

Group 3, Breakout Session 1, 3/12/04

Commonalities:

- 2.2.1—Batch import from complementary systems
- 2.2.2—Batch export from complementary systems
- 2.2.3—Facilitate renewals
- 2.2.4—Facilitate acquisition of new resources
- 2.2.5—Facilitate termination

- 2.3—Support licensing
- 2.4—Support cataloging
- 2.8—Contact information

Priorities:

- 1) Batch update process, batching import/export, (single record & batch). Ability to global change.
Acquisitions: e- & print pricing, publisher/ package/ vendor information [authority control] in and out of package, customizable in all ways (pricing, local data, etc. Extreme flexibility.
- 2) Acquisitions & Renewal tracking at the resource & title level (package content, pricing), cancellation restrictions. Ability to track print subscriptions and history of our print subscriptions,. Ability to quickly & efficiently do subscription checks & export data.
- 3) Licensing: store license information (ILL, e-reserves, proxy, perpetual access) & contact info in fields for quick lookup with ability to do fuller lookup.
- 4) Need for cataloging interoperability. Promote sustainability of cataloging workflows. Ability to customize cataloging information/ access points.
- 5) Availability to produce customizable report from all data stored in system.
- 6) Tickler feature for all kinds of notifications.
- 7) Ability to store contact information at resource level, both sales and technical information, with appropriate security. Ability to generate email help request (to CDL and/or local contact).
- 8) At renewal time, ability to bring package renewal price and cancellation into local ILS. [So that we can reconcile invoices. In lieu of recharge procedures.]
- 9) Ability to generate “resource advisory” at system and local level—including via UC E-Links.

Later on: Metadata for licensing information.

Other points: Sustainability—of current workflows, SCP workload. Our workloads may need to change.

Policies and “social agreements” so systems/tools are shared and used. Clarity of standards and definitions. (editing rights, permissions, authorizations within the systems.)

If attributes are properly aligned, then it will support numerous functions (licencing and cataloging.) i.e. customization.

Do we need MARC data in this system? Needs further discussion.

Could we change our procedures such that we don't need "package renewal price" reconciliation?