Welcome to Your New Job
Streamlining Inherited Workflows & Processes
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

**Staff Changes**

**Twists**

1 serials expert changes to reduced time

**Staff Turnover**

How to Respond to Change

Principle loader moved on

**Staff Changes**

**Turns**

1 serials expert now part time and working on a different project, ILS Coordinator promoted out of the position, 1 systems librarian retired
What Was Left Behind

Knowledge

Training

Documentation

Trust
Batch Loading Needs

Why Batch Loading, where it was, where it’s going
Batch Loading Needs & Importance of those Needs

- Institutional Knowledge: 40.0%
- Evaluation & Assessment: 20.0%
- Tracking & Planning: 20.0%
- Documentation: 20.0%
The Problem with Batch Loading is the extensive need for time, knowledge, resources. Workflow was simplified with the hope that less time, knowledge, resources were used. Resulting in relying on 3rd Party Linking and EContent Management Software.
03: Unearthing Mysteries
Simplifying Complexity & Streamlining

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

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.

Wants:

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

Needs:

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

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
Planning for Change

People over Process
Start with the Easiest Tasks

- 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.
Continue to Simplify

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?

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

Workflows & Process
Workflow: “Data Integration”.
Process: Delivery eresource content to users that involves the least amount of work and staff. Are your changes respecting this?

Documentation
Where is the best place to document workflows?

Evaluation & Assessment
What does evaluation mean?

Tracking & Planning
How can this be simplified?
Remember What's Constant & Prioritize Balance

- Work/Life Balance
- Project/Daily Grind Balance
- Learning/Adopting/Adapting Balance
Thanks!

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