Tech Services Working Group breakout session

ULMS Kickoff Meeting, Fresno, March 22, 2016

ERM Task Force discussion notes:

Top priority is recommendation on ebook/emedia record migration for the system, in time for final load.

Lots of confusion about KnowledgeBase, interaction with SFX targets, whether MARC records are coming from the CZ and how and for which type of material.

Workflow for eresources (not bib records, e-only) including acquisitions was another big topic. Question arose about migration of services from SFX into NZ vs. IZ in vanguard loads. A checklist for post-migration might be useful; Jessica & vanguard campus should be able to supply.

Perhaps we can ask vanguard campuses for summary on the issues they faced with eresources migration (help to sort out whether issues are local or systemic)--become part of checklist. Repeated Dave's advice about choosing a sample of titles from various sources (migrated locally, migrated from chancellors, video, ebook, etc.) noting what you did, and then checking post migration to see how they turned out.

The process of activation (workflow, stepping through, post-migration) was also the topic of a question.

Question raised about level of permissions to add/delete records at the NZ level. We note that the question is different at as regards bib records and e-resource packages. Would be made at a higher level than this particular task force.

Timelines? A post-migration checklist for test load would be near term priority, to be followed by final-migration checklist.

We cannot get up a recommendation on ebook/media migration in time for test, but yes, we will get one up in time for the final load.

What about migration of ERM records (licenses, etc.) --in general, the recommendation is to rebuild it from scratch. Moon says that the U Washington licenses migrated cleanly. Christine noted that there's a need to export the data into a readable form (excel, text) to protect it so you won't lose any of it.

Yes, there are plans to work on consortial acquisitions processes & ERM data, Jessica is getting training. Workflows for this also must be discussed. ECC will be all Jessica; for opt-ins, more processes for libraries involved.

Need to talk to systems folks about making sure the CPO's can be automatically processed in ALMA.

Jessica will share San Marcos' post-migration cleanup process of their ebooks.

BTW we are the only consortium with this particular variety of centralized purchasing, so we have no models to work from; we are inventing it as we go.