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, Acquisitions, Cataloging
  – Resource Acquisitions, Resource Description and Metadata Services, Payments Unit

• E-Team Concept: CDP, TSG, Digital Projects & Systems (DPS)
Why an ERMS?

- Circulation
- Acquisitions Data
- Bibliographic Data

ILS
Why an ERMS?

Excel Spreadsheets
- Resource Evaluation
- Usage Data
- Tracking renewals
- Reporting Various "like" resources

License Tracking
- New and Prospective E-Resource Lists

Trials
- Email
- Troubleshooting

Usage Data
- Communication to Stakeholders
- Perennial Access

Problem Fixes

License Tracking
- Invoices
- Vendor Contacts

Trials
- Resource Evaluation

Trials
- Paper Files
- Licenses
- Administrative Site Logins
- "Special" E-Resources

Vendor Contacts
- Price Quotes
- Vendor Contacts

Email
- Communication to Stakeholders
- Perennial Access

Problem Fixes

ER Librarian Brain

E-Resource History (maybe)

Where that sticky-note with the answer is
Why an ERMS?
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

All SHARED in One Place!

- Renewals
- Licenses
- Trials
- Troubleshooting
- Vendor Contacts
- Usage Data
- Communication
- Perennial Access Problem Fixes
- Resource Evaluation
- Admin Logins
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

Hi Shannon,

I was wondering when I could expect this to be in the Db portal, etc.

Thank you,
Andrea

----- Original Message ----- 
From: Shannon Regan <sreagan@gmu.edu>
Date: Friday, September 30, 2011 11:58 am

Subject: Custom Status Alert: "GeoScienceWorld" has changed to "Ready to Process".

Serials Solutions Alert
Alert Name: Ready to Process (Liaison)
Alert Type: Custom

This is an alert to notify you that "GeoScienceWorld" has changed to a status of "Ready to Process".

Access to this resource has been enabled. CDF and TSG staff are working to include this resource in appropriate/applicable discovery tools, such as the catalog, E-journal Finder, Database Portal, and the proxy server (for off-campus access). Please allow 2-3 business days for the resource to appear in these discovery tools. If you have any questions or concerns about this resource, or if this resource has not promptly appeared in appropriate/applicable discovery tools, please contact erms@jhu.edu. Please note: this is an automatic message sent from the ERMS, triggered by a change in status associated with a resource. The email sender is set to be the individual best poised to answer questions about a resource in the associated step of the work flow.

Sincerely,
Andrea

----- End of Forwarded Message -----

This is an alert to notify you that "African American Process" has changed to "Ready to Process".

Access to this resource is now available in admin/stats data and in ERM.
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

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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