2019-08-23 Resource Management Meeting Notes

Date

23 Aug 2019

Attendees

- Dennis Bridges
- Abigail Wickes
- Martina Tumulla
- Sara Colglazier
- Virginia Martin
- Björn Muschall
- Ian Ibbotson
- Jack Mulvaney
- Felix Hemme
- Julie Brannon
- Martina Schildt
- ...

Discussion items

Item	Who	Notes	
Minute taker?	Abigail Wickes		
Renewals	Dennis Bridges	- Group continues with reneal discussion - Changes were already integrated according to feedback from last weeks' discussions - Communications with vendors in case of renewals: - Generally established that FOLIO just needs to reflect that order is renewed - other communications are not always necessary /need to be captured - Exceptions: changes to purchase orders need to be updated manually in jobber sites or via email **Abbreviation questions:** **EDI=Electronic Data Interchange aka EDIFACT standard** https://www.edibasics.com/edi-resources/document-standards/edifact/ from VM: "so we'll say something like "EDI invoicing" - which means using EDIFACT to load invoices … we use it so you don't have to manually key invoices" - Examples of whether monograph orders change over time and/or any communications that need to be manually conveyed to vendor and/or captured? - Subscriptions, standing orders, monograph orders **Subscriptions** are paid ahead, coverage/term-based defined by time, or volume/issue (stored at invoice level in Aleph) **Standing orders** are indefinite, ongoing, paid per volume - Question on renewal vs. coverage or term; - renewal isn't the same as coverage; Renewal is activity done with vendor - dates in current-ish calendar year; - coverage or term period is what you're renewing for - dates of publication of content in "front file" (when subscriptions are dropped access is then usually *only* available for years paid for, since older content from front file [usually from late nineties to present day] is only included as a perk and access to these non-subscribed years is not retained unless perpetual access is purchased) - What needs to be captured in order/invoice: **subscription term** - Terms are renewed every year - generally same period of time but not always (and years are turning over; month and day often stay the same but also not always, e.g. prorated terms, paying longer or shorter terms to realign renewal dates, or consortia will have subscriptions starting in July but individual institutions may not pick up until September so terms will be slightly different the following calendar year) - Reviewing subscription terms is part of renewal process - Would be useful to have info on date when **order** began rather than invoice, and ultimately close date; historical info is more useful at **order level**; invoice should have subscription term data as that is not static, subject to change - No renewals in standing orders because there's no subscription to renew (may re-encumber or not, depending on institutional practices; re-encumbering happens at FY rollover, renewals happen whenever the calendar date for renewal comes around) - Standing orders always need review periodically; - Internal factors: faculty retire so resource might not be as desired, other resource might be better value… - External factors: things go out of print and communication about ceasing publication may not go to the right place, so orders may stay open for a while with no activity) - Subscription review… Jobbers dictate renewal time periods and processes - Many subscription processes vary by publisher/content provider—jobbers bring some consistency but also restrictions due to that consistency/convenience - Non-renewal is not the same as cancellation in terms of process - Some things renew by themselves… e.g. if you took no action during cancellation window, you are automatically renewed (this is agreed to) - Can boil down to automatic or not, (but only automatic within subscription terms) **What visual overlap can be captured for print vs. electronic?** **Still need to discuss a lot re: receipts, receiving…**	