B – SELECTION

1.1 Subscription agents
   Publishers
   Media
   Academic Staff
   Students

1.2 Receive new resource info

1.3 Prioritize requests

1.4 Do we already have this E-journal?
   Y
   1.4.1 Do not purchase
   N
   1.4.2 Send to Collections to arrange purchase

1.5 Already have access to e-journal?
   N
   1.5.1 Part of a database or non-secure access?
       N
       1.4 Do not purchase
       Y
       1.5.2 Subscribe to print journal?

1.6 Do not purchase

1.7 Upgrade to E-journal or Print & E – see map 10

1.8 Note whether part of a package/deal inc other titles included; how cost is spread over titles
   Is access retained after cancellation?
   Preservation eg. LOCKSS/Portico
   Restrictions on cancellation?
   Counter compliant usage stats?
   Any issues with licence

1.9 Vendor provides pricing, licence info etc

1.10 Pass to internal budget group if necessary, to assess information on resource

1.11 Purchase E-journal?
   Y
   1.11.1 See Stage 2 Map
   N
   1.11.2 Record reasons, inform Academic Support if required and send feedback to vendor

1.12 Feedback to vendor

See Checklist A2 (Selection)
2.1 Assign vendor
   Eg. Subscription agent/publisher

2.2 Create record/raise order on relevant system eg. LMS, corporate finance system

2.3 Record details in relevant format (eg spreadsheet) including subs expiry date

2.4 Check licence and pass to relevant people for signing as appropriate

2.5 Store licence in relevant system

2.6 Get Purchase Order number from Finance/LMS where appropriate

2.7 Send order to vendor

2.8 Vendor receives order

2.9 See Stage 3 Map
3.1 Vendor sends access information
3.2 Add to internal systems eg link resolver/federated search
3.3 Inform internal staff
3.4 Update records (eg on LMS etc) and any web content eg. Passwords page as required
3.5 Promote to users eg. Subject blogs
3.6 Arrange training with supplier if necessary
3.7 Vendor sends invoice
3.8 Pay invoice on internal systems eg LMS, finance
3.9 Store invoice as required

See Stage 2 Map

EXTERNAL
ACQUISITIONS
COLLECTIONS
ACADEMIC SUPPORT

ELECTRONIC RESOURCE SUPPLY STAGE 3 ACCESS
**ELECTRONIC RESOURCE SUPPLY (DATABASE) STAGE 4A – CHANGE OF TITLE**

1. **Vendor sends Information on Change of Title**

2. **Cancel old record and create new record on LMS, finance system etc as appropriate**

3. **Check internal systems – has title been updated automatically?**
   - **N**
   - **Y (4.3.2)**

4. **Manually update information internal systems**

5. **Confirm update with Academic support**

6. **Guides, blogs etc updated with new information**
4.1 Vendor sends Information on Change of Title

4.2 Cancel old record and create new record on LMS, finance system etc as appropriate

4.3 Check internal systems – has title been updated automatically?
   - Y (4.3.2)
   - N

4.3.1 Manually update information internal systems

4.4 Confirm update with Academic support

4.5 Guides, blogs etc updated with new information

4.6 If sub includes a print element, refer to Change of Title instructions for print journals

See Checklist B2 (Change of Title)

ELECTRONIC RESOURCE SUPPLY (E-JOURNAL) STAGE 4B – CHANGE OF TITLE
5.1 Vendor sends information on change of Publisher

5.2 Update information on internal systems as required

5.3 Will this affect the price, licence cancellation policy etc?

5.3.1 No further action

5.3.2 Pass information to Academic Support

5.4 Note any changes for consideration during Renewal

EXTERNAL

ACQUISITIONS

COLLECTIONS

ACADEMIC SUPPORT

ELECTRONIC RESOURCE SUPPLY STAGE 5 - CHANGE OF PUBLISHER

N

Y

See Checklist C (Change of Pub)
**EXTERNAL**

6.1 Vendor sends details of Change of Platform

6.3.1 Chase with vendor; see if other institutions are experiencing any problems if necessary

**ACQUISITIONS**

6.2 Deactivate on old platform

6.3 Is resource available on new platform?

- **N**
  - 6.3.2 See Checklist D (Change of Platform)

- **Y** (6.3.2)
  - 6.4 Activate record on new platform
  - Inform internal staff as required

6.5 Guides, blogs etc updated with new information

**COLLECTIONS**

**ACADEMIC SUPPORT**

**ELECTRONIC RESOURCE SUPPLY STAGE 6 - CHANGE OF PLATFORM**
7.1 Vendor sends information on Publisher Name Change

7.2 Amend or create new record in LMS, Finance system etc as appropriate; check reason for name change

7.4 Will the price, licence cancellation policy etc be affected?

Y: 7.4.2 Inform Academic Support

N:

N: 7.4.1 No further action

7.3 Update information on internal systems as required

7.5 Note any changes for consideration during Renewal

ELECTRONIC RESOURCE SUPPLY STAGE 7 - PUBLISHER NAME CHANGE
8.1 Vendor informs us that a Print sub now includes E-access

8.2 Is E-access free of charge?

8.2.1 Inform Academic Support of price increase

8.3 Create new record eg. on LMS, finance system as appropriate Get information on licence, post-cancellation access etc

8.4 Set up access on internal systems eg link resolver etc

8.5 See stage 3 map

8.6 Guides, blogs etc updated with new information

8.2.2 Note increase for renewals

8.2.3 See Checklist F (addition of E)
9.1 Vendor informs us that a FWP sub no longer includes free E-access

9.2 Update record on LMS, finance system as appropriate

9.3 Amend information on internal systems (may need to remove title)

9.4 Guides, blogs etc updated with new information

9.5 Obtain quotes for Print & E and E-only subs, licence information, post-cancellation access etc

9.6 Vendor provides pricing, licence info

9.7 Will decide whether to renew as Print only, E-only or combined sub

9.8 See stage 5 map

See Checklist F (addition of E)

ELECTRONIC RESOURCE SUPPLY (E-JOURNAL) STAGE 9 – E-ACCESS NO LONGER FREE
ELECTRONIC RESOURCE SUPPLY
(E-JOURNAL) STAGE 10 – UPGRADE
PRINT SUB TO INCLUDE E-ACCESS
11.1 Vendor informs us that a title has ceased publication

11.2 Refund required?

Y

11.2.2 Vendor sends credit note

N (11.2.1)

11.2.3 Credit sent to finance; LMS, spreadsheets etc updated as required

11.3 Cancel record in LMS, finance system etc as appropriate

11.4 Update internal systems as appropriate

11.5 Guides, blogs etc updated with new information

See Checklist G1 (Ceased)
11.1 Vendor informs us that a title has ceased publication

11.2 Refund required?

11.2.1 Y

11.2.2 Vendor sends credit note

11.2.3 Credit sent to finance; LMS, spreadsheets etc updated as required

11.3 Cancel record in LMS, finance system etc as appropriate

11.4 Check we have access to issues paid for / Activate post-cancellation access

11.5 Guides, blogs etc updated with new information

11.6 If sub includes a print element, refer to cancellation instructions for print journals

See Checklist G2 (Ceased)
12.1 Obtain usage stats in advance of renewal date

12.2 Check whether licence agreement and product have stayed the same; check pricing information

12.4 Send renewal form inc. stats, licence & price info to Academic Support

12.6.1 Pass to internal budget group if required

12.7 Update information on internal systems if required

12.8 Check licence details; get licence signed etc

12.6.2 Record cancellation details on internal systems

12.10 Vendor sends renewal notice/Invoice

12.11 Pay invoice when received from vendor

12.12 Vendor informed/given feedback

12.13 Close record in LMS etc if required

12.3 Vendor provides pricing, licence info

See Checklist H1 (Renewal) and Checklist I1 (Cancellation)

12.5 Periodic review of subscriptions related to teaching, learning & research

12.6 Renew?
12.10 Vendor sends renewal notice/invoice

12.11 Pay invoice when received from vendor

12.12 Vendor informed/given feedback

12.13 Close record in LMS etc if required

12.14 If sub includes a print element, refer to cancellation instructions for print journals

12.15 Activate post-cancellation access

12.3 Vendor provides pricing, licence info

See Checklist H2 (Renewal) and Checklist I2 (Cancellation)

12.1 Obtain usage stats in advance of renewal date

12.2 Check whether licence agreement and product have stayed the same; check pricing information

12.4 Send renewal form inc. stats, licence & price info to Academic Support

12.6.1 Pass to internal budget group if required

12.6.2 Record cancellation details on internal systems

12.7 Update information on internal systems if required

12.8 Check licence details; get licence signed etc

12.9 Update record in LMS, finance system etc if required

12.12 Vendor informed/given feedback

12.5 Periodic review of subscriptions related to teaching, learning & research

N