

UC Electronic Resources Management Planning Meeting
Campus/CDL Survey
Electronic Resources Management at UC Irvine Libraries

Please complete the following questions as thoroughly as possible. We especially encourage you to solicit opinions from staff who will be unable to attend the Planning Meeting on March 11-12. We assume that the survey response will represent the consensus view from your campus, so if there are differences of opinion within your campus, please note accordingly.

Submit the survey via return e-mail (stefw@ucr.edu) or fax (909/787-3720) to Stefanie Wittenbach, Chair, Program Planning Committee **no later than Wednesday, March 3rd**. Survey data will be compiled and distributed for discussion at the Planning Meeting on March 11th. Thank you!

1. Who is involved in an official capacity with electronic resources? Please list job titles and reporting structure for the position (e.g., electronic resources librarian in the Cataloging Department).
 - Head, Electronic Resources and Federal Documents Cataloging Section - Cataloging Dept.
 - Electronic Resources Acquisitions Librarian - Acquisitions Department (with a secondary reporting line to the Collection Development Dept.)
 - Web Team members who update the electronic resources pages:
 - Coordinator, Design Services
 - Programmer Analyst, Web Services
 - Health Sciences Librarian [Leader, Web Technology & Innovation Team]

2. What tools, software or systems are you currently using to manage electronic resources decision-making, acquisitions, licensing, cataloging, maintenance, and access issues? (e.g., keeping track of license details, print subs. associated with the package, statistics, providing patrons with an e-journals directory, etc.)
 - Innovative Interfaces Inc. Millennium for cataloging and for URL checking
 - D-Base program for processing Shared Cataloging Records before loading into our catalog
 - A campus proxy server
 - Locally developed SQL database to enable simpler access to electronic resources as a group – content dynamically created from the III ILS
 - Ex Libris (SFX) for the UC eLinks project (access)

3. What aspects of any tools, software, or systems that you currently use to manage electronic resources work well or sufficiently? What if anything would you recommend to others?
 - All the above work sufficiently

4. What isn't working? What parts of electronic resources management are not well covered by your current system? Where are your greatest points of pain?
- Keeping track of packages as they add and delete titles, new licenses each year (often with changes, tracking coverage)
 - Setting up individual records for locally licensed titles contained in a package can be time consuming
 - Not currently maintaining holdings for local titles in our local catalog
 - Not currently cataloging or managing in any other way titles and holdings in locally purchased aggregator databases
 - Updates to URLs
 - Authentication for traveling faculty
 - Improving subject access to e-resources, as well as automatic generation of a-z lists.
5. What are your campus' greatest needs in terms of electronic resources management and related systems?
- Consolidated management reports (expenditures, numbers of titles, etc.)
 - Centralized/automated tracking of lending restrictions and other license issues (simultaneous users, passwords, ILL restrictions)
 - Ability to link individual titles to pay records for packages
 - Ability to easily determine tier 1, 2, 3 & 4 titles
6. What are your immediate, mid-and long range top priorities for electronic resources management and related systems?

Immediate:

- Generate management reports that facilitate forecasting expenditures to assist in decisions on canceling and adding new titles or canceling print for electronic access.
- Finding a replacement for the proxy server that scales to the size of the problem in maintaining current info on URLs and providing reliable connectivity.
- Improving subject access

Mid-range:

- Finding an affordable content management system that is compatible with our back-end database and flexible enough for design changes in public pages.
- Gathering and presenting statistics on use that are easy to understand

Long:

- Authentication system like Shibboleth promises to be.
7. What are your campus' current plans for addressing your campus' top priorities and needs?
 8. Are you considering purchasing systems or products for electronic resources management?
 9. What are your campus' greatest needs with regard to shared/system-wide electronic resources management?
 - To avoid duplication of effort on the campuses
 - Identifying a data management and decision-making system/tool to coordinate system-wide shared collection analysis and decisions
 10. In your opinion, what are the greatest barriers to implementing a UC-wide ERM system?
 - Meeting the needs of each of the campuses
 - Duplicating effort - needing to keep information in 2 systems
 11. Anything else you'd like to share?
 - While the Shared Cataloging Program has been extremely helpful, it would be great if there was a way to manage the cataloging of shared/system-wide e-resources so that only one record was maintained, but that we could all use, instead of each of us having to locally process those records into our local online catalogs.