UC Electronic Resources Management Planning Meeting
Campus/CDL Survey
Electronic Resources Management at ___UCLA_____
Mar. 4, 2004

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).

Historically, the UCLA Library has taken a highly decentralized approach to many aspects of library services and operations including the functions related to the relatively new and emerging reliance on digital resources. Currently, at UCLA we have established several key positions and many portions of positions dedicated to aspects of digital resources. Among the staff with significant job responsibilities related to digital resource management are:
   o Sharon Farb (Coordinator for Digital Acquisitions), reports to AUL for Collection Management and Scholarly Communication (AUL/CMSC)
   o Mike Randall (Electronic Serials Librarian, CDL Acquisitions Liaison, and backup UC eLinks Liaison), reports to AUL/CMSC
   o David Yamamoto (Web Architect), reports to AUL for Research and Instructional Services (AUL/RIS)
   o Mollie Bowling (UC eLinks Liaison), reports to Head of Social Sciences & Humanities Acquisitions
   o 11 E-Resource Liaisons and about 24 Subject Liaisons in support of our Electronic Resources Database (ERDb) who report to various unit heads
   o Andy Kohler (ERDb programmer), reports to Head of Library Information Systems/Development

These staff rely on many others both within UCLA as well as throughout the UC system to coordinate digital resources. Among some of these other key positions are the following: collection development, acquisitions, cataloging, public services, and systems functional areas. In addition, there are numerous staff and librarians appointed to various liaison roles to the various aspects of systemwide administration including but not limited to: decision making for shared content and acquisitions, licensing, cataloging, management and tracking, access, system integration, scholarly communication, preservation and archiving.

We also have several formal groups responsible for managing e-resources:

- o Steering Committee on Access to Electronic Resources (SCAER), to oversee policies and procedures for ERDb
- o Digital Acquisitions Database (DAD), to advise on workflow and license management
- o Digital Acquisitions Advisory Committee (DAAC), to advise on acquisition of e-resources.. There are also groups responsible for troubleshooting and ERDb training.

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.)

The primary tool we use for managing electronic resources is our Electronic Resources Database (ERDb), but the ERDb is far from the only tool we use. Others we frequently consult:
--The OPAC (Orion)
--WebTrends (usage stats)
--Our Data Warehouse project
--An in-house "Cancellation Toolkit"
http://www.library.ucla.edu/libraries/url/periodicals/CancellationToolkit.htm
--An Access database used for URL maintenance
--PID and OCLC BibPURL servers
--CDL Directory
--UC eLinks SFX KnowledgeBase
--CDL Publisher/Database Information site,
http://www.cdlib.org/libstaff/sharedcoll/protected/publisher_info
-- Publisher Package E-Resource Tracking Database (UCSD and CDL) maintained by UCSD's Becky Culbertson http://orpheus-1.ucsd.edu/disc/eresourcestracking.html
--UCSD's Roger database
--"Footprints" database (CDL Helpline)
--ulrichsweb.com http://www.ulrichsweb.com/ulrichsweb/
--Alexa http://www.alexa.com/ and Internet Archive http://www.archive.org/

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?

The fledgling ERDb has a place to record most data that is needed, and it has a helpful email feature for communicating the information. The ERDb also supports a public search interface as well as discipline-specific lists of relevant resources.

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?

E-resource management is not systematized into our organization. We need a formal structure and workflow with clearly defined roles for involved staff. (This includes troubleshooting routines and regular set up of e-resources on the proxy server.)

We are not on top of the sheer workload of inputting and editing the necessary data, and the situation was worsened by recent reductions in resources.
We lack the means of queuing the data for institutional workflow needs.
We lack a package list-building function and a good source for the data.
We need to synchronize data with the OPAC.
The CDL data flow should be integrated.
We need to get the CDL licensing data included.

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

We need resources (positions dedicated) to manage the e-resources.
We need a single, reliable, up-to-date source of acquisitions and licensing data, covering both statewide and individual UCs' data.
Both locally and at the state level, we need clearly defined roles (who does what) and we need clear communication channels (list of key contacts, org charts)
Other needs include:
Workflow tracking mechanism to provide alerts, to cue the selector through the process, to provide action reports, etc.
More responsible e-resource publishing practices: Best publishing practices; standards for notification; reliable publisher-supplied metadata (e.g., for coverage); stable URIs
Repository for perpetual access to locally-collected online resources (e.g., local online docs) as well as licensed resources (esp. when we are canceling print subscriptions)

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

Activity	Priority	Immediate/ Mid or Long Term?
Collaborative tool for systemwide collection management	High	Long term
Package Management—get it working	High	Immediate
Add workflow capability to ERDb	High	Mid or Long Term
Prioritize the data cleanup work in ERDb	High	Immediate
Centralize some E-Resource management work	High	Immediate
Get new ILS implemented; see what its e-res management capabilities are; determine what ERDb functions it can adequately cover.	High	Immediate

Finish synching ERDb data with OPAC	High	Immediate
Decide to buy or build new ERMS	High	Mid or Long Term
Connect ourselves to a new statewide ERMS	High	Mid or Long Term
Pursue Access Integration or develop federated searching	Medium	Mid or Long Term
Find out if/how SFX server contents can synergize with rest of e-resource metadata	Medium	Mid or Long Term

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

Establish a workflow and key contacts.
Set up new centralized unit.
Finish the new ERDb client.
Synchronize the data with the OPAC.
Keep an eye on commercial developments & CDL developments/opportunities.
Pursue creation of a statewide information tool.
Participate in national efforts to develop standards in this area.

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

We have no plans now. We think about it.

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

As cited in #5, we need the ability to do true collaborative collection management work. So, we really need a single, reliable, up-to-date source of acquisitions and licensing data, covering both statewide and individual UCs' data.

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

Agreement on a system.
Commitment to input the data, together with the FTE/Resources at the campuses to support the workload.
Though not licensed, government documents require lots of maintenance; we should seriously consider collaborating on this large workload, as UCLA & UCR are currently doing within Infomine.
Connectivity to the 5 different ILSs in use on UC campuses.

11. Anything else you'd like to share?

We need a timeline from SOPAG on ERMS development/acquisition, because it affects local planning.
We need report-generating capability.
Migrating to a future ERMS will be a lot easier if we adhere to standards.
It will be counter productive for campuses to develop their own ERMS that will need to function in connection with a statewide ERMS. Our local OPACs are an example of our having idiosyncratic data that is difficult to pool within a common database. Since most of us have not yet created separate silos of e-resource management data, couldn't we start off with everyone working in a communal file?