ERM Part I: Keeping the threads together: managing resources in the electronic world

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Unisa Library
E-resource life cycle

**New processes**

1. **Acquire/Select**
   - Trial use
   - Evaluate
   - Pay

2. **Implement/Provide Access**
   - Order
   - License terms

3. **Provide Support**
   - User feedback
   - Usage stats
   - Downtime analysis
   - Review problems
   - Problem log
   - Hardware needs
   - Software needs
   - Contact info
   - Troubleshoot/triage

4. **Administer**
   - User IDs
   - Admin module information
   - Preferences (store)
   - URL maintenance
   - Access restrictions
   - View rights for use
   - Claiming
   - Register
   - Proxy servers
   - Catalogue
   - A-to-Z lists
   - Link resolver
   - Holdings lists

5. **New processes**
   - New
   - Existing

**Contact Information**

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From far ..........

- Peaceful
- Serene
........... To reality

- Different forces
- Gravity
Managing your collection

• Big deal vs individual journal subscriptions
• E-books – title-by-title or bundles
• Overlap between resources
• Patron-driven acquisitions
• Ownership of content
Budget & funding issues

• Budget
  – How to budget
  – What new formats should we know about
  – How should we budget for it?
  – “Big deal” agreements

• New business models
  – Journals vs e-books
  – Leaving the print behind
Publishing industry

- Mergers, takeovers & acquisitions
- Ownership of imprints
- Sales representatives
- Dealing with a vendor – the do’s and don’t’s
- Value yourself as a client
- New Open Access options – Sage, APS, BioMed Central
- Trends in the publishing industry are YOUR trends
The legal part

• Procurement
  – Auditing principles described in King III report 2010
  – Good corporate governance
  – Risk based internal audit

• Unisa – Finance Policy & Procurement Policy
  – Due diligence: risk analysis, policy compliance, monitoring
  – Vendor database, BEE compliancy & financial health

• Licence
  – Copyright liability
  – Interest on late payments
  – Purchasing not-yet-published e-books
  – Post-cancellation access
  – Protection of privacy of user information
Staying alert

• Notifications about new resources
  – ResourceShelf
  – Choice
  – Against the grain
  – Blogs, listserves and publishers e-newsletters

• E-resources entering a new format development
  – Books & journals merging – diverging from print
  – New types of e-resources – image, statistics, e-books
The social life

- Blogging your news
- “Friend”ing your publisher
- “Following” the e-resources
- Publishers in direct contact with end-users
- Research workflow and social networking - impact
The everywhere library

- The mobile library
- Of readers, tablets and other devices
- Accessibility for the disabled
- Are you prepared for the attack from the mobile phone wielding Wikipedia-esque user / researcher?
Keeping track of content

- Journal transfers
- Publishers buy-outs
- E-book title lists
- Licence addendums
- Persistent identifiers – micro-level
In conclusion

Lost the thread?

Ariadne’s thread

www.ferryland.net
To be continued .....