



# CAUL Office – CEIRC Operations

Datasets Coordinators Forum 2007

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**C·A·U·L**

COUNCIL OF

AUSTRALIAN UNIVERSITY LIBRARIANS

# Outline

- Introduction
- Offers to CEIRC
  - Receiving offers
  - Making offers available
  - Responding to offers
  - Collating responses
  - Finalising offers
  - Handling invoices
  - Handling licences
- Members' records
  - Datasets Coordinators
  - Invoice Managers
- Questions?

# Introduction

- Questions?
- moi
- CAUL Office responsibilities
- CAUL Office staffing
- CAUL web site <http://www.caul.edu.au/>
  - Finding your way around the web site
  - Information for Datasets Coordinators
- Communication
  - Single point of contact for institution/invoice/vendor
  - Back-up to spoc
    - Leave
    - Leaving
  - Internal – CAUL Administration
  - Other institutional/vendor communication
  - cc & subject lines
- Compare with JISC Collections or Canadian Research Knowledge Network (plus SCOUNL, CURL, CARL, etc)

# Offers to CEIRC

## - Receiving offers

- Referred by you or via web site, or through DA, Swets or iGroup
  - some contacted at your request
- Some have no experience selling to libraries, let alone consortia
- Some have no licences, or only corporate or individual licences
- Some have no pricing model for universities
- Refer to check-list for negotiation, and sometimes model clauses
- Ask for content information, trial, licence and transparent pricing
- Provide advice on anything that **will not** work for universities – not all advice is accepted!!!!
- Price is a moving feast – I can only compare with figures I know about e.g. another vendor with the same product or the prices you are paying now.

# Offers to CEIRC

## - Making offers available

- Create or edit vendor page
- Upload documents – some passworded
- Edit offers page
- Send email to list to alert all to offer
- Set date in task list for follow up

# Offers to CEIRC

## - Responding to offers

- If you already subscribe via CAUL, you **must** respond one way or the other
- If the content is relevant to your institution:
  - If the content is relevant, but the price or conditions won't work for you, please respond accordingly so I have more information to work with.
  - if the timing is not right, but you have some interest, please respond so I know there is potential interest
  - if the price is worse than you are paying now, please respond so I have more information to work with
  - Note the date for response, and follow up internally if necessary beforehand
  - Note the questions asked and respond to all of them
- If the content is not relevant to your institution, no need to respond

# Offers to CEIRC

## - Collating responses

### Collecting responses:

- Forward to CAUL Administration (currently Alisha Davies) for entering into spreadsheet
- Follow up with DSC if not all questions answered
- File in CAUL archive (by vendor/product, not by institution)

### Follow up

- Check that all current subscribers have responded
- Check that all who have expressed interest and/or who have trialled have given a final answer

### Repeat xxxxx times

# Offers to CEIRC

## - Finalising offers

- Notify vendor of:
  - renewing subscribers
  - cancelling subscribers
  - new subscribers
  - contact details, including IP addresses (from web site)
  - subscription details – vary with each “product”
    - paying through agent, CAUL or direct with vendor
    - e-only or not
    - titles subscribed e.g. Europa Routledge databases
    - simultaneous user numbers
  - request invoice if handled by CAUL
  - follow up

# Offers to CEIRC

## - Handling invoices

- Contract with vendor to pay within 60 days of receiving a correct invoice
- Verify that the invoice details match the final list of subscribers, and where possible, the final amount
  - journal packages the most difficult until the final reconciliation is done, and if subscriptions are paid partly or entirely through third parties
- Create purchase and sales (invoices)
  - one bill-to address per institution
  - ad hoc “estimated” invoices for those who need to pay before
- Email invoices, and print copy for files
  - weekly during November/December
  - immediately at other times
- Process income/payment advices
  - from CBoA for foreign currency
    - payment advice from institutions filed for later reference if necessary – most not needed
  - from institution for AUD, unless payment method doesn't cause the above to generate (several institutions)
  - follow up if payment covers multiple invoices but details not included
- Process payment to vendors (if funds are received in time)
- Send statements regularly December/January and occasionally otherwise

# Offers to CEIRC

## - Handling licences

- Accepting/changing vendors' licence
- Using CEIRC model clauses
- Signatory – CAUL, institution, both, neither
- Record keeping – web site, CAUL files

# Members' records

## ■ Datasets Coordinators

- Single point of contact
- Backup spoc / temporary change
- Multiple list members
- Technical contact
- IP range, proxy
- FTE numbers – total, discipline-based

## ■ Invoice Managers

- single bill-to person/position
- questions directed only to Datasets Coordinator
  - responsible for ensuring finance people understand
    - payment in native currency (payments received in another currency are repaid, not transferred between accounts)
    - effect of using a third financial institution between yours and ours (we pay AUD 35.00 to pay and eft, and AUD 5.00 to receive one; receiving payment by bank draft incurs transit **interest**, not a fixed fee)



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