

**UC Electronic Resources Management Planning Meeting
Campus/CDL Survey
Electronic Resources Management at UCSC**

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).

**Collection Planning Coordinator in Collections Planning Dept.
Reference Librarian in Science and Engineering Library
Reference Librarian in McHenry Library
Electronic Resources/Serials Librarian in Technical Services**

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.)

**Request Tracker to manage emails, publisher/user/staff contacts regarding ER
Collection Planning databases (FileMaker Pro, etc.....)
Online Journal database (Zope)**

Publisher, serial vendor & electronic serial aggregator systems & reports. Not only do we currently use these but any system we get must be able to interact with these often in batch mode and integrate the information provided for updates and currency

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?

None that is available and easily accessible to everyone within our library. However, the export features in Innopac and custom reports from vendors are very useful in the context of a relational database and worth looking at when considering how well a new system might integrate them

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?

We do not have one single system that is accessible to all in our library who are involved with electronic resources. There is no one stop shopping and no up-to-date reliable data about the status of each electronic resource and cost projections.

Volatility of the publishing industry, the short-term nature of contracts, the huge volume of resources, constant massive changes and out of control inflation all impact our ability to maintain accurate records, but at the same time, we need updated information for quick analysis & decisions.

5. What are your campus' greatest needs in terms of electronic resources management and related systems?

One stop shopping for everyone to access up-to-date information.

Integration of information available from a wide variety of resources (variety in content as well as format).

Need a relational database that can serve Collection Planning, Cataloging, Acquisitions, ILL and public services in depth as well as quickly updating data from downloads. No duplicate data entry

6. What are your immediate, mid-and long range top priorities for electronic resources management and related systems?

Difficult for mid and long term range planning. Given how quickly the changes, we need whatever works best for now and should not worry so much about what might replace it

7. What are your campus' current plans for addressing your campus' top priorities and needs?

Looking for an off the shelf system that is proven. Do not want to program one from scratch.

8. Are you considering purchasing systems or products for electronic resources management?

Yes. We would also like to know whether we can use the UC system instead

9. What are your campus' greatest needs with regard to shared/system-wide electronic resources management?

Ability to access local data as well as system-wide data without duplicate entry and efforts. Ability not to duplicate data/efforts even at the local level among different units.

Maintaining links as well as managing claims with vendors, publishers and aggregators, we cannot nor do we want to limit our user access points

10. In your opinion, what are the greatest barriers to implementing a UC-wide ERM system?

No one good solution exists, therefore campuses have used a mix of resources, not necessarily compatible, nor have all campuses developed the same depth of local information control.

Too complicated to meet every campus' needs. Difficult to come up with an agreed set of broad subject terms to be used by every campus. There doesn't seem to be any currently available system that does what we want, and we are understandably reluctant to do a lot of original programming to get one

11. Anything else you'd like to share?

Interim, low cost, low investment system to bring together data from individual campus systems

Hope that the campus does not need to spend a lot of money on an ERMS. I do not think any campus has any surplus staffing or financial resources. This ERMS has to save our efforts, reduce work duplication, and not add to our current workload.

We have a feeling that this unpolished summary of our collective thoughts reflects the reality not only at UCSC, but across many campuses.