ERM & All of Us: Workflows after Re-Organization

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POTOMAC TECHNICAL PROCESSING LIBRARIANS

88th ANNUAL MEETING
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Overview

- Context
- ERM and ERMS: Why?
- Expectations- ERMS
- Expectations- ERM, Re-Organization
- Changes in Work Flow
- Lessons Learned

Context

- ~25,000 FTE
- Distributed Library System
- $$$$
- Entering Season of Major Change
  - Fenwick Library Addition 2012-14
 - New University President

Context

- Resources and Collection Management Services
  - Special Collections and Archives
  - Collection Development and Preservation
  - Technical Services Group
- TSG Re-Organization
  - Serials, Acquistions, Cataloging
  - Resource Acquistions, Resource Description and Metadata Services, Payments Unit
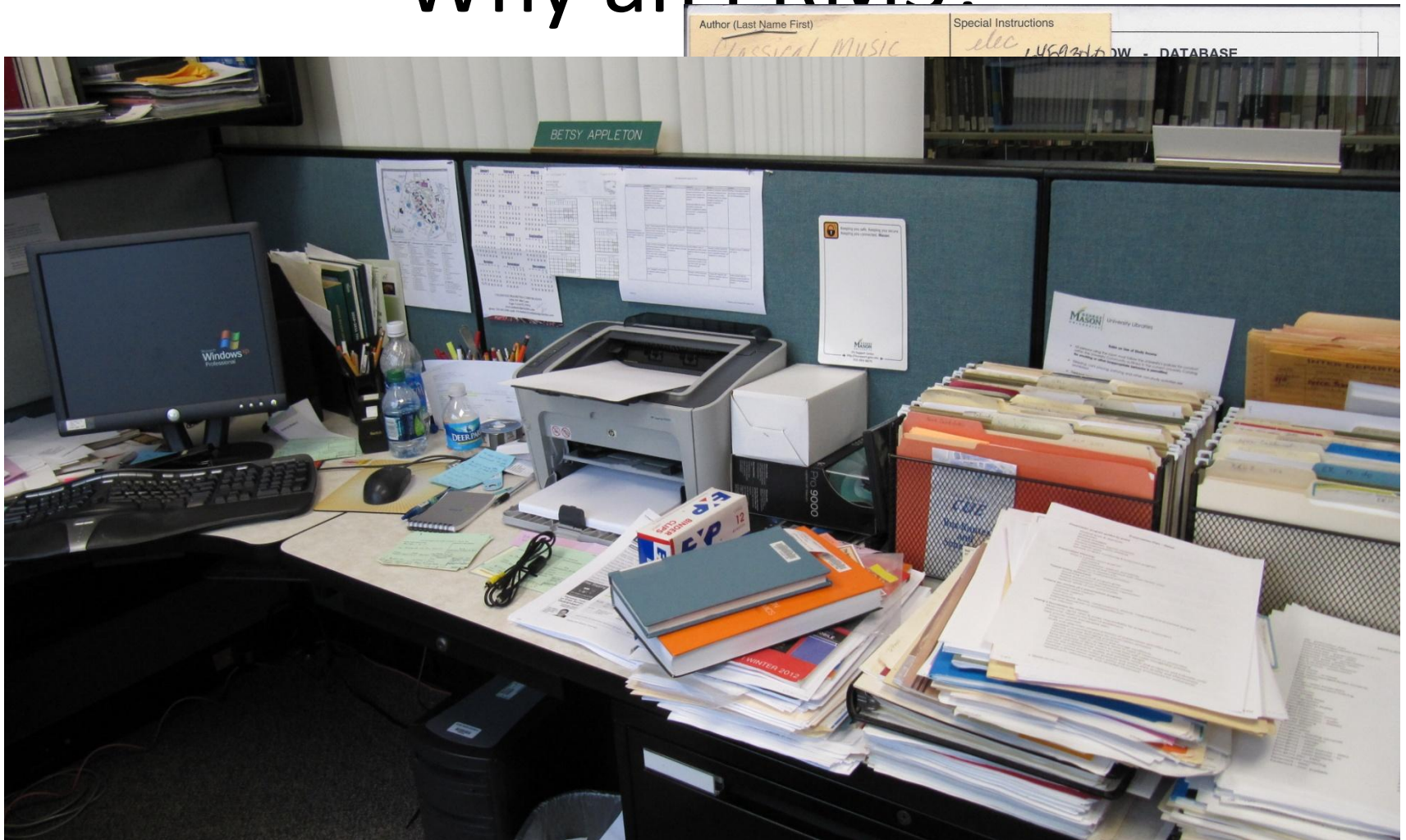- E-Team Concept: CDP, TSG, Digital Projects & Systems (DPS)
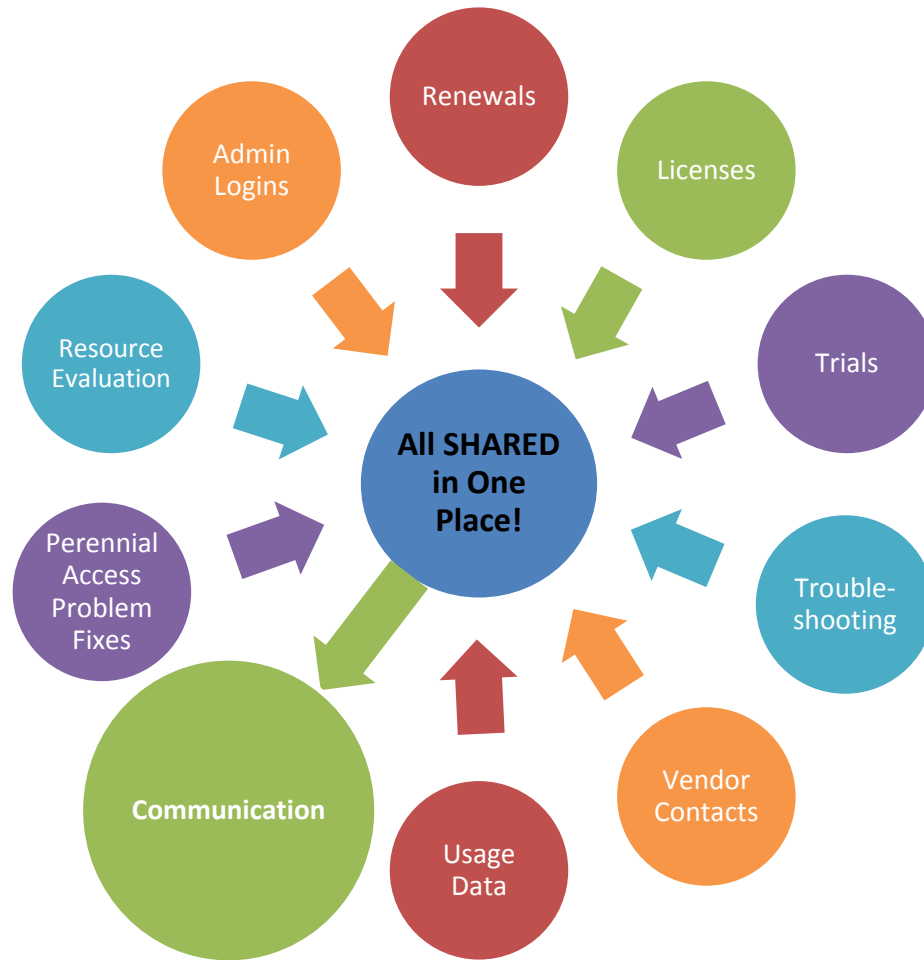
Why an ERMS?
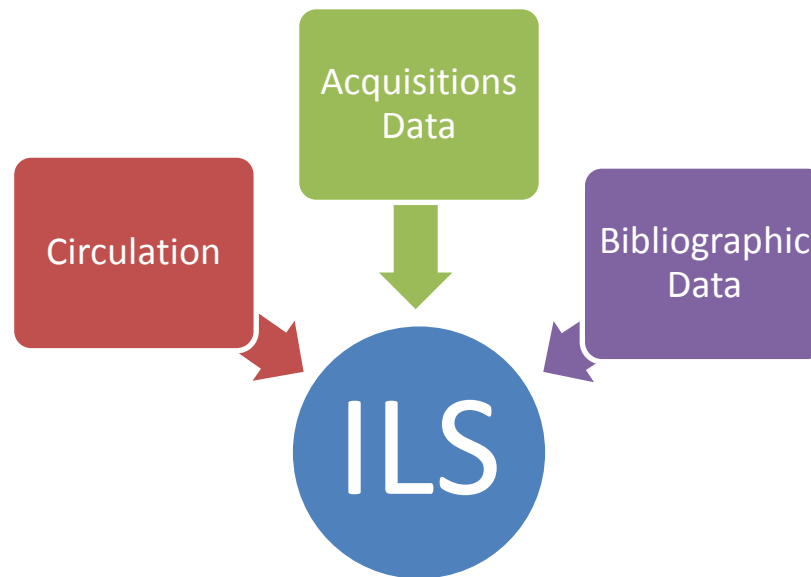
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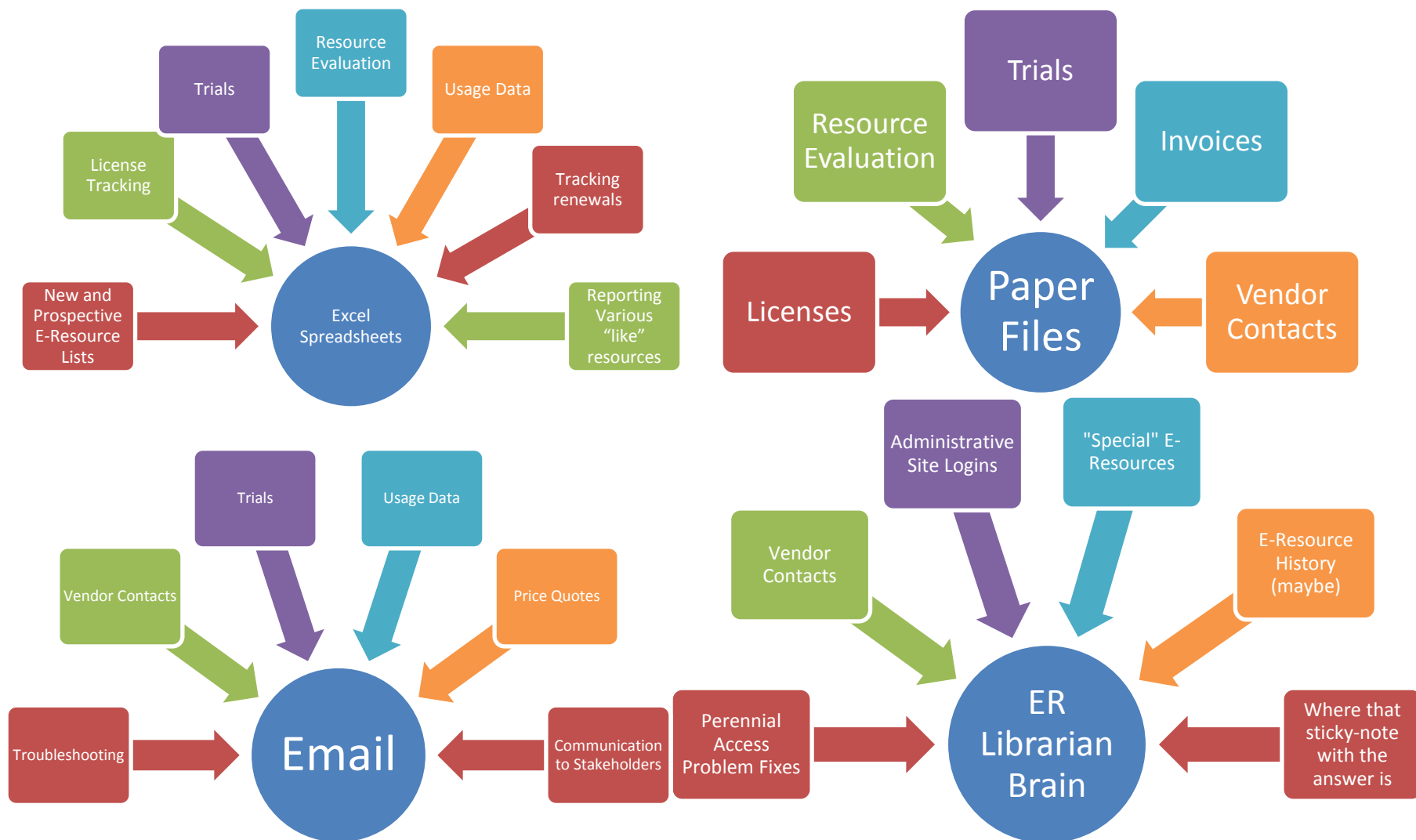
Why an FRMS?

Why ERM? Why Re-Organization?

- ER Customer Service could improve
- Communication Breakdowns
- Unsustainable, inefficient work loads
  - Too much AND too little
  - Re-aligning work among appropriate departments

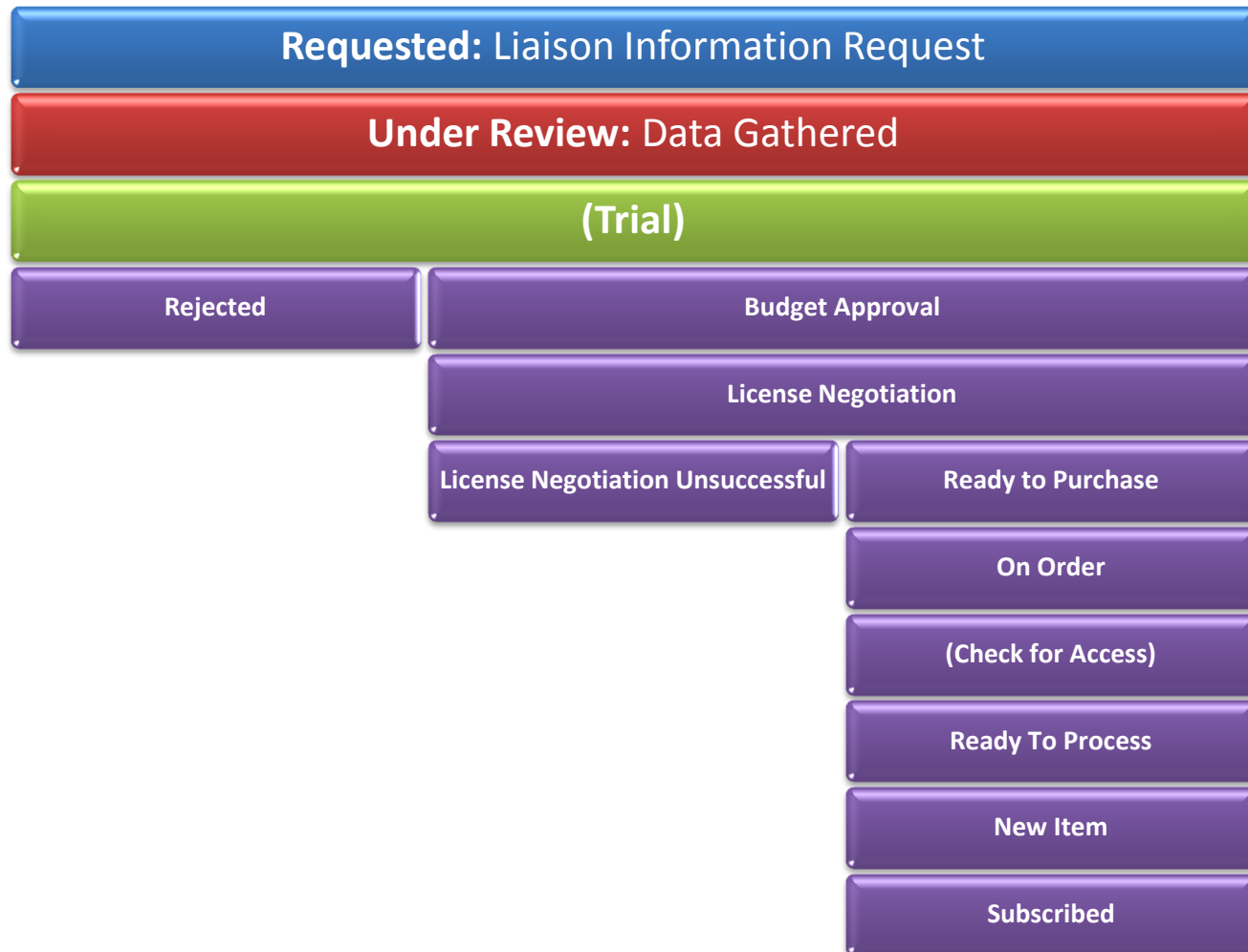# ERMS Expectations

ERM, Re-Organization Expectations

Realistic

- More staff resources devoted to ER
- Record of Institutional ER Knowledge
- Less time spent hunting for answers
- Fewer paper files
- No more ERM on paper forms
- Passive communication improvements

Highly Unrealistic

- No more duplicative spreadsheets!!
- Public services could use ERMS like the ILS
- Full implementation in a year, while re-organizing the Technical Services Group

Changes In Work Flow: ERMS

Requested: Liaison Information Request

Under Review: Data Gathered

(Trial)

Rejected	Budget Approval
	License Negotiation
License Negotiation Unsuccessful	Ready to Purchase
	On Order
	(Check for Access)
	Ready To Process
	New Item
	Subscribed

Changes In Work Flow: ERMS

Changes in Work Flow: Re-Organization

- LOTS of training needed
- Everyone has a backup
- Communication as part of work flow
  - Alerts to Liaison Librarians, The Purchase List
  - E-Resources Distribution List
  - Weekly meetings, Tracked Resources Reports

"I Got Your Back". http://www.stickmanknows.org/stickman-jokes
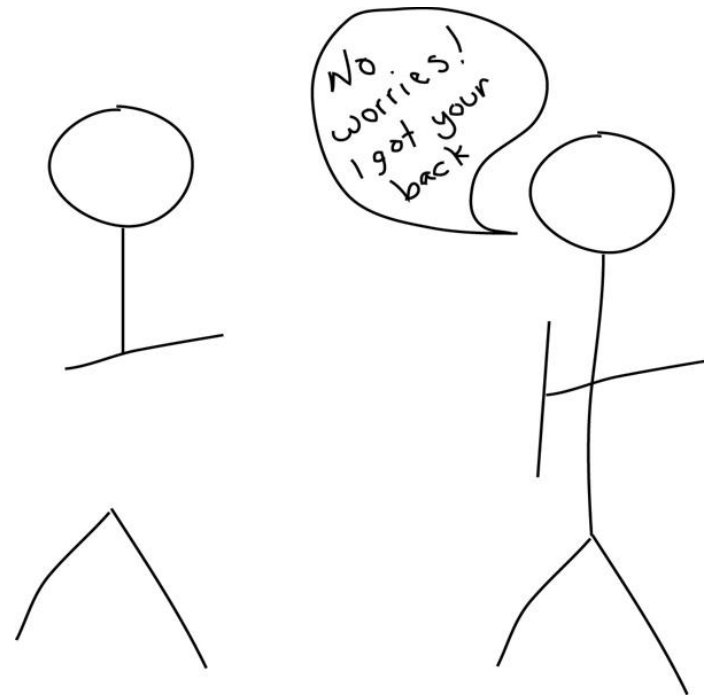
Lessons Learned

- *"In theory there is no difference between theory and practice. In practice there is."*
- **ERM is only as good as its implementation.**
- **Weekly meetings are still useful- Agenda topics: "~~Where is it~~" "What is THAT?!"**
- **We still need spreadsheets, but they are generated/informed by the ERMS.**
- **Communication needs to be part of the work flow.**

Questions?

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