Breaking It Down: Electronic Resource Workflow Documentation

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Breaking It Down: Electronic Resource Workflow Documentation

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Abstract

Managing electronic resources is a fairly complex process faced by librarians with ever more frequency in today's digital environment. In an effort to approach the possibility of purchasing an electronic resource manager (ERM), electronic resource workflow processes were investigated and documented. The life cycle of electronic resources takes a very different form than that of its print counterpart, and it can prove immensely useful to the library to examine these workflows. Such workflow documentation can offer the opportunity for analysis, exposure of problem areas, occurrences of overlap or duplication, and can lead to discussions amongst faculty and staff that are crucial to the smooth running of the institution. This talk will examine the methodology and framework used to document these workflows. It involves interviews with staff and faculty involved in these procedures, discussions with stakeholders at different levels of the electronic workflow, and clarification of the steps involved in these electronic workflows. Once the workflows have been documented, they will undergo analysis. This strategy can expose "gaps" in the procedure, indicate where the workflow can be streamlined, and encourage conversations within the library departments that can lead to new and more effective workflows.

This poster session presents an ongoing project documenting electronic resource workflows at the Newman Library at Baruch College, CUNY in New York City. The library embarked on this project with the purpose of evaluating the benefits of purchasing an electronic resource manager (ERM). After the workflows are documented, they will undergo analysis, which should help the library determine if an ERM will significantly streamline the processes involved in electronic resource management, and increase efficiency by presenting possibilities for staff and departmental reorganization. The methodology for the project was directly informed by the background research conducted, which illuminated the finite processes and work output involved in the lifecycle of different electronic resources. It became apparent after examining various resources that a majority of the libraries involved in similar projects underwent lengthy workflow documentation and analysis to take stock of intricate patterns of workflow that were in operation at their institutions. We performed a number of procedures before beginning the documentation. We consulted best practices and standards from NISO, the DLF ERMI, white papers, scholarly articles, and case studies. We conducted multiple interviews with that helped us accurately document the lifecycle of electronic resources. These interviews involved collection management,

acquisitions, serials, and the usability librarian. The workflows were published on an institutional wiki that will later be available for analysis. We have included images of two workflows created during this project. Figure 1 diagrams the database trial workflow and Figure 2 diagrams the licensing process, below.

The Newman Library anticipates this study will generate the following outcomes: a spec document to evaluate the purchase of an ERM, streamlined workflow, beneficial discussions amongst stakeholders, development of iterative assessment, ability to communicate our institutional needs with vendors, and development of a five-year strategic plan. We foresee that by documenting these workflows, we will get a better understanding of the work involved in managing electronic resources. We intend to analyze our findings as a means of streamlining processes, cut down on task duplication, and increase work efficiency.

There are a number of implications that result from documenting our electronic resource workflows including: a greater understanding of how staff and faculty are involved at different steps of the process, staff reorganization as an outcome of reorganizing workflows, platform consolidation, compliance with industry

standards, access to more effective statistical reports, and the ability to assess our vendors' compliance with industry standards.

Figure 1. Database trial workflow.

Figure 2. Licensing process.