

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

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).

Alan Daniel, Serials/Electronic Resources Specialist in Resources Management
Paul Wakeford, Coordinator of Resources Management
Julia Kochi, Director of Digital Library & Collections
Anneliese Taylor, Collection Development Librarian

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.)

Excel, INNOPAC, CDL Directory and site, UC-eLinks, Publisher/Aggregator/Vendor websites

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?

UC-eLinks

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?

Lack the ability to quickly and easily identify journals in CDL packages
Communication between technical and public services, between publishers and library is difficult due to the complexity and changing nature of holdings and makes patron verification difficult

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

Compatibility with ILS (INNOPAC)

url checker

Licensing access and tracking

Reports by title/package

Dealing with multiple urls

Ability to add notes, alerts

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

Immediate:

Something better than current manual tools and something that works for staff especially as long as CDL Directory remains operative.

Mid/Long term:

An integrated system for all UC electronic resources and libraries

A system that better serves patrons

One that manages Licenses well

One that offers a cost savings for all

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

Investigating low cost commercial products

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

Yes.

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

Integration with ILS

Real time information about purchases/cancellations

List of titles in packages for which we contribute and those for which we do not contribute, but have access

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

Integration with campus systems
Resources for the management of the system
Adherence to standards

11. Anything else you'd like to share?

No.