ERM Workflow Meeting, 12/5/06

Present: Fong, Gobrecht, Helgoth, Holladay, Lamboy

Linda updated the group on her work with the resource records since the last meeting. She has spent much of her time on renewals while adding contact records to those renewals she is working on that do not have one yet. Her priority with scanning the licenses has been to work on the big packages and at this time we are less than halfway through the licenses. Candy noted that when she ran a list there were 485 records with a “t” code.

The group took a look at the General Guidelines page for licensing terms (http://libraries.colorado.edu:2082/screens/guidelines.html) to see what changes should be made. The suggestion was made to change the document’s title to General Terms of Use and to possibly rename the two columns as “usually ok” and “usually not ok”. Additionally, the link from the catalog will read “General License Terms” instead of “General Guidelines” since guidelines too tame. On this site there should also be a link to the Database Licensing FAQ page and to some general copyright information – Yem is not happy with the university’s copyright statement so the group agreed to individually see if they can find a better site with copyright information. Sara will mock up a draft of these changes to be reviewed and brought before the January ERM meeting.

NOTE: After the 12/6 ERM Meeting, it was decided that the name of the document will be “Terms of Use” and the link from the catalog will also say “terms of use”. Meredith will be making these changes and sending the new URL to Sara for a global update.

Candy has been putting the subjects and descriptions in the resource records. Instead of asking Linda and/or Gloria to notify her of each of their resource record updates, Candy will instead run lists to stay updated. Candy reported that she feels caught up and on track. She has also been playing around with the “p” code, which are the resource IDs for the coverage load. Candy noted that she is looking ahead to the changing A to Z list as she has been assigning “t” codes and there was a discussion over the use and difference between “t” and “x” codes.

While going through the subject list (http://ucblibraries.colorado.edu/research/findarticles/index.htm) to determine which local subjects need to be added to resource records, Candy found that there are many resources in the subject list that do not have resource records (less than half of them). This raised the question of whether or not free resources should have a resource record or not. Candy has been making note of those resources without a resource record. It is not known whether or not these resources have bib records in Chinook. This issue would impact the bibliographers greatly and ties into the question of what to do about the subject guides if these pages become dynamic, based on ERM. Linda suggested that there could be a difference in names that would account for some of the “missing” resource records – a resource may be called one thing in ERM and another thing on the subject list.
Another issue that was raised was how to handle single journals with licenses. It was suggested that if there are special terms for that journal that we would need Serials Solutions to do a separate entry for it as a database in order to clarify those special terms. The workflow for this process was determined to be:

1. Linda will determine through Serials Solutions if something is a single journal; if it is, she will let Sara know when sending her the license.
2. Sara will review the license; if there are special terms in the license, she will let Linda know of those terms.
3. If there are special terms, Linda will let Candy know so she knows how to turn the resource on.

Candy mentioned that as per an e-mail, she has spoken with John about using the “q” code as a general/interdisciplinary local subject for those records that include an enormous number of subjects. This would help the public display issue for those records. Candy believes this brings up some general issues of communication with bibliographers regarding subject headings.

Sara noted that about 70 license records are in ERM at this time with several more coming each week from Linda. Sara has only been able to add about 3-4 a week right now but is still consistently adding them. Yem noted the need for license revision to make sure that the information in the licenses is accurate. Gloria will run a list of all licenses from the first one through to the end of September for Yem and Sara to review. Sara will make sure that the licenses done prior to her arrival are edited to match the way she has worked on them this fall. The highest priority will be the big packages.

Additionally, Heather had sent an e-mail regarding the workflow process that occurs when a patron requests that a free resource be added to Chinook. It was decided that it should be the bibliographer who decides whether or not the resource should be added. Yem would like to discuss this issue with the bibliographers.

The next ERM workflow meeting has tentatively been set for the second week of January with date and time to be determined.