## GROUP SESSIONS FRIDAY A.M., MARCH 12, 2004

**Overarching Principles**
    Current
    Credible
    Reliable
    Comprehensive
    Training

### Next Steps

    Identify people working on issues
    Synthesize meeting
    Group w/in synthesis – recommendations

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## Group 1 Collection Development

All serial titles (package or not)
#1 info: Titles linked to package, publisher, w/list price, DDP, cost and campus holdings "active"
Applies to Tier I – III
Include package info (tied to print, archival copy)
Need to tag our intentions, comments, decisions that facilitate cancellation & last copy etc.
Manage current collections

## Group 2 Ongoing Management, Acq., Cat.

#1 journal 2.2 <package> mgt.
- Info about pkg.; seeing rules - 4
- Contract terms/dates; sharing licensing details
- Aggregator database management at the granular level
- Historical Acq. Info.

#2 Interoperability, reportability, customization and transferability of data between systems & services (granular) and two way info flow
- Centralization of information about workflow to reduce duplication for commonly held resources

#3 Facilitation of effective communication among individuals, UC's & CDL. Identify the functional group that will winnow out this process
- Build on the SFX model
- Ability to see what campuses have in terms of perpetual or archived access

#4 Licensing
   For Locally acquired resources
- Critical mass issues: negotiating; troubleshooting; canceling same title usage; statistics (granular level)
- Control over common money
- Expand above to all resources over time (including open access resources)
- We endorse the elements currently in the detailed requirements

Include these elements in the detailed doc.
- Impact factor, Discipline (subject), who has it , price, how many copies, status of print
- Data has to be current, credible, reliable

## Group 3 Management, Acquisitions, Cataloging

1. Batch update process, batching export/import
   Ability to do global changes (2.2.1)
   ACQ (print & electronic pricing, package/vendor/title information
   CUSTOMIZABLE in all ways
2. ACQ renewal and tracking (package, content, pricing, cancellation restrictions, print subscription status (2.2.3)
3. Store license information in fields for quick lookup with ability to link to fuller data (2.3)
4. Need for cataloging interoperability that promotes sustainability; allows customizability of access points
5. Able to produce customized reports from all data stored in system (2.2)
6. Tickler feature (2.2.3)
7. Ability to store contact information at resource level; generate email for tech support (2.8)
8. Ability to bring cancel/renewal info into ILS ( in lieu of recharges)
9. Resource advisory at local and system level – including UC e-links

## Group 4 Access Mgmt., Overall Principles, Troubleshooting, Interoperability, Linking

Overall Principles
1. Workflows that best support staff (and patrons) should drive the data flow model
2. Need common data formats for data exchange
3. Aim toward dataflows that minimize human intervention
4. Given the dynamic e-resources environment, users prefer as near to real-time updating as possible

Scenarios that prevent moving to a decision on data flows
   A. One university, one library, one ERM talking to local non-ERM systems
      (minimizes data flow –  requires more of a mind shift)
                              OR
   B. Systemwide ERM talking to local ERMS (more synchronization necessary; may be more "politically" viable)
   C. Hybrid between the two extremes (most complex?)

See separate data flow diagram (Appendix 14.ERMS data flow diagram)

## Group 5 – End User Needs
- Ability to repurpose data in other environments
- Provide context-sensitive data to users at the point of use
  (service interruptions reports for faculty)
- Who will do data quality/data review?

- Need more discussion on user interface functionality & features-sort, filter, refine
- Added 1-2 needs to original document (and DLF func spec?)

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## ONGOING MANAGEMENT/TRACKING/WORKFLOW

III does it very well – tickler feature
Customization/administrative access/branding capabilities                    Who has it
Moving titles-old package link & new package link                            How many cop.
Resource advisory – ERDb III                                                 Price
Status (check boxes for when something's been done)                          Impact factor
Bundled/unbundled print/e-resources                                          Use
Recording feedback from trial                                                Status of print
Accept outside data & automatically update URLs, record holdings, MARC records   subs. (current)
Report on non-matching records – III, SFX
See pending agreements
Publisher ID#'s          SFX can handle
Title ID in III
Co-investment info.
Ship IP address list to vendors in standardized format
Print cancellation info.
Shared print repository

All campuses + CDL
Package management:
- Package
- Publisher
- Title
- Access via multiple pts.
- Relation to print
- Price – discount
- Negotiated business terms
- K renewal dates
- Q's re:duplicated content