Out with the old, in with the new
Revising ERM workflows in a time of change
Who are we?

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What we are talking about today?

context
motivations
guiding principles
goals
what we've done so far
future plans
Our context

• University of Guelph
  • Guelph, Ontario, Canada
  • 29,500 FTE and 1,500 staff and faculty

• University of Guelph Library
  • McLaughlin Library
  • Team-based environment
ERM Team

- Two Electronic Resources & Metadata Librarians, three staff (ERM Library Associates), and student staff
- Manage access and discovery of Library's electronic resources
- Current systems:
  - Voyager (integrated library system)
  - Primo discovery layer
  - SFX link resolver/A-Z E-journal List
  - SpringShare LibGuides A-Z Database List
  - Footprints ticketing system
- TUG – TriUniversity Group of Libraries
motivation
Staffing changes

Photo by Sonny Ravesteijn on Unsplash
Outdated workflows

Photo by Florencia Viadana on Unsplash
unclear responsibilities & communication

Photo by Makarios Tang on Unsplash
guiding principles
• **Techniques for Electronic Resource Management (TERMS)**

• Life cycle of electronic resources and the management of e-resources through this life cycle

• Helped us understand what parts of the life cycle are handled by the ERM Team and how they relate to other parts handled by Acquisitions and Collections

• Great framework for discussions about e-resources workflows for the Collections & Content Strategic Team
NASIG Core Competencies

• NASIG Core Competencies for E-Resources Librarians
• Broad areas of competencies for ERM librarians
• Helped us highlight skills we have and can leverage specific skills to manage the change.

• 1. Communication
• 2. Leadership
• 3. Flexibility
Collections & Content Team Goals

• Team goals help provide guidance on what the ERM team should be prioritizing

• Main priority for ERM team is implementing Alma as part of Collaborative Futures
People don't like change.

For change to be successful, the people impacted by the change need to be a part of it.

You are not just changing systems or workflows, but also people.
What did we take from this?

E-resources work is:

• complex (lots of different systems)

• dependent on many different people (library staff in collections & technical services, consortia partners, vendors, users)

• cyclical, inter-connected and quickly changing both in terms of content, and technical solutions supporting that content

E-resources workflows and staffing models need to correspond to this changing environment and changing needs

• User experience should always be the main guiding principle
What skills helped us redesign our workflows?

- Strong leadership and communication skills
  
  identify the need and communicate with staff throughout the process of change

- Flexibility & adaptability
  
  revise the workflows in iterative process

- Technical skills
  
  implement solutions
goals

1. We wanted to get a good sense of what we were spending our time on as a team

2. We also wanted to set expectations around:
   • how tasks get prioritized
   • how long it approximately takes to accomplish a task
   • how tasks are assigned to staff
   • how we keep track of tasks

3. Create policies and procedures based off these expectations
What have we done so far?
Created an inventory of all ERM work tasks and projects
1. Footprints & a-z database list link checking
   1. Messages directly from users
   2. EZProxy issues

2. Troubleshooting
   1. Off-campus access issues
   2. Broken URLs
      1. Priority if user is directly involved

3. Managing ERM team email
   1. Vendor communication/troubleshooting
   2. Acquisitions information
   3. New/renewed/cancelled products / subscriptions

4. Creating/Updating Access Points
   1. Adding an entry to the a-z database list / Voyager
   2. Fixing an individual link in SFX/Voyager/Database list

5. Collaborative Futures Projects
   1. SFX Link Resolver Clean-Up Project and related tasks
   2. Investigating individual targets/packages and doing clean-up work when necessary

6. Bulk-editing of e-book and streaming media packages
   1. New products take priority over ongoing subscriptions.

7. Projects
   1. License inventory work
   2. Usage statistics
   3. Admin site/vendor/IP address/Logo information clean-up
Changed the way we track and assign tasks
Changed the way we track and assign tasks

• Created a schedule using Outlook calendar for regular tasks
• Scheduled bi-weekly ERM Team meetings
• Cleaned-up the SharePoint task list
• Changed the way bulk editing and loading work is assigned and maintained
Cleaned up and streamlined information

Photo by pan xiaozhen on Unsplash
Cleaned up and streamlined information

• Motivations:
  • Training new staff created a need for organized documentation and information
  • Migration to a new version of SharePoint
  • Preparation for the upcoming migration to Alma

• Created a new central folder for all information
• Removed outdated information and consolidated duplicate information
Created policies and procedures
Future Plans

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What next?

- Consultation & communication with key stakeholders
- Cancellation workflows
Future plans

- Workflow revision & redesign 2.0 - after Alma go live
- Governed by the policies & recommendations of the new consortium
- Informed by our experience working in the previous system and consortium
- Aimed to be sustainable, collaborative, and focus on the user experience
What we learned

• Leadership is needed
• Be flexible
• Communication is key
• Change management is important
Together. We Create!
Questions?

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Citations


• "Shifting Priorities: Preparing to Migrate to Alma/Primo" by Kailey Brisbin, Randy Oldham & Hana Storova, ELUNA 2019 Annual Meeting, May 1, 2019, Atlanta, Georgia.

• Change management ELUNA


• Core Competencies for Electronic Resources Librarians by NASIG Core Competencies Task Force (last revision January 2, 2019)

• TERMS: Techniques for Electronic Resource Management by Jill Emery, Graham Stone, Peter McCracken

• OCUL Collaborative Futures website by Ontario Council of University Libraries.