ERM Implementation Checklist

Product:_____

Company:_____

1. Vendor Correspondence

Arrange for invoice or credit card payment   Date:_____   By:_____

Send IP ranges to vendor, if required   Date:_____   By:_____

Send email domains to vendor, if required   Date:_____   By:_____

Confirm payment/invoice with acquisitions   Date:_____   By:_____

2. Preliminary Testing

Is the trial URL identical to the URL for full-use?   Y   /   N

    If yes, does the trial URL still work?   Y   /   N

If no, does the new URL work?   Y   /   N

    Does the new URL provide the requested/paid content?   Y   /   N

3. Set-Up

Update proxy settings   Date:_____   By:_____

Reset proxy servers   Date:_____   By:_____

Update resource management software   Date:_____   By:_____

Add e-resource to OPAC   Date:_____   By:_____

Add e-resource to subject database   Date:_____   By:_____

Add URL to database list and/or subject guide   Date:_____   By:_____

    Guides:_____

Upload MARC records, if available   Date:_____   By:_____

Add license record   Date:_____   By:_____

Add to database stats spreadsheet   Date:_____   By:_____

4. Testing

Is the e-resource accessible on campus

    Through the catalog: Y   /   N

    Through database list   Y   /   N

    On a desktop/laptop   Y   /   N

    On a mobile device   Y   /   N

Is the e-resource accessible off campus

Through the catalog:	Y	/	N
Through database list	Y	/	N
On a desktop/laptop	Y	/	N
On a mobile device	Y	/	N

Are the statistics available?   Y   /   N

5. Marketing, Training, etc.

Provide info to marketing committee   Date:_____   By:_____

Schedule & provide training, if necessary   Date:_____   By:_____

Follow-up with users, 30-days after launch   Date:_____   By:_____

6. Notes

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

7. Further action taken, if necessary

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____