

OLE Project Regional Workshop - University of Kansas, December 16-17, 2008

Process Prioritization Exercise				
Process/Activity	Core	Significant	Shift	Stop
Systems				
interface with campus Bursar	1			
install new releases		2		
maintain 3rd party interfaces (security certification proxy)				
campus authentication LDAP		5		
system and database backup	14	1	1	1
create use accounts			1	
define set permissions			1	
z39.50		1	1	9
interfaces - API import/export	3		1	
tie into financial systeks			2	
information security			2	
proxy access authentication		1	7	1
authorization (roles)	2	1		
patron accounts				1
create patron records manually		1		
Manage open URL	1		1	
configuration		2		
data policy	3			
documentation	1	4		
development of system by community	1		1	
training and transparency	2	1	1	
new purchase announcements, list RSS feeds, TOC		2	1	
ease of administration		1		
rules development and management	4			
update cost data in circ module for lost books				1
Resource Description				
Oversee metadata standard			1	
create bib description for electronic resource				1
bib cat			1	
create records fro D space resources			1	
describe/catalog	13			
overlay acq. Record with better cat record		1		
copy cataloging			3	
describe manuscripts in EAD	1		2	
describe images	1	1		
organize e-resources	2			
gift notes for records				5
prep of non MARC records	1			
batch edit MARC records	1			
MARC records foe e-resources	1			
load bib records for e-resources	3		2	
import MARC records	3			
batch load	5	6		
extraction of data	2	4		
global data changes	2	3		
authority records	3	2	4	5

Process/Activity	Core	Significant	Shift	Stop
e-resources records (out of scope)		1		1
maintain bib records	1	3		
edit bib item holdings and authority records	1	4		1
holding and suppression of records	1			
database maintenance	3	1	1	
process physical items		6	2	
train staff to use cataloging function			6	
manage URL links in records		3		
articles information components management	1			
digital preservation management		1	3	
records management (archive - retention schedules)		3		
Acquisitions				
Negotiate and manage license agreements	5	6	1	3
Distribute /publish terms and conditions			1	
Manage e-journal package orders, renewals	4	6	2	
Set up trials for e-resources			1	2
Create usage data on e-resources			6	
Promote e-resource to "live"		1		1
Incorporate digital collections	7	3	2	
Add and maintain resources in federated searches			4	
Receive/activate access to materials		8	3	
Order material in all formats	14	3		
Purchase on demand	2	2		
Manage fund allocations	2	1		1
Input Acq info from vendors by hand				5
Receive invoices from vendors	1			
Input invoices and credit memos			1	
Oversee materials budget	7		1	1
Enter info for e-resources into ERMS		1	1	
Balance funds	2	3		
Track standing orders				6
Claiming	2	1	1	18
What's at bindary?				6
Track serials receipts			6	1
Journal binding			1	17
Holdings maintenance		1	1	
Communication				
e-mail a lot			3	2
communicate with vendors		1	1	
communicate with tech support at vendor			1	
Communicate with customers	7			
document processes		2	3	
Circ/ILL/Ref				
Renew book	2	1		
Inventory management	2			2
Circulate materials	15	1		
Course reserves		2	1	
e-reserves	1		6	7
ILL Doc Delilvery		1	4	

Process/Activity	Core	Significant	Shift	Stop
Place requests - storage	1			
Place holds			2	
Collect library charges (fines, fees, lost)	3	1		10
Deliver materials to patrons				4
troubleshoot access problems				
request materials from other libraries	2	1		
provide electronic docs	1			
Check library inventory	2	3		
Determine ref - non-circulation		1		1
System Admin				
Reporting	9	13	1	1
Collections analysis	3	6	1	1
Gift reports			3	2
Queries		3		
Search/retrieval	3		3	
Scripts		2	3	
Preservation	2	1		
Regulatory Compliance			1	