Serials Solutions consortial system

Pros Cons

RM
- Record loads into III - requires considerable attention for week every month. Wear and tear on body and soul. Impact on patrons (updated holdings, public display inaccurate and slow), staff (stress and ability to focus on other work) 10-20 hours per month. Some of the time saved could be spent handling more frequent Serials Solutions MARC updates loads, keepy Voyager and the ERM in closer sync.

- License, resource, contacts information already in knowledgebase for many resources - III system is all hand entry for resource and license records.

Selectors will be able to access the system with relatively little training to view title lists, license terms, contact information. As a web based tool, this will be possible remotely (during a conference). III system has limited simultaneous connections and requires considerable training to get new users up to speed.

COUNTER
- Annual harvesting of usage statistics - This will be mostly automated - SUSHI compliant resources each month, Non-SUSHI resources 2x yearly. System alerts us when changes are coming, usage harvesting data is out of date. - Sally Lockwood currently spends 12 weeks at about 75% of her time to harvest. If we can recover 50-70% of this time to handle only the more complicated issues and updating the system, considerable effort is recovered.

- Selectors will be able to access the system and make custom consolidated reports. This is possible, but complicated in the current "system"

RM-CE
- Platform changes and other resource maintenance - One person/process can make the changes for both institutions when both CULs have content in the same collections.

- Alerts monitoring

- Comparison of e-collections will be considerably easier. This will help with collection development decisions, shared workflow.

Make a specific recommendation on whether to implement the Consortial Version of Serials Solutions at both institutions or hold off on integrating e-resource management and data migration until we have a shared LMS;

What do we need to know/estimate

Alma timeline

Cost - Cornell to switch to SerSol, additional cost for 2CUL consortial? 2 years? 3 years?

From Kate Howe:
"I have priced out RM and Counter for you with a 20% discount for the bundle:

Counter: 10,450/year plus onetime set up 688

RM: 11,693/year plus one time set up $1969 (includes data population services) and a onetime consultation fee of $3990"

I am still working on the upgrade fee for the consortia part of RM for you and Columbia and will forward to you as soon as I have it.

For consortial:

I am so sorry about this delay (Joyce – got your vm today). I was on vacation for two weeks and am just returning. I checked with Ashley on your notes below and her comments are below. If this makes sense to you, we can set up the pilot project. To do that, we would want Cornell to subscribe to RM with the pricing that I sent Jesse earlier and then we would ask for an “upcharge” for the consortial version. Standard pricing is about 20k for you all but since this is a pilot (and you all are good PQ customers), we can cut that to 8K for the year of the pilot and see how it goes. There is also an implementation fee of $2,000 and a consulting fee of $3995. We can create a statement of work to be sure we are aware of what the implementation looks like. This will allow you to take time to work on the project without limitations and see how it works for you.

Let me know if this is the direction you are thinking of going and we will keep working on it.

Implementation effort vs. how much effort might this save during Alma implementation

How ready is/will be Alma when it will be available and/or when we go live (Boston College?)
How does the consortial version affect workflow - can we activate a resource at both places. Can we handle migrations simultaneously.

Is there a "migration" process for the consortial side? i.e. how do we move Oxford Journals package from 2 separate entries to a "consortial"

Benefits

Allows some amount of standardization of records between 2CUL partners before moving to single LMS

Know what each other has. Common and different content - apples to same variety of apples. This can be a building block for Coll Dev activities.

Mess of merging can be addressed in Ser Sol, making it cleaner in Alma.

Helps achieve Mellon Grant goals earlier

Costs/Risks

$ for licensing Serials Solutions system at Cornell and consortial for 2CUL

Cornell maintains database and ejournal discovery through III ERM. These services would need to be replicated.

Scenarios

ASAP - put Serials Solutions system in place

If Alma available soon? - Go "live" with e-resources before the rest?

If Alma wont be available until ?????

Serials Solutions shortcomings

Speed of web based processes

Searching (same as Ser Sol KB) needs contacts and other elements for searching

SerSol 360 RM implementation at Cornell:

What does this involve

Scripts for record loads - SerSol/Voyager/ERM others? Google Scholar? Pockets of vendor records, authentication levels - All Cornell vs. No Medical

Public interfaces - Database Names and eJournals - Some investigation happening in Cornell's Discovery & Access team to run Database search from Blacklight - need to bring in some license record information

Authentication - further investigation into how SerSol can handle nuanced permissions (no-med, all cornell, etc...) -

Migration work - offer of help from a temp position at Columbia - sounds delightful.

- collections
- cost data
- usage? into 360 COUNTER
- vendor records reps/admin data - which of these can be hidden/limited view?

Potential timeline -

- Summer 2014
- Consortial aspects TBA

Who to involve at Cornell:

- Gary Branch (Batch processing) - scripts
- Adam Chandler - KB
- Chris Manly - III ERM hosting, scripts, possible authentication changes
- Pete Hoyt - scripts, authentication
- Discovery & Access - Blacklight for discovery
- Bill/Jesse/Liisa/ e-resources unit -workflows
- Rich Entlich (Usage)
- Public Services? ILL? Reserves?
- Selectors
Timeline:
Draft proposal to group by January 6 (Jesse)
Proposal to TSI Steering Mid to end of
Decision by Early March? - dependent on process
Tentative - Call with SerSol
ALA - Meet with SerSol - Ashley, Kate, etc... - Joyce, Jesse, Possibly Jim, Xin, and or Bob.
III_ERM contract ends August/September
To include -
how does this apply to Mellon
how does this help 2CUL
- pricing benefit for SerSol products?
how does this help Cornell?
Questions from ERNIE:
360 COUNTER -
- How migratable is data and admin info to another system?
- flaws of COUNTER - title changes, ceased publication, others - Does 360 COUNTER help?
1/14/2014 Call with Kate Howe and Ashley Bass
Roadmap:
Plan to move existing customers to Intota platform later this year - this seems to be happening regardless of suite of services used - September? Perhaps later? Consortial would delay this to possibly December
- Data will move
- Changes will be in the user (staff) interface
- Consortial functionality will carry over
Intota with all functionality?
Timeline for us: Implement existing system, some time months to year after, change over to Intota platform (target goal for first live INTOTA customer = May 15 / June)
- Consortial decision determines when we would move. If we want consortial immediately, we would wait. If we can wait for consortial, we could move sooner
- Does consortial help us migrate and/or get up and running sooner? I.E can Columbia helps us populate things more easily under consortial?
- Work for consortial - What does "parent" look like? Is one of us the parent or do we make a 2CUL parent?
- scenarios: Clone Columbia account to be parent account of both Cornell and Columbia - pros/cons?
- fresh parent account?
- What do we load/enter from III ERM, what do we populate from "parent"
- License uploader
- Contacts uploader
- Can provide them a spreadsheet of admin login info.
Upcharge to Intota Assessment once migrated to platform? Stop paying for COUNTER start with Assessment - Net change (~$10,000-18,000) each?
10:30 Sunday - ALA Meeting - Bob/Joyce, ask Xin.
Migration
- We can export data from III ERM into spreadsheets or text files. Can these be migrated? How successfully? Any customers that have done this that we might be able to speak to?
Resource Manager:
- We believe there used to be a "Custom Proxy URL" field that could be used at the provider, database and/or title level. This doesn't seem to be there now. Cornell currently uses a few different proxy URL prefixes to sort out different levels of access between our main campus and medical campus.

- Consortial -

Meeting at ALA? - Can we come up with a few times then see if we can get Bob Wolven and Xin Li