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NASIG Conference Report: Keeping up with the Flow: Electronic Resource Workflow and Analysis

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Alexandra Hamlett, a reference and instruction librarian at Baruch College, was asked to participate in a project to document, analyze, and review the workflows for handling electronic resources in order to make these processes more efficient and identify problem areas. She was asked to spend half of her time on this project. Her status as an outsider to technical services operations meant that she could bring a fresh eye to the process, but also required her to research the subject sufficiently to perform an informed analysis. Among the resources she found particularly helpful were the National Information Standards Organization (NISO), the Digital Library Foundation Electronic Resource Management Initiative (DLF ERMI), scholarly articles, white papers, and case studies. She did not research electronic resource management systems (ERMs) before beginning the project, to avoid being biased by what they were able to offer. The project plan was to conduct interviews with the staff who participate in the process, to record this information, and post it on a wiki page. The wiki also included workflows which were diagrammed using an open source software, Draw.io, with color coding used to identify specific individuals involved in the steps. Hamlett and the head of collection development analyzed the documents separately and then met to go over the findings, looking for overlaps, gaps, inefficiencies, and areas of potential breakdown.

The analysis generated questions for a potential ERMs purchase:

- Can the ERMs keep records of trials, including decisions and feedback?
- Can the ERMs post to the next step in the process?
- Can the ERMs send notification when the invoice is paid, or other time-sensitive steps?
- Is the data on the ERMs records easy to update?

Several functional requirements for an ERMs were identified at this point:

- Workflow management
- Selection and evaluation of trials and orders
- Licensing information
- Acquisition and business information
- Usage data and assessment
- Maintenance issues
- System technical requirements

The desired outcomes for the project were:

- Functional requirements document
- Streamlined workflows
- Constructive discussions
- Iterative assessment
- Improved communication with a staff made more aware of the entire process

Finally, some of the project's other implications for the library were:

- Greater understanding of staff functions
- Staff reorganization
- Platform consolidation
- Integration of usage and cost data
- Assessment of vendor compliance with industry standards