Systemwide Licensed Content Lifecycle Management
Video Transcript

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Hi there, my name is Holly Eggleston, I'm the electronic resource analyst in the systemwide licensed collections group at CDL. This video will give a quick high-level overview of how systemwide licensed resources are managed after the negotiation and approval process. As relevant, I'll point out related services and activities that you may find useful when working with these resources.

Once a Tier 1 or Tier 2 resource is approved by the members of the Collection Licensing Subgroup, the resource enters the lifecycle management phase, which includes all tasks related to launch, platform and content changes, cancellation and overall management.

For Tier 1 (and many Tier 2 resources), most of these tasks are performed by CDL staff on the Electronic Resources Team or ERT.

The members of ERT include most of the CDL licensing team as well as representatives of other CDL teams that provide services and infrastructure that integrate and support with the systemwide licensed resources, including CDL's Discovery and Delivery group, the Shared Cataloging Program and CDL Acquisitions.

In addition to communicating over email, the group meets weekly to complete lifecycle tasks for new and transitioning resources, troubleshoot reported problems, communicate issues from their services and discuss emerging issues that affect licensed resources.

When a resource is approved for systemwide licensing by the Collections Licensing Subgroup, the information is passed to the ERT team to centrally handle infrastructure and resource configuration, support and announcement.

•Provides information to campus proxy contacts for proxy configuration

•Verifies campus access via campus remote access methods

•Configures and creates shared access points such as the link resolver and catalog

•Configures resource interface as needed

•Sends launch announcements to CDLInfo and Users Council.

Later in the resource lifecycle, when there are major changes to existing licensed resources, the ERT team provides support for these processes, including:

•Coordinating migration to new platforms, interfaces or vendors

•Obtaining perpetual rights content and securing ongoing access, either via a trusted third party or via local hosting.

•Facilitating a dual access period and notification to allow time for librarian education and updating of support materials.

In addition to the lifecycle areas covered in the other overview videos, there are additional services and resources that you may either hear mentioned or that you may find useful when working with systemwide licensed resources.

UC Elinks is a service that provides an easy way to move between an article or book citation and the actual publication content. It allows users to link to electronic full text content when available, and facilitates location of print content and/or submitting interlibrary loan requests.

The UC Elinks icon can be found in many subscribed databases and within Google Scholar. UC Elinks is also accessible from many item level catalog records that use the OpenURL syntax.

UC Elinks is based on the ExLibris SFX software and hosted in the cloud. The systemwide and multi-campus holdings information is maintained by members of the CDL Discovery and Delivery and CDL Acquisitions teams, and SFX liaisons at the campuses manage local holdings information.

The technical requirements document enumerates CDL expectations and standards for electronic resource functionality for vendors. It also provides supporting information for escalated/reported issues and a reference for assessing our currently licensed resources. The most current version of the document can be found on the CDL website under the Gateway for Vendors.

The Key Issues for Vendors provides information for librarians attending the major annual library conferences. Annually distributed via email in May, this document enumerates topics for librarians to proactively address with vendors (Budget, new policies) as well as providing background information on active UC issues (new policies, major vendor negotiations, other

active issues.)

The Resource Liaison Program is coordinated by CDL and consists of campus librarians from across the UC system. With over 300 systemwide licensed resources, the Resource Liaisons provide a crucial role in helping CDL and the campuses to stay apprised of issues with our systemwide resources.

The Resource Liaison serves as the "resident expert" for a resource and/or platform, providing information on vendor performance and resource content to the CDL and the vendor. The Resource Liaison is also responsible for sharing information and soliciting opinions from colleagues regarding their assigned resource. It is a role that involves UC-wide activity and visibility.

Librarians serving as Resource Liaisons are regular users of their assigned resources, and are familiar with the resource functionality, as well as with the subject area and how their resource fits within the collection.

RLs provide feedback on assigned resources via an annual survey and directly as needed.

The responses collected via the annual resource liaison survey informs the Technical Requirements Document, the Key Issues for Vendors and upcoming vendor negotiation strategies.

For a list of current RLs and their assignments, please see the Resource Liaison Website.

We are always interested in growing our group of Resource Liaisons. If you're interested in becoming a Resource Liaison, contact me directly for more information.

For more information about activities and services provided to support systemwide licensed resources, please see the CDL website licensed collections pages.

We are always interested in your feedback and suggestions and want to know how best to support you.

If you have problems with or questions about a systemwide licensed resource or any of the services and resources mentioned, please contact CDL Helpdesk and they can put you in touch with the right person.

If you have questions about this presentation, please contact me at holly.eggleston@ucop.edu.