

## UC Campus Options for Syncing SFX Data with ERMS Systems

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	Innovative Interfaces ERM	Serials Solutions 360 Resource Manager
<b>One-time data population</b>	Yes	Yes
<b>On-going data syncing (SFX to ERMS)</b>	Not ready for prime time. Limitations: <ul style="list-style-type: none"> <li>• Complete overwrite of data each time (no way to indicate changes or deletes).</li> <li>• Neither SFX nor ILL knowledgebase tracks deletions or last changed date. (This may change as NISO KBART recommends knowledgebase standards.)</li> </ul>	Not ready for prime time. Limitations: <ul style="list-style-type: none"> <li>• Complete overwrite of data each time (no way to indicate changes or deletes).</li> <li>• Neither SFX nor SS knowledgebase tracks deletions or last changed date. (This may change as NISO KBART recommends knowledgebase standards.)</li> </ul>
<b>Importing</b>	Discuss options with vendor.	Discuss options with vendor.
<b>Data available (for importing into your ERMS)</b>	CDL provides: <ul style="list-style-type: none"> <li>• CDL data in SFX</li> <li>• Campus data in SFX</li> <li>• Both combined</li> </ul>	CDL provides: <ul style="list-style-type: none"> <li>• CDL data in SFX</li> <li>• Campus data in SFX</li> <li>• Both combined</li> </ul>
<b>What CDL does (upon request)</b>	CDL runs an export script to create a file. CDL alerts the campus requestor via email that the file is available for pickup from the CDL server. CDL can set this up as an automatic workflow tied to SFX knowledgebase updates.	CDL runs an export script to create a file. CDL alerts the campus requestor via email that the file is available for pickup from the CDL server. CDL can set this up as an automatic workflow tied to SFX knowledgebase updates.
<b>What campuses do</b>	Discuss options with vendor for one-time vs. ongoing import. Your campus runs the Saskatchewan script on the file output by CDL.	Discuss options with vendor for one-time vs. ongoing import. Limitations: <ul style="list-style-type: none"> <li>• You lose volume and issue in Serials Solutions (their knowledgebase only tracks year.)</li> </ul>
<b>Exporting from local ERMS to SFX</b>		Serials Solutions has a report (SFX-format report) that exports data from Serials Solutions for loading into the

		<p>SFX data uploader. <i>The report is still a work in progress.</i></p> <p>Limitations:</p> <ul style="list-style-type: none"> <li>• The report loads the data as all or nothing (i.e., you cannot limit to only records that have changed since the last load.)</li> <li>• You lose volume and issue in Serials Solutions (their knowledgebase only tracks year.)</li> </ul>
<b>What CDL does</b>	CDL could help with mapping for SFX data load (from III ERM to SFX)	CDL is not exporting data from the CDL Serials Solutions ERMS at this time.
<b>What campuses do</b>	Depends on their export destination.	Depends on their export destination.
<b>Troubleshooting</b>	If a problem is reported, CDL will verify the file was created and contains data. The campus may need to work with vendor or Saskatchewan script owners (University of Saskatchewan).	If a problem is reported, CDL will verify the file was created and contains data. The campus may need to work with vendor.
<b>Additional Comments</b>		<p>CDL paid Serials Solutions to manually load CDL data. CDL used three data sources:</p> <ul style="list-style-type: none"> <li>• SFX data</li> <li>• Shared Cataloging Program records</li> <li>• Manually created</li> </ul>

More information on ERMS systems on vendor websites:

**Innovative Interfaces ERM:** [http://www.iii.com/products/electronic\\_resource.shtml](http://www.iii.com/products/electronic_resource.shtml)

**Serials Solutions 360 Resource Manager:** <http://www.serialssolutions.com/360-resource-manager/>

## Standards (in Progress)

NISO Knowledge Base and Related Tools (KBART): <http://www.niso.org/workrooms/kbart>