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# Guidelines for the Introduction of Electronic Information Resources to Users

*Prepared by the Management Committee of the Machine-Assisted Reference Section (MARS), Reference and User Services Association (RUSA), American Library Association. Approved by the RUSA Board of Directors, June 1997. Revised by the MARS Management of Electronic Resources and Services Committee, January 2006. Revision approved by the RUSA Board of Directors, June 2006.*

**T**hese guidelines are intended to assist librarians who provide and publicize new electronic information resources to users and potential users. This document applies to Web-based, networked, and stand-alone resources that users may directly or indirectly access in an electronic format. The guidelines primarily apply to electronic information resources provided for end users and secondarily to mediated services. They apply to resources created by the library, commercially licensed, or freely available. Directed at information service staff who coordinate and manage the introduction of new electronic information resources, this document offers practical guidance to any library staff concerned with strategies for implementation, policy, procedure, education, and direct provision of electronic information resources. Though intended for all types of libraries, not every statement will apply to a particular library or type of library. Accordingly, this checklist contains suggestions and recommendations that may be adapted to local library environments. These guidelines apply to the implementation of new resources that have already been selected by the library for purchase; processes for selection and purchase of new resources are not addressed in this document, although some of the same points may apply.

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## GUIDELINES

1. Planning, Policy, and Procedure
  - 1.1 After selection of a new electronic resource, determine a schedule for making the resource available to users. Consider every aspect of these guidelines and include a time period during which the service is available in a testing and orientation mode for library staff who will be involved in the direct provision of service. It may also involve a preview period for users to alert them to the availability of the new resource and to provide feedback.
  - 1.2 Determine which staff will be involved and what their specific responsibilities and assignments will be in the implementation of the electronic resource. The implementation team should include representation from both systems and public services staff.
  - 1.3 Examine existing procedures and policies to determine whether they apply to the new service and, if necessary, develop new policies and procedures.

- 1.4 For electronic resources requiring license agreements or specific restrictions on use, determine which staff members have oversight responsibility for observance of any limitations on use.
  - 1.5 Conduct planning for staff education, user education, publicity, and evaluation and assessment of the service.
2. Testing, Compatibility and Remote Access
    - 2.1 Test for compatibility with different operating systems and browsers, both within the library and remotely. Set up communication procedures to inform users with incompatible systems.
    - 2.2 Test to determine if additional software is needed or any changes need to be made to existing hardware and software configurations of both staff and public computers. This should be done for in-library and remote users. If changes are needed, provide explanations and links for downloading plug-ins or other software.
    - 2.3 Explore and test remote access issues including: licensing, communications protocols, authentication, and remote access instructions and guides.
    - 2.4 Review and discuss customizable options. When customization is available, set appropriate default system settings and screens, especially related to searching (basic, advanced, and so on). Designate a system administrator responsible for settings and updates.
    - 2.5 Decide if and how to integrate the new resource into existing library search technologies, such as Open URL, journal title lists, and metasearch services. If bibliographic management programs are commonly used by library patrons, test the compatibility of the resource with these programs.
  3. Staff Education
    - 3.1 Establish a level of proficiency in the use of the resource or service, including access methods, basic and advanced searching, and an understanding of the content focus and any unique sources, and methods for using results (i.e. printing, downloading, or e-mailing). All library staff that interact with users, including part-time staff, should be informed.
    - 3.2 Designate one or more staff as specialists who will acquire an in-depth knowledge of specific resources for consultation and referrals for more complex user requests. Given the number, content, and complexity of electronic resources, not everyone can be expected to know all databases in-depth.
    - 3.3 Design staff training for a new resource or service to accommodate various learning styles and experience levels, such as hands-on practice, system tutorials, peer instruction, outside trainers, and study of appropriate manuals or other documentation.
  - 3.4 Even after initial training, staff education should be ongoing. Assign responsibility for distributing news about changes and updates to one or more members of the library staff.
4. User Education/Instruction
    - 4.1 Determine the appropriate type and level of instruction for a new electronic information resource.
    - 4.2 Determine the extent to which the service should be incorporated into existing user instruction and the extent to which new instructional sessions or methods would be helpful.
    - 4.3 Design user instruction to accommodate various learning styles and experience levels and include a combination of point-of-use instruction for individuals, group instruction, peer assistance (both user-user and instructor-instructor), tutorials, documentation, and signage.
  5. Publicity
    - 5.1 Assign responsibility for publicity to one or more members of the library staff. Publicity may be tailored to the specific communities of users most likely to use the resource.
    - 5.2 Inform staff of publicity efforts prior to implementation.
    - 5.3 Incorporate a variety of print and electronic media in the publicity.
    - 5.4 Include a specific description of the resource, relevant information regarding access, and contact information for further assistance.
    - 5.5 If possible, integrate publicity with the library's existing programs. Special attention may be given to library programs (classes, workshops, and so on) that promote use of the resource within the context of specific information needs.
  6. Assessment and Evaluation
    - 6.1 Assign responsibility for assessment and evaluation to one or more members of the library staff.
    - 6.2 If an initial preview period is used, solicit feedback and questions from library staff and from users. This feedback may suggest adjustments or changes before the official launch of the new resource.
    - 6.3 Conduct subsequent, regular evaluations to determine the effectiveness of the electronic resource in meeting

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information needs of the user community and to inform future decisions on selection or deselection of the resource. Evaluation should include:

6.3.1. Measures of system stability including response time, vendor responsiveness to system problems such as downtime and error reports, as well as other professional and industry standards for information resources.

6.3.2 Collection of qualitative and quantitative data, usage patterns, satisfaction surveys, and other appropriate evaluation methods.

6.4 Disseminate results or conclusions of the evaluation as appropriate.

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