

ERM & All of Us: Workflows after Re-Organization

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POTOMAC TECHNICAL PROCESSING LIBRARIANS

88th ANNUAL MEETING

October 12, 2012

Overview

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

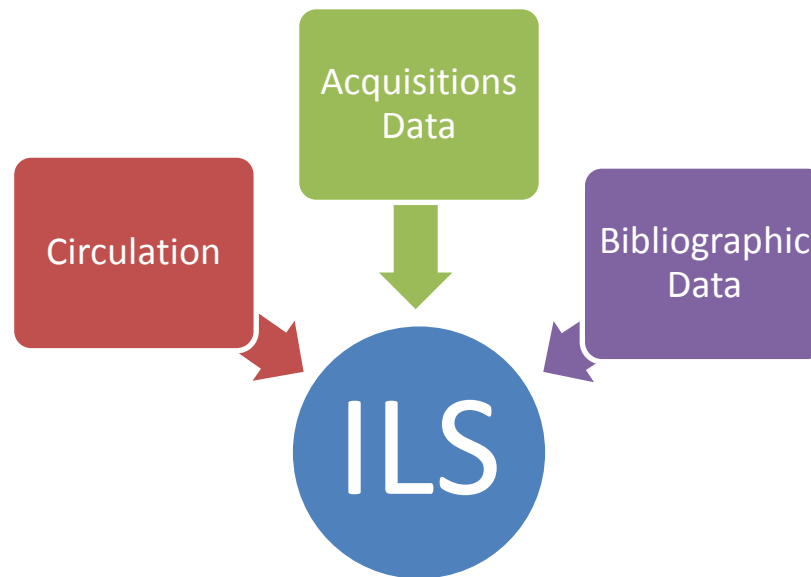
Context

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

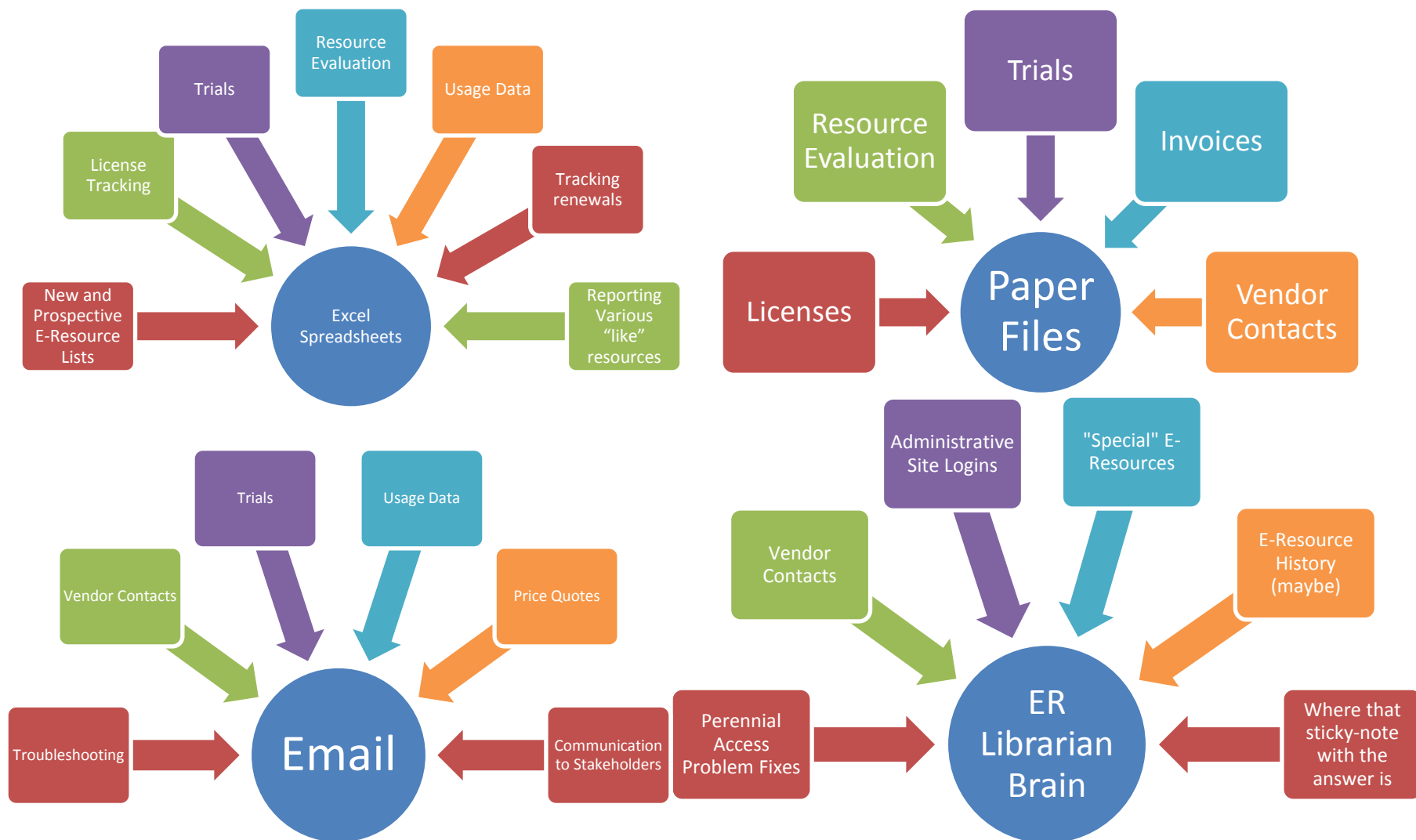
Context

- 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)

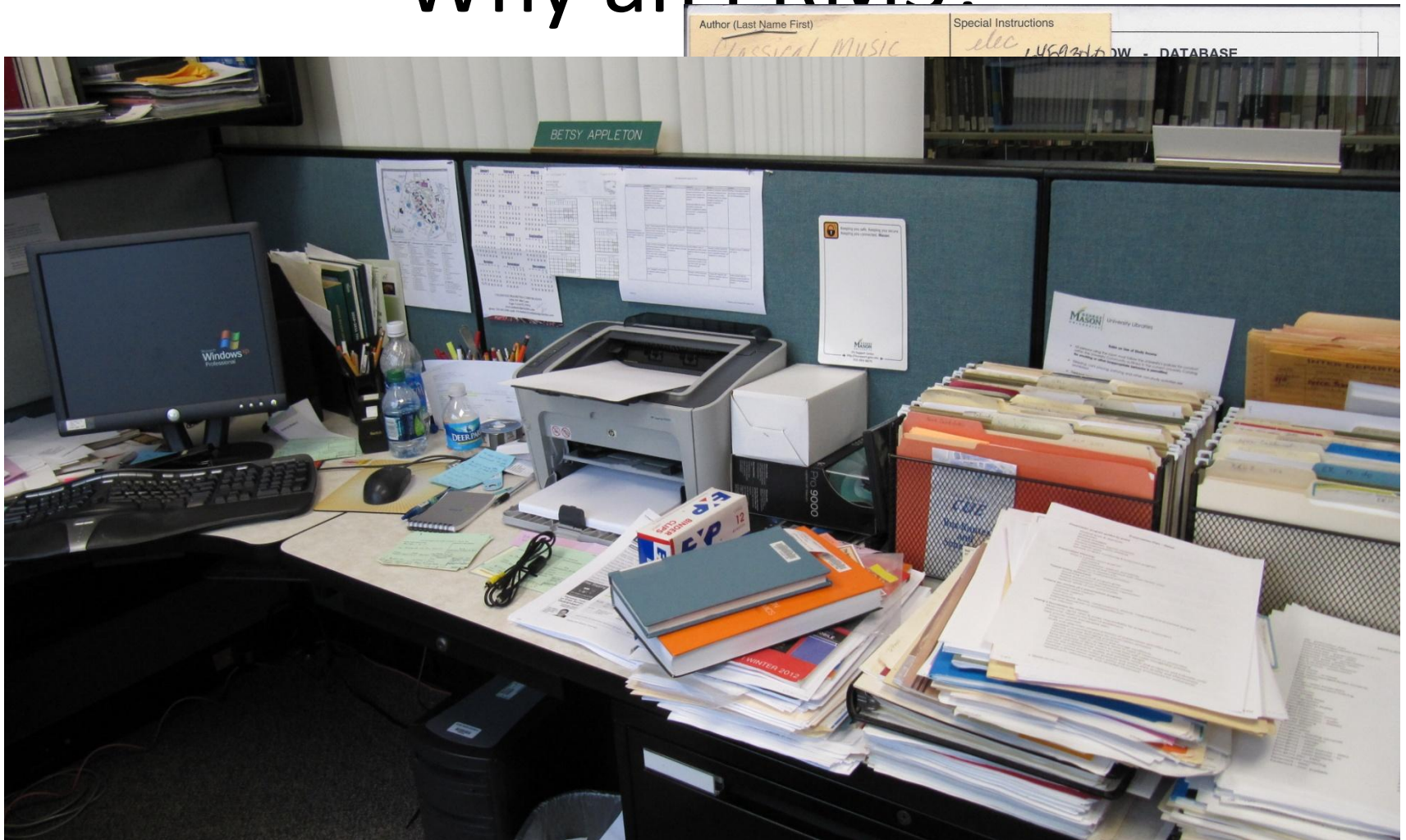
Why an ERMS?



Why an ERMS?



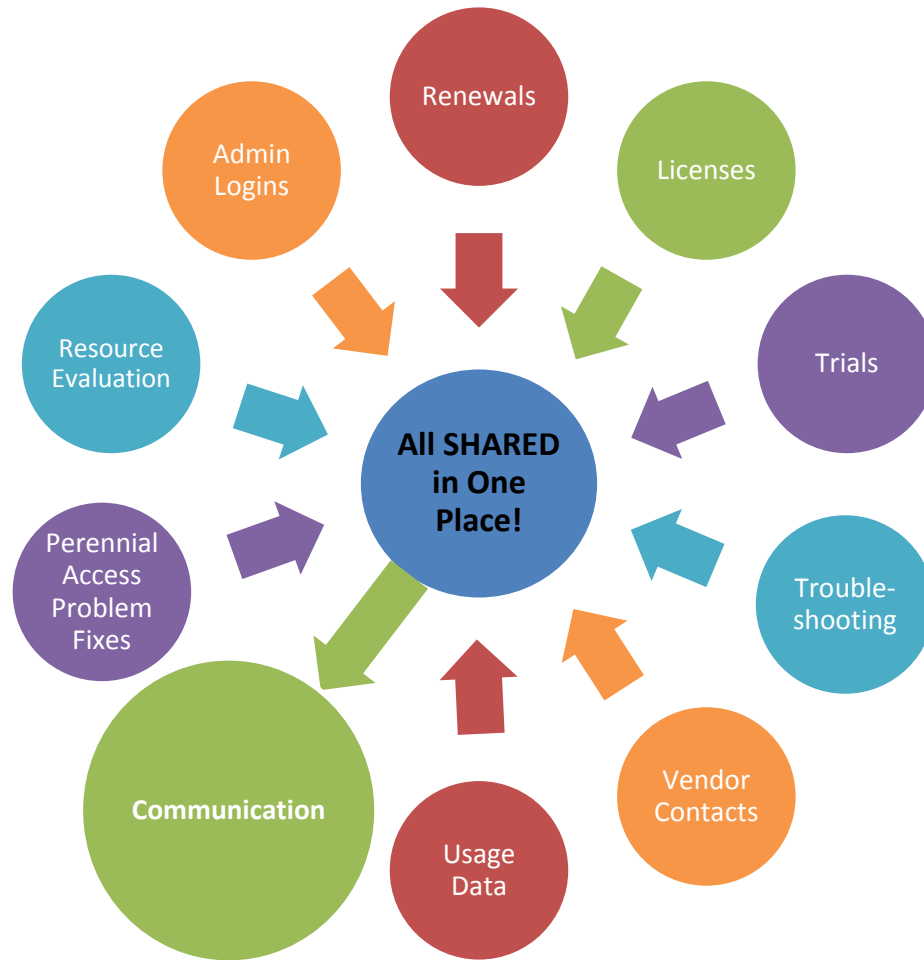
Why an FRMS?



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

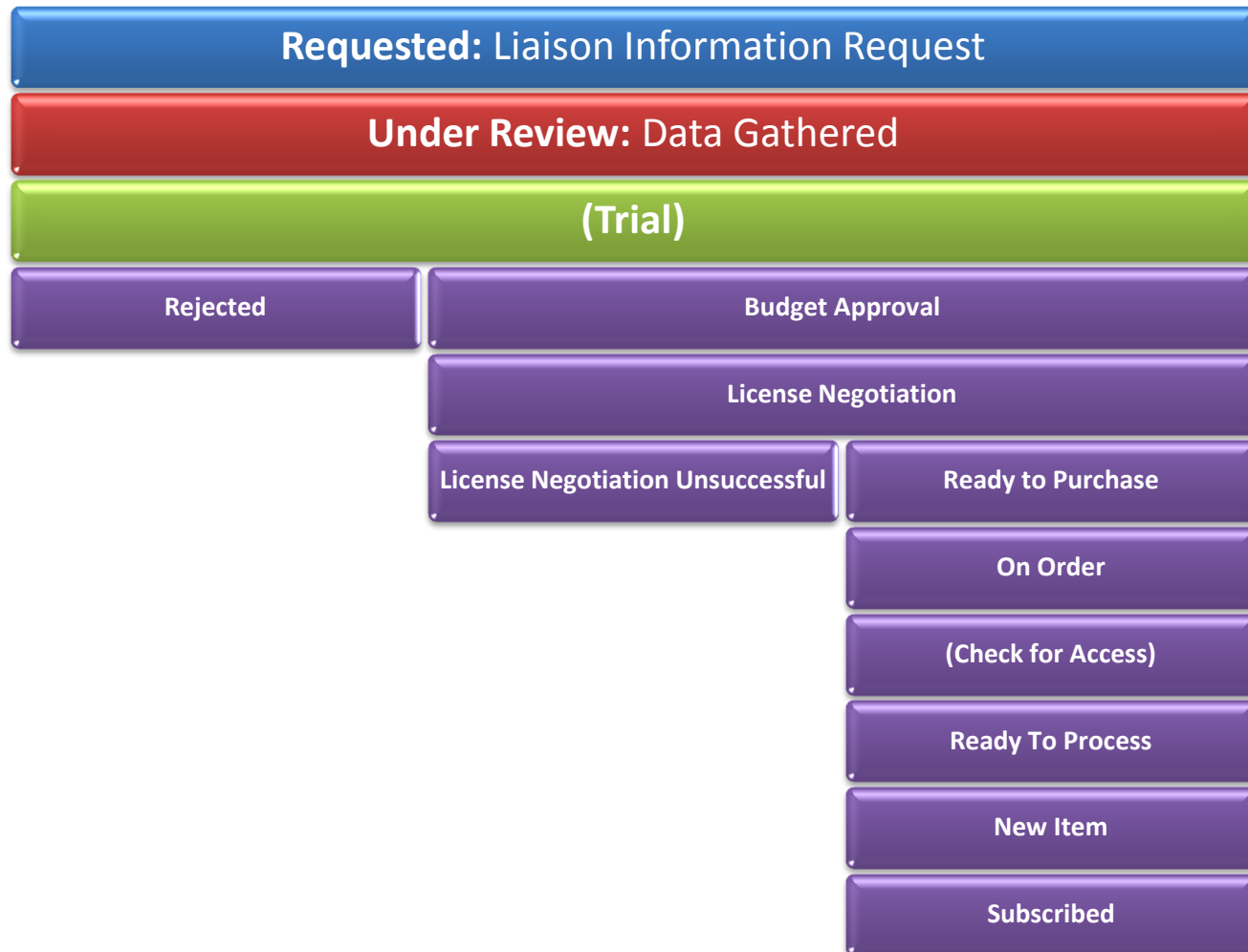
Realistic

- 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



Changes In Work Flow: ERMS

from Betsy Appleton

subject Custom Status Alert: "African American Process".

to sregan@gmu.edu

Serials Solutions Alert

Alert Name: Ready to Process

Alert Type: Custom

This is an alert to notify you that "African American Process" status of "Ready to Process".

Access to this resource is now available in 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 this resource has not promptly appeared in appropriate/applicable discovery tools, please contact eres@furbo.gmu.edu. Please note: this is an automatic message sent from the ERM, 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.

reply

forward

archive

junk

delete

Edit

from Andrea B Baruzzi

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

to Shannon Regan <sregan@gmu.edu>

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 <sregan@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. CDP 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 this resource has not promptly appeared in appropriate/applicable discovery tools, please contact eres@furbo.gmu.edu. Please note: this is an automatic message sent from the ERM, 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.

Alert Type Custom Status

Send alert when any resource changes Ready to Process

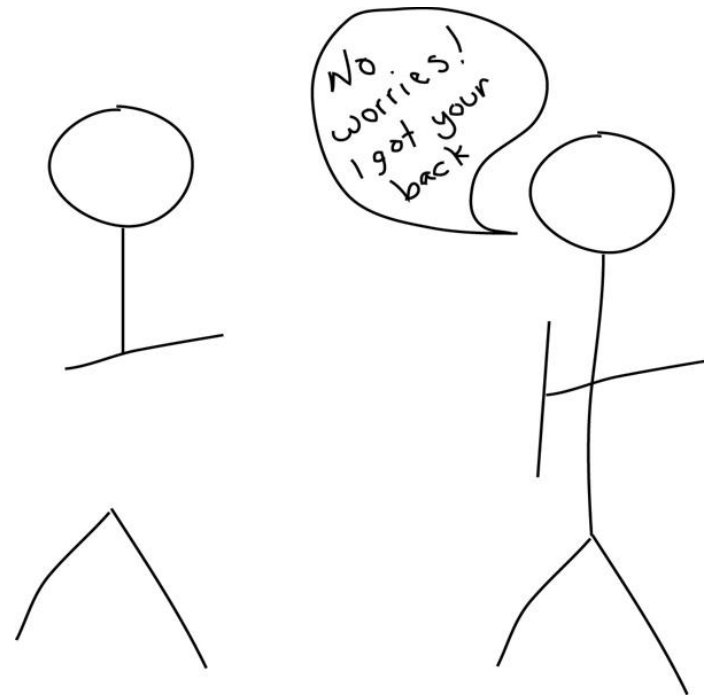
Email Sender Shannon Regan (sregan@gmu.edu)

Email Content Access to this resource has been enabled in 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 this resource has not promptly appeared in appropriate/applicable discovery tools, please contact eres@furbo.gmu.edu. Please note: this is an automatic message sent from the ERM, 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.

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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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