

Task Group for Systemwide E-Resources Workflow Efficiencies

Background

UC staff at UC San Diego (Systemwide Collection Services) and Oakland (CDL) currently manage, create, and maintain a variety of data pertaining to systemwide electronic resources in four disparate systems: Serials Solutions ERMS/Knowledgebase, SFX Knowledgebase, OCLC, and UCSD's Innovative Interfaces bibliographic module. Readily acknowledged is that much of the bibliographic and holdings data in these systems is redundantly managed, created, and maintained. Also readily acknowledged is that, except between OCLC and UCSD's III system, there is not 100% record correspondence between the records as currently maintained in each of the systems and there is insufficient interoperability between systems.

On July 1, 2010, the CDL Acquisitions Unit and the Shared Cataloging Program Unit (SCP) were paired together under a new administrative unit, Systemwide Collection Services at UC San Diego. Bringing together most of the CDL operational staff managing, creating, and maintaining the data in these disparate systems, this union affords the opportunity to investigate alternatives to current workflow processes to see what operational redundancies can be reduced or eliminated, whether through improved interoperability or other means. To this end, the Task Group on Systemwide E-Resources Workflow Efficiencies is charged to:

Charge

Taking into consideration user needs, staff management and reporting needs, current functional capabilities, additional vendor services, available external technical processes, and operational limitations, examine Serials Solutions, SFX, OCLC, and III to review existing ERMS-SFX-SCP workflows for systemwide resources acquired and/or managed by the CDL and/or cataloged by SCP with the aim of improving efficiencies and reducing redundancies:

- Recommend practices or other vendor services to, insofar as possible, eliminate the redundant recording of bibliographic and holdings data
- Recommend policies and best practices for tracking and syncing data among the various systems
- Determine the feasibility of establishing a "database of record" for holdings and coverage data for systemwide resources as input to any NGTS groups that may consider this issue more broadly
- Identify any practices and data standards that vendors and knowledgebase providers could adopt for more efficient and effective data flows between systems

Secondarily, also explore the feasibility of and make recommendations for:

- Tracking perpetual rights
- Tracking historical holdings information

Task Group members should consult as needed with other UC staff, such as members of the SCP Advisory Committee or CDL's ERT Group, or externally, such as with individuals at institutions who have direct experience making use of relevant vendor services and/or products.

Deliverables, Membership, and Timeline

Provide preliminary and final reports to Ivy Anderson, with copy to Martha Hruska.

Membership

- Becky Culbertson, SCP
- Maria Figueroa, CDL Acquisitions
- Adriana Moran, CDL Acquisitions - Chair
- Margery Tibbetts, CDL
- Adolfo Tarango, Head - Systemwide Collection Services, ex officio

Timeline: Preliminary report - January 31, 2011; Final report - March 31, 2011