UC Electronic Resources Mangement Planning Meeting
Campus/CDL Survey
Electronic Resources Management and Systems at UCSD (excludes CDL Acquisitions)

Please complete the following questions as thoroughly as possible. 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, Acquisitions Department (reports to AUL for Technology and Technical Services)
Head, Electronic Resources Unit (Acquisitions Department) (reports to Head of Acquisitions)
Electronic Resources Specialist, Electronic Resources Unit (reports to head of Electronic Resources Unit)
Head of Serials Acquisitions (reports to Head of Acquisitions)
INNOPAC OPAC Module Coordinator (reports to Head of Arts Libraries)
Head, Serials Cataloging and CJK Division (reports to Head of Catalog Department)
SCP Manager and Integrating Resources Cataloger (reports to Head, Serials Cataloging and CJK Division)
LA IV (Electronic Resources cataloger) (reports to Head, Serials Cataloging and CJK Division)
LA V (Serials cataloger) (reports to Head, Serials Cataloging and CJK Division)
LA III (California Documents cataloger) (reports to Head, Serials Cataloging and CJK Division)
LA IV (Serials cataloger) (reports to Head, Serials Cataloging and CJK Division)
LA III (Descriptive cataloger) (reports to Head, Serials Cataloging and CJK Division)
LA V (Serials cataloger) (reports to Head, Serials Cataloging and CJK Division)
Head, CJK Acquisitions/ Cataloging Unit (reports to Head, Serials Cataloging and CJK Division)
LA III (Chinese acquisitions and serials cataloger) (reports to Head, CJK Acquisitions)
LA III (Chinese cataloger) (reports to Head, CJK Acquisitions)
LA V (Japanese cataloger) (reports to Head, CJK Acquisitions)
Head, Database Management (reports to Head, Business, Automation and Database Management)
INNOPAC Coordinator (reports to Head, Business, Automation, and Database Management)
Collection Coordinators (Social Sciences & Humanities Cluster, Sciences and Biomedicine Clusters) [these report to the Heads of their specific libraries]
Deputy University Librarian (Collection Development Officer) [reports to the University Librarian]
Library bibliographers made collection decisions in their areas (report to heads of their individual libraries or Collection Coordinators)
Generally speaking, monograph catalogers do not have permanent electronic resources cataloging assignments, but we plan on changing this.

2. What systems are your currently using to manage electronic resources decision-making, technical services, and access issues? (e.g., keeping track of license details, print subs. associated with the package, statistics, etc.)

Innovative Interfaces System
Internet
OCLC
OCLC PURL server/software
Sage (UCSD Libraries' Gateway to E-Resources)
MS Access tracking database
PID server at CDL
XML API in Innopac to export metadata to Sage; local Sage filter and record loader
MARCedit
Local program to insert PIDs
Many paper files with licenses, registrations, contacts information
Records relating to packages are stored on staff computers difficulty sharing and keeping track of these
FoxPro database for passworded electronic resources
HTML file of IP address ranges stored on campus Intranet
Usage statistics are being stored on libraries intranet
Locally developed program to replace URL's with PIDS

3. What is working with your current system of electronic resources management?

Ordering/payment information, bibliographic access seems to work fairly well

Persistent identifiers (PIDs) managed outside of the ILS has been an incredible asset for efficient database management, particularly for the SCP. There use has made URL maintenance possible and supported "portability" into other documents/resources.

The "hooks" imbedded within bibliographic records help us manage statistics and gather together packages for database maintenance needs.

Techniques for manipulating groups of records: macros, MilCat global change, etc. have been a godsend.

4. What isn't working? What parts of electronic resources management are not well covered by your current system?

Tracking licenses, contacts information, relationships of electronic resources to print subscriptions not easy to track, pricing models are hard to pinpoint, in and out migration of titles within packages are problematic, not easy to display information on license restrictions, authorized users, or resource advisories (availablility of resources).

The link between specific titles and licensed packages is increasingly important in the e.r. environment. While this info is reflected in the ILS, We suspect it could really be improved behind-the-scenes.

The complexity in constructing an easily-understood bibliographic record during this transition from print to electronic as the dominant format. To describe to our staff--and users--what we have, and what we have access to, without redundant or conflicting information, and almost inescapably subtle distinctions, is extremely difficult.

Public service providers need better access to information about what we are supposed to have licensed, both locally and systemwide. When an e-journal or database suddenly starts asking for a password, it's not easy to figure out if the publisher has deleted that from our contract, if our local license expired, etc. It is particularly difficult to find information about Tier 2 resources.

Problems of registering access for "off main campus" sites affiliated with the University.

Often confusing to our users as to whom to report problems (CDL, campus, etc.).

Our existing system of noftifying cataloging of availibility of electronic resources depends on very traditional communication methods (i.e. person to person) and is not incorporated formally within our ILS. (i.e. no physical item actually arrives in cataloging). We need a better communication mechanism for cataloging staff to contact vendors to resolve URL linking issues.

We find that we needed to synchronize data in a number of places (ILS, SFX, SAGE, etc.) which is hard to do with a multiplicity of disparate systems.

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

A system that integrates the various kinds of information in one place, that can be accessed by a wide range of users, and that is updated in real time.
The ability to display all relevant information within the OPAC to our clients.
The ability to understand license restrictions on copyright and ILL.
The need for current, consistent usage statistics.

6. What are your top priorities for electronic resources management and related systems?

Ability to track e-content of packages and pricing models.
Centralization of contact information.
Licensing information needs to be centralized and made available to users.
Ability to track vendor performance.
PID server/software stability and upgrades.
Need to continually update hardware to meet capacity demand on library systems.
Providing more timely and consistent usage statistics to our selectors.

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

Redirecting more staff to work with electronic resources management.

We are beta testing the III ERM software.

8. What vendor systems or products are you currently using or considering purchasing for electronic resources management?
        III Electronic resources management system

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

To work effectively and efficiently with CDL as their arm for the acquisition and cataloging of electronic resources.
Ability to track title movement, coordinate campus wide print subscriptions in REAL time, compare overlap in content of electronic resources.
Ability to contribute to collection management decisions on content of e-journal publishers in a systematic and efficient manor.
Ability to access e-resource usage statistics in a systematic and efficient manor.
Ability to associate Tier II resource liaisons contact information with a Tier II electronic resource record

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

Lack of standards and agreement for non-descriptive metadata elements.
Legacy metadata that would be difficult to transfer or would need to be re-keyed.
One system might need to interface with multiple and diverse ILSs.
Immature technology.
Volatile environment.

10. Anything else you'd like to share?