

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

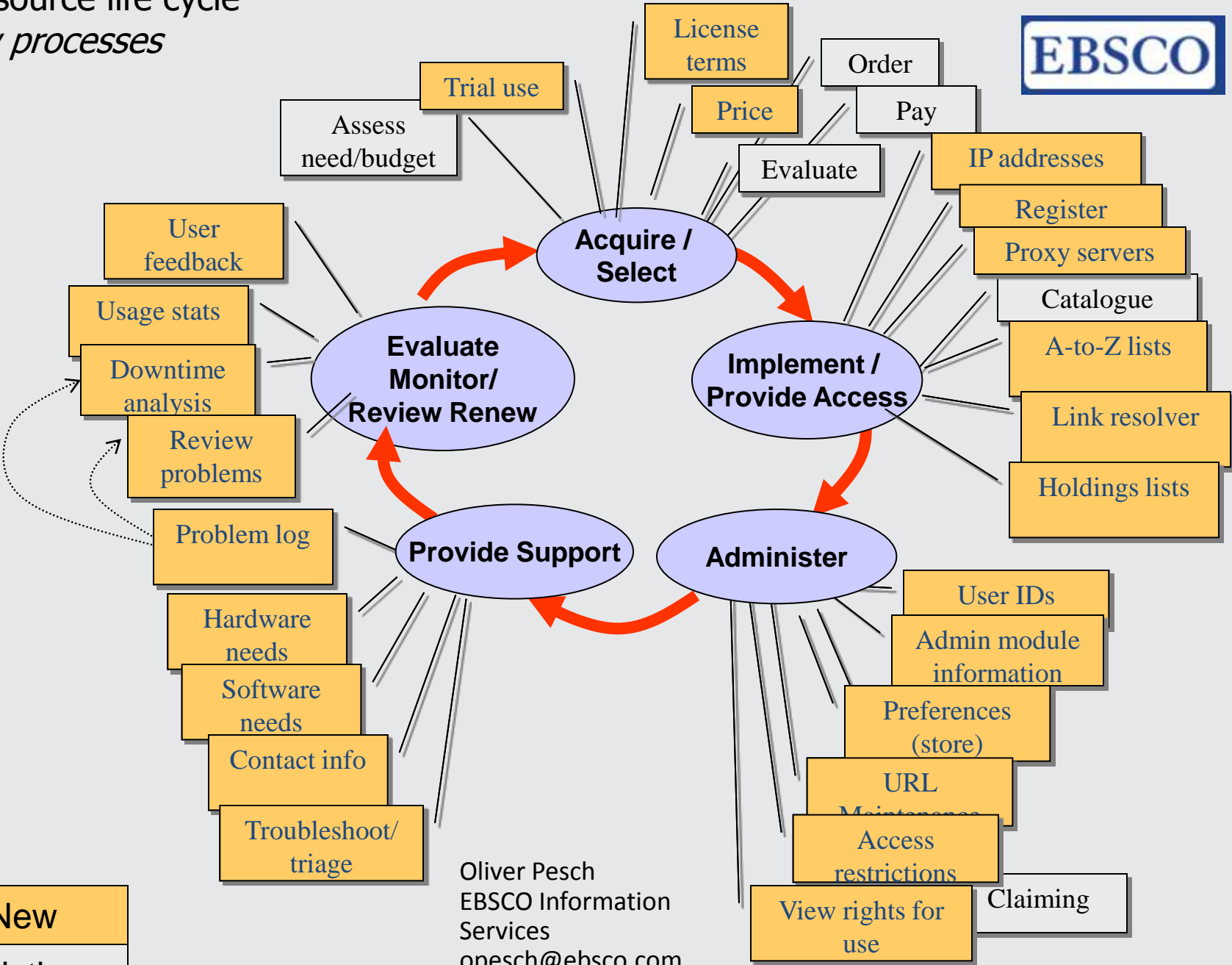
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Unisa Library

# E-resource life cycle

*New processes*



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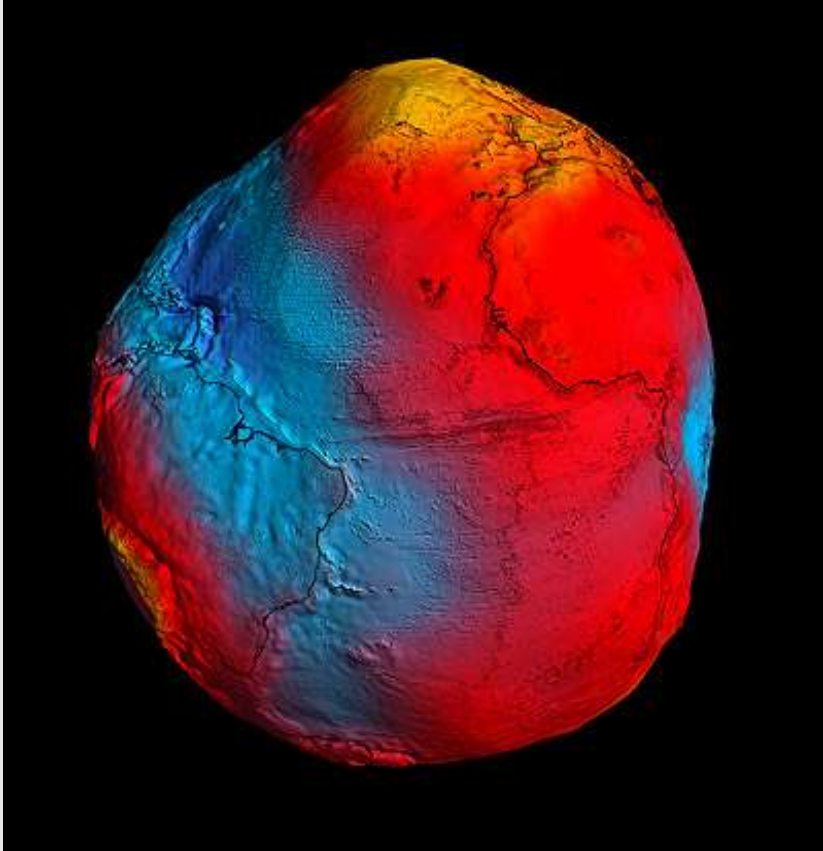
New
Existing

From far .....



- Peaceful
- Serene

.....To reality



- Different forces
- Gravity

Overlap analysis  
Program reviews  
Budget analysis  
ROI  
User evaluation  
Vendor evaluation  
Cancellation procedures  
Usage reports analyses

**Select & Acquire:**  
Need, Identify, Trial,  
Select, Procure,  
Licence, Consortium

Needs assessment  
Alerting  
Coll Dev policies  
Procurement & BEE  
Legal & financial policies  
Business issues  
Consortium offers

**Review/ Renew:**  
Problem review,  
Feedback, Usage stats

**Implement:**  
URL, Proxy, Remote  
access, A-Z list, Web  
page, MARC, Holdings,  
Announce

Technical require  
Marc records  
Procedures  
Contact persons  
Training

Marketing  
Training  
Migration plans  
Problem logging  
Integration  
other e-systems

**Support:**  
Troubleshooting,  
Hardware req,  
Accessibility

**Administer:**  
Admin info, Customize,  
Branding, Access,  
Licence restrictions

Licence violations  
Holdings changes  
Publisher changes  
Admin changes  
Authorized users  
Post-cancellation

**Workflow of an e-resource**

# 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

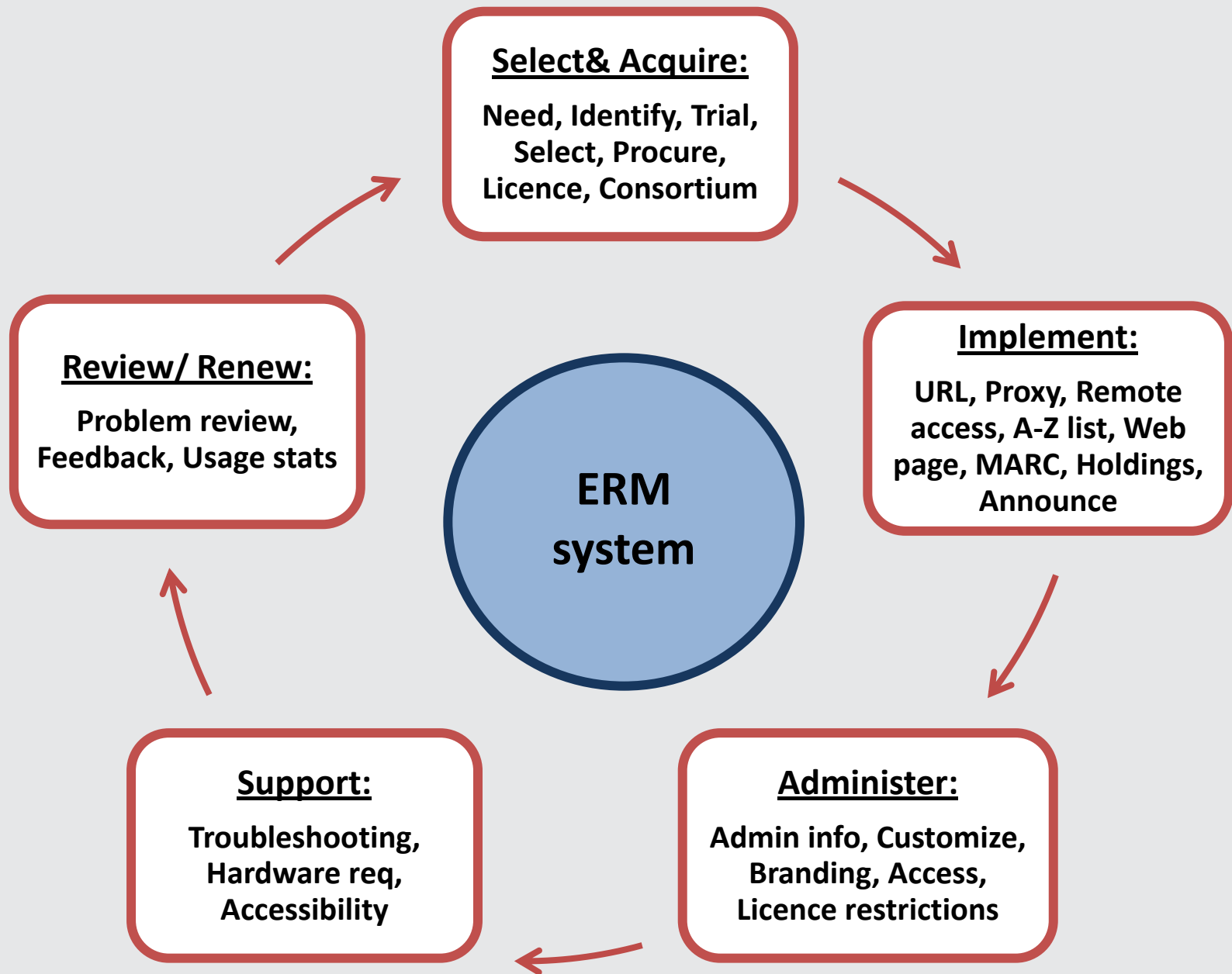
## Lost the thread?



[www.ferryland.net](http://www.ferryland.net)

## Ariadne' thread





To be continued .....



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