

FRIDAY SUMMARY, MARCH 12, 2004

Can a system change the way we do things?
Determine local workflows first

TASK GROUP

- develop (3)functional specs for (2)immediate needs based on DLF Appendix A
- determine priorities
- recommend planning process
- specs for pilot project for 2005 renewals(1)

POSSIBLE NEXT STEPS

- Task a group to translate needs to a more formal requirements document
- Define a process to help us choose
 - a. Loose coupling w/ERMS & OPAC, acq. module
→ One ERMS
 - b. Tight coupling w/ERMS & OPAC, acq. Module
→Local ERMS
- Project costs of both scenarios?
- Define how much coupling we want
 1. From our synthesis of needs, decide what needs tight coupling and what is ok to be loose
 2. Assess feasibility
 3. Determine impact on staffing/resources
- Focus on draining swamp, not shooting alligators

COMMON THEMES

- Need to map title to package relationships consistently & comprehensively but don't forget:
 - non-active titles
 - non-package titles
 - print titles
 - non-licensed items?
- Overall principles – reliability, etc.
- Title level detail
- Automatic updating
- Shared view of local & shared
- Track pending decisions
- Customized reports
- Sustainability
- Repurpose data to other systems
- Descriptive metadata at point of use
- Common data formats
- Define authoritative source(s) for data

PRINCIPLES

- Goal: Workflow do not require human interaction
- Credible, reliable, consistent, standard
- Data exchange interoperable

SHORT TERM (0 – 6 months)

- Need central ERMS
 - Need relief
 - Go back to needs
 - Synthesize small group discussion
 - 1 person from each group = group (cross functional)
 - Look at existing systems
 - RFP vs. RFB
 - ERDB? \$\$\$
 - Establish needs & priorities
- # 1 Pilot
high level functional specs.
Start w/DLF, add what's missing,
prioritize
trial UCLA model

MEDIUM TERM (6 – 18 months)

- Coupling Question
Influence vendors w/our RFP needs

LONG TERM (18 + months)

- RFP process (full)
- Vendor solution for consortial needs (2 + years?)