

Welcome to Your New Job

Streamlining Inherited Workflows & Processes



01:

Introduction

UMass - Information
Resource Management

02:

Batch Loading

Why batch loading &
where it was

03:

Unearthing Mysteries

Simplifying Complexity &
Streamlining

04:

Planning for Change

People before Process

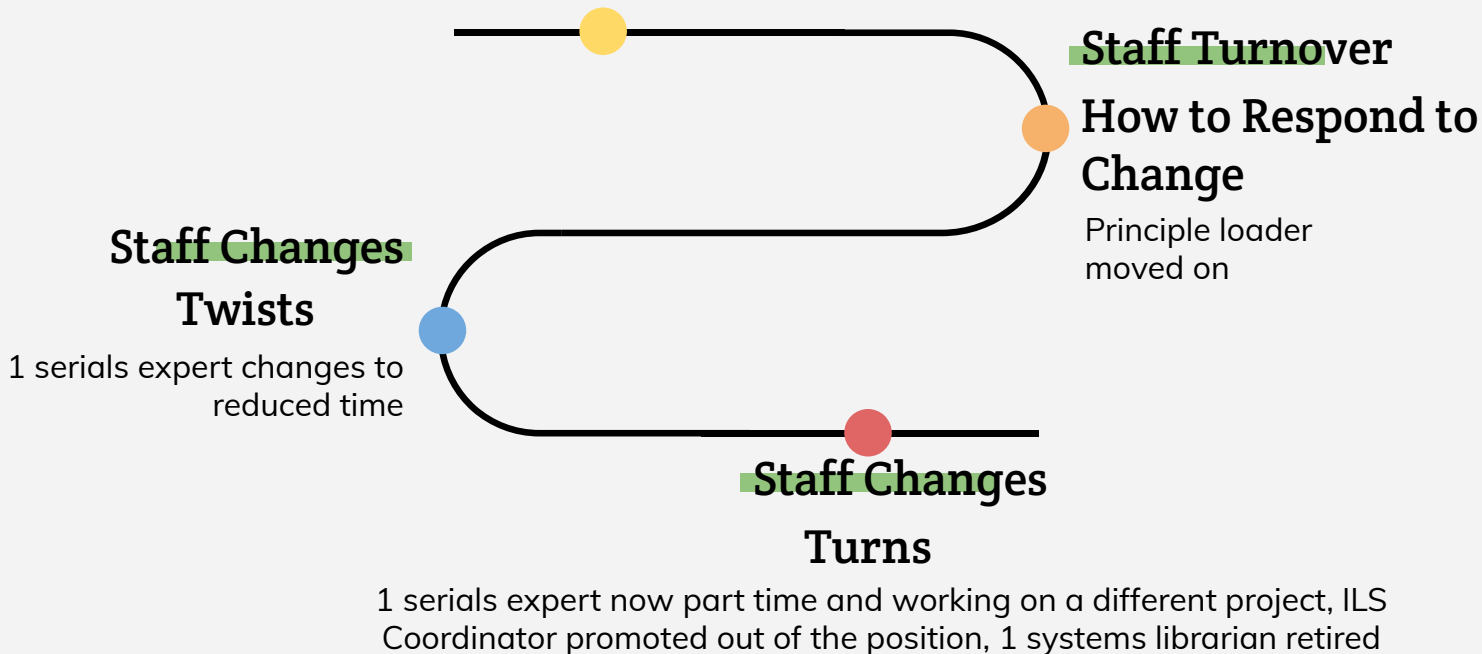


Introduction

UMass & Information Resource Management

Batch Loading Secret Ways of The ILS

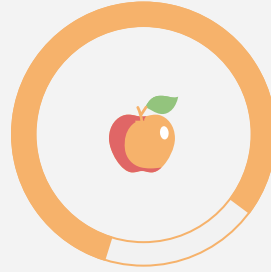
1 principle loader in systems, 1 serials expert, 1 systems librarian, 1 ILS coordinator



What Was Left Behind



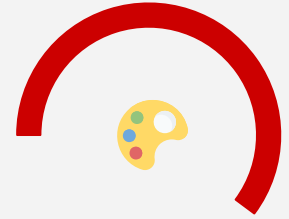
Knowledge



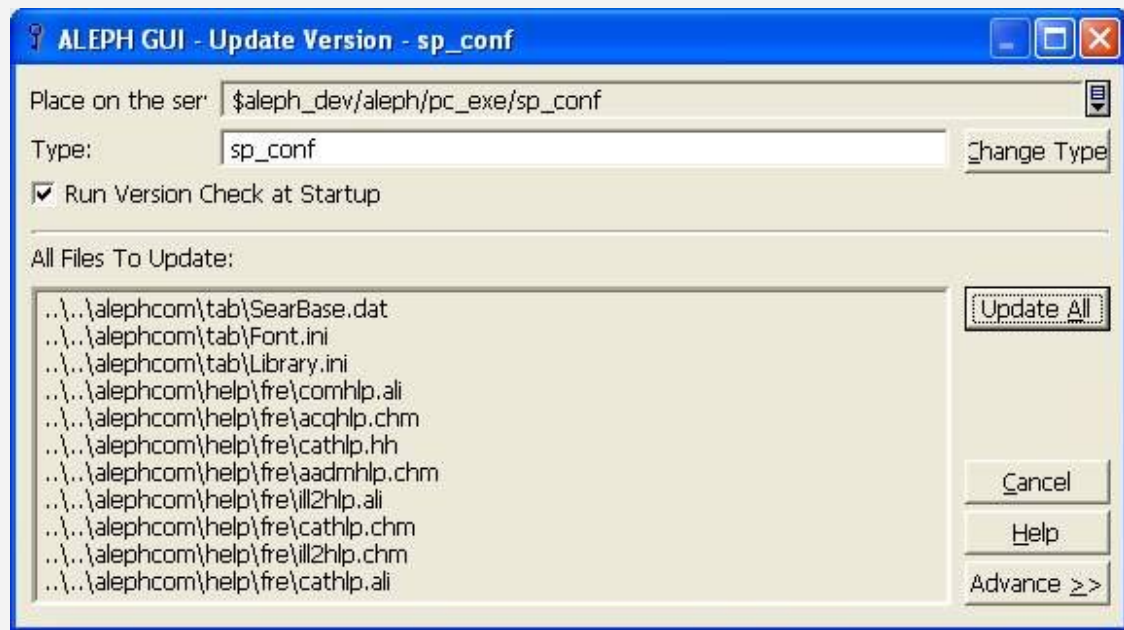
Training



Documentation



Trust

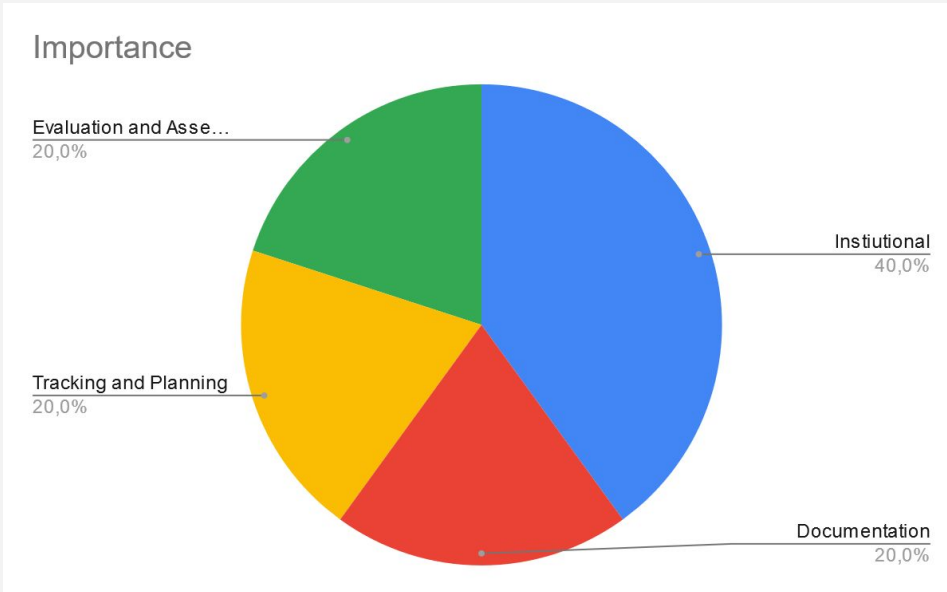


02:

Batch Loading Needs

Why Batch Loading, where it was, where it's going

Batch Loading Needs & Importance of those Needs



Institutional Knowledge

Evaluation & Assessment

Tracking & Planning

Documentation



The Problem with Batch Loading is the extensive need for time, knowledge, resources



A-Z Database List

Workflow was simplified with the hope that less time, knowledge, resources were used

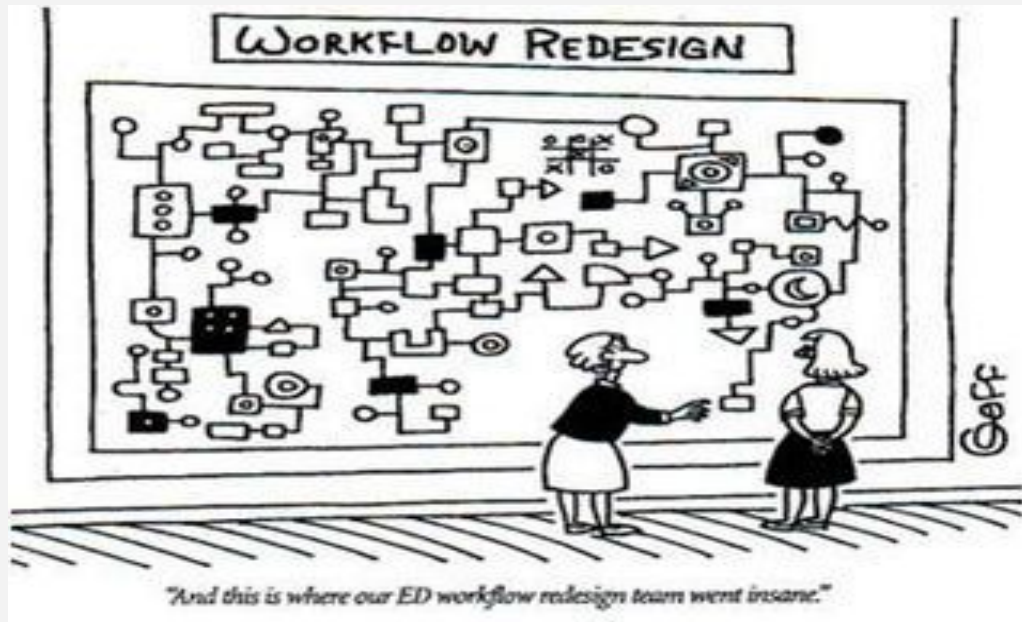
HLM

EDS

CORAL

Ex Libris SFX

Resulting in relying on 3rd Party Linking and EContent Management Software



03:

Unearthing Mysteries

Simplifying Complexity & Streamlining

Questioning the Complex

	People	Workflows & Processes	Needs & Wants
Institutional Knowledge	Find and meet with key stakeholders (Systems librarians, ILS Coordinator, Acquisitions & ERM staff, Liaisons, ...)	Find out the stories. Uncover the lingering questions. What worked. What didn't work.	Capture a list of needs for the Institution and key stakeholders. Start working on wants.
Tracking & Planning	Find and meet those who have been tracking and/or planning	Uncover any workflows or processes.	Which stories correspond to the workflows and processes? Does these correspond to the needs and possible wants?
Documentation	Find anyone who knows about documentation and ask them to share it.	Are there any workflows or processes that incorporate documenting? Learn how documentation was captured and shared (post-it notes, printouts, email, ...)?	Does documentation have a story and how does it relate to other stories? What needs were met with documentation?
Evaluation & Assessment	Find anyone who knows if any evaluation or assessment was done.	Find any possible evaluations.	How does this fit in with the stories being told and the needs of the institution?



People

Key Stakeholders: Users, System Librarian, Discovery & ERM Coordinator, ERM Librarian, Serials Librarian



Workflows & Process

Workflow: "Data Integration"

Process: Deliver eresource content to users that involves the least amount of work and staff



Evaluation & Assessment

One major evaluation in 2014 followed by another in 2016. Became an ongoing assessment of IRM needs.



Institutional Knowledge

Key person: System Librarian



Documentation

Existed a bit everywhere (email, wiki, printouts, word documents, spreadsheets, text files, ...)



Tracking & Planning

Spreadsheets & CORAL (ERM Management System)

Story:

Due to normal staff turnover and changes in how e-resources are managed and delivered, UMass Information Resource Management department simplified workflows so that batch loading is a last resort and where staff rely on 3rd party software. Only a small number of loads were being done but that work was too much for one person.

Needs:

- Deliver quality eresource content to users
- Develop sustainable workflows
- Distribute and rebalance workloads
- Review of workflows/processes that were left in hiatus

Wants:

- Respect the values of UMass Amherst (ethics, Diversity/Inclusion)
 - Aspire to transparent and clear workflows
 - Evaluate batch loads
 - Develop collaborative processes
-

Outcome:

- Create a list of tasks that fit needs & wants
- Prioritize that list
- Create a project plan for list

Evaluation of E-Resources

Creating Lists (aka Report):

- Outlined current and past workflows and staff responsible
- Highlighted issues and needs
- Came up with a set of recommendations

Evaluation of Electronic Resourc...

Introduction

Workflows: General and Meta...

Evaluating Sets of Metadata R...

Comparing Vendor records ...

Evaluating Various Cover Reco...

Introduction

Issues

Need to Revisit E-Resource...

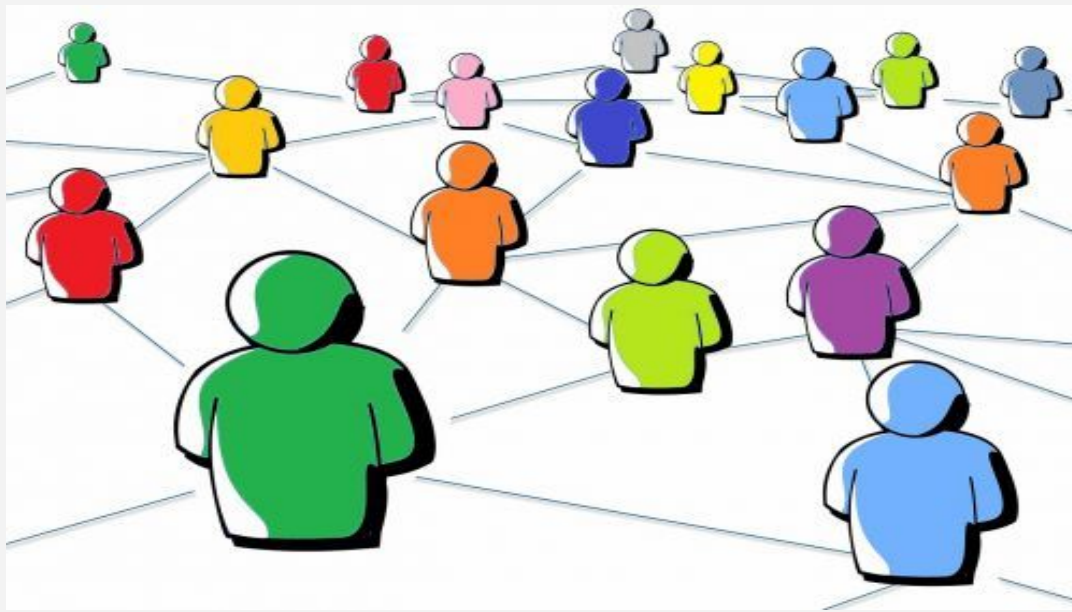
Automating The Process

Recommendations

Coral

Library System (Aleph)

Metadata Librarians



04:

Planning for Change

People over Process



- Training
- Document training
- Launch informal working group (Batch Loading Team)
- Plan for 1st review project (CORAL update)



CORAL Project:

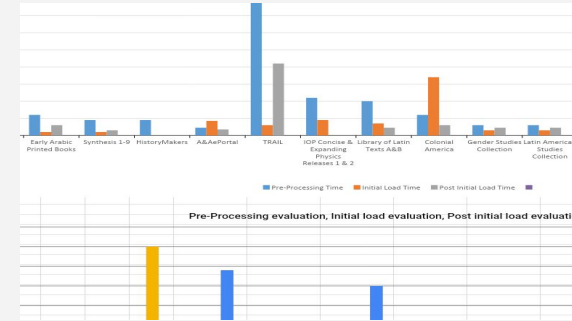
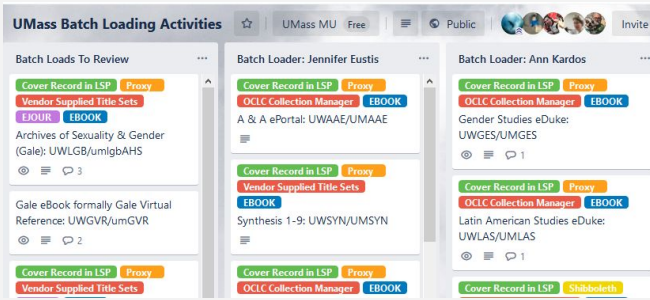
People: BLT, ERM Specialist, Coordinators

Goal: Add fields to “Cataloging” tab to track batch loads better

Task: Come up with list of fields; get that list approved; add fields to CORAL; populate fields

Time: 2-3 months

Evaluate: Led to 2 other CORAL projects (both year projects)



- Information from multiple tracking sources was moved to CORAL and recently to a new Trello board.
- A way to evaluate bibliographic metadata sets was started.
- Documentation is now more transparent. Monthly updates are shared with unit and liaisons.
- Review of past batch loads is almost done. Some of those sets were removed from our ILS while others received updated records.
- An informal working group was established to facilitate coordination and communication.



People

Keep communicating. Re-evaluate the story you heard from different perspectives. What do people feel needs to be changed? Do your proposed changes fit the bill?



Workflows & Process

Workflow: "Data Integration".

Process: Delivery of resource content to users that involves the least amount of work and staff. Are your changes respecting this?



Evaluation & Assessment

What does evaluation mean?



Institutional Knowledge

What is the role of institutional knowledge? How important is it?



Documentation

Where is the best place to document workflows?

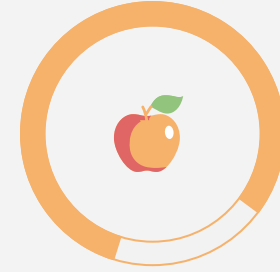


Tracking & Planning

How can this be simplified?



**Work/Life
Balance**



**Project/Daily
Grind Balance**



**Learning/Adopting
/Adapting Balance**



Thanks!

Jennifer Eustis
jeustis@umass.edu
UMass Amherst Libraries

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