Laying down the whack-a-mole mallet: one inexperienced ERM team’s story....

https://www.youtube.com/watch?v=IMDmOKhWL1Y
Electronic Resources IS Change

• New subscription models
• Platform changes
• Browser updates
• New applications
• Access changes
• New devices
• Authentication changes
• Linking changes
• ...

Western Michigan University
University Libraries IS Change

• New Dean
• New Associate Dean
• New organizational structure
• New strategic plan
• New departments
• New faculty and faculty shifting
• Staff moving to new departments and positions
• New initiatives
• ...

Western Michigan University
2015 Migration

Old Systems

- Locally Hosted ILS
- Locally Hosted Discovery Layer
- Cloud Hosted Discovery Layer/ERM/CKB/Index/Stats
- Cloud Hosted Link Resolver
- *Locally Hosted Authentication*

New Systems

- Cloud Hosted ILS/Knowledgebase/Link Resolver
- Cloud Hosted Discovery Layer/Index
- Cloud Hosted Statistics
- *Locally Hosted Authentication*
Work of the unit

Pre-migration ERM Unit Responsibilities

- **ERM ALL THE THINGS!**
- **Reports of all types for all people**
- **Off campus authentication**
- **User Support of Electronic Resources and Discovery Layer**
  - Link resolver software and monthly updates
  - Synchronize electronic holdings in ERM-ILS-link resolver
  - Manage .mrc files for automated loading/unloading by Systems staff

Post-migration ERM Unit Responsibilities

- **ERM ALL THE THINGS!**
- **Reports of all types for all people**
- **Off campus authentication**
- **User support of Electronic Resources and Discovery Layer**
  - Shared admin of the ILS (Primary admin in ERM Unit)
  - Load P and E bibs via manual/automated processes
  - Sole Admin of Discovery Layer
  - User support / tracking of ILS issues for the department and others
ER Unit Staffing

Old ERM Unit Staff

- 4 full time team members
- ~80 years combined experience
- 2 “Techies”
- ~40 years “technical” experience

New ERM Unit Staff

- 3.5 full time team members
- ~50 years combined experience
- 1 “Techie”
- ~6 years “technical” experience
Geri’s Old File Cabinet

To Do:
- Licensing
- ER Policies
- A-Z Inclusion Criteria (WJ) Home
- ISODE
- ONIX
- ER Unit Workflow

Doing Analytics, Funds
- EBSCO
- CIO
- Stats Research
- WMU-WMed Shared (Renewal)
- Accessible Arch (EDL)
- OpenURL
- Usage Stats
- Backstage
- Marive Leads

Post Update Reactivations
- Color Atlas of Pharmacology
- "" Pathopsychology
- "" Occupational Psychology
- American Art and Architecture
- "" Embryology and Neuronal Development

Migrations
- 19th Century Masterfile
- Oxford Biographies/Music/Art
Geri’s New File Cabinet
Kanban
Task List
Dashboard

Alma Configurations
This project helps us keep track of the administrative work we need to do in Alma and the projects we work on for other units and departments in the library.

Primo
This project helps us keep track of requests, customizations and tweaks to the Primo BO. It's a never-ending project...

Michelle's Routines and ...
This project is where Michelle Wise keeps track of all her routine and non-routine tasks. There is no end date.

Paul
This is where Paul keeps track of all his stuff. There is no end date.

Emily's To Do's
This project contains all the non-routine tasks assigned to Emily Gross.

Emily's Routines
This project is where Emily Gross tracks all her "routine" tasks. There is no end date for this project.

Geraldine
This project contains all the ERM tasks assigned to Geri Pinna. There is no end date on this project.

Usage Statistics July 2017
This project is complete! Hurrah! Great job ERM Team!

Electronic Resources
This project is helping Geri keep track of the decisions made by the Collection Development Committee, Library Liaisons and the Associate Dean about resources paid out of the old 4971 fund. The end date of this project is December 31, 2017.
Investigate ways to update shelf-list to 21st century

MARCIVE documentation

Government Documents Item Policies/Location List

Team Responsibilities

Flowchart

Delete Old Import Profiles from Production and Sandbox

Setup Acquisitions Vendor and Fund information for MARCIVE (Sandbox)

Re-do new monograph import profile to create inventory and not overlay brief records

Removing Gov. Docs Circulation desk

Determine why 8 records did not overlay the brief shipping list

End new Physical Monographs

Frequently misspelled words in bib records
Discovery Layer Configuration
Statistics

Pre-Migration Statistics Workflow

- Keep login credentials up to date in ERM
- ERM vendor collects ALL usage statistics
- Configure/monitor SUSHI harvesting (40+)
- Collect problematic COUNTER stats
- Archive usage statistics

Post-Migration Statistics Workflow

- Keep login credentials up to date in ILS and a separate spreadsheet used for collecting statistics
- COLLECT ALL THE STATISTICS!
- Monitor SUSHI harvesting (~25)
- Request SUSHI account creation (took a long time)
- Upload ONLY JR1 (BRs too, if we want to “trick” the system)
- Archive usage statistics
# Statistics the new way

<table>
<thead>
<tr>
<th>Interface Name</th>
<th>Vendor</th>
<th>Vendor Name</th>
<th>Folder</th>
<th>URL Link</th>
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<td>EBRS</td>
<td>LEONARDO MEMBER OF LI</td>
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<td>Email <a href="mailto:matthew.wilson@wmich.edu">matthew.wilson@wmich.edu</a></td>
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<td>G/Depart AIP Subscription (American Institute of Physics)</td>
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<td>Email <a href="mailto:jwilson@wmich.edu">jwilson@wmich.edu</a></td>
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</table>
Statistics the new new way
Statistics the new new new way

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<th>Task</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early English Books Online</td>
<td>Mar 3, 2018</td>
</tr>
<tr>
<td>19th Century Masterfile and Reference Universe</td>
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<td>ABC-CLIO</td>
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<td>Accessible Archives</td>
<td>Mar 3, 2018</td>
</tr>
<tr>
<td>ACM Digital Library</td>
<td>Computing Reviews- always behind</td>
</tr>
</tbody>
</table>

- E = Email them for statistics. *E = Emailed Statistics ...
Statistics the new new new... you get the idea
Results of our work:

• Three new people trained to manage usage statistics
• ERM team learned how to use an agile management tool
• Completed our first collaborative project
• Three new workflow gurus
• Five person-hours saved gathering usage statistics
• I didn’t have to do any of the work
• We learned a lot about project management
What’s next for statistics?

https://gifsoup.com/gifs/detail/sleepyfemaleborer
Other Kanban projects

- OpenURL button/Library Logo update (August)
- Screen Reader testing (November)
- Personal project board for all team members to track their own work (Ongoing)
- Discovery Layer Configuration Project (Ongoing)
- ILS Configuration Project (Ongoing)
- Reports Management Project (Ongoing)
- WMU-Wmed Shared Collections Project (Ongoing)
- MARCIVE/GovDocs Project (Stalled)
- PO Re-Linking Project (January 2018)
- ERM Lifecycle project (Investigation/Analysis)
- ERM Assessment project (Investigation/Analysis)
What's Next for WMU ERM?

http://www.laughinggif.com/gifs/ey0ynqnot
**ERM Lifecycle Project**

**State and Local Stats (Sage)**

- **Priority**: Medium
- **Subscription Period**: January 1-December 31
- **Who do we pay?**: Sage
- **Last Day to Decline**: December 1
- **Where to Renew**: email
- **Reporting Code**: Political Science
- **Liaison**: Maria
- **Last day to renew**: December 15

**Description**

- Get and attach usage/Check SUSHI
- Get and attach usage/Check SUSHI
- Update Description for A-Z
- Calculate CPU

**Followers**

Write a comment...
Principles of the Agile Manifesto (Paraphrased for ERM)

- Customer satisfaction is the highest priority.
- Welcome changes, even late in the game.
- Deliver working [electronic resources]
- Work together daily throughout the project.
- Build projects around motivated individuals. Give the team what they need and trust them to get the job done.
- Face to face team communication is best.
- Working [electronic resources and customer satisfaction] is the primary measure of progress
- Agile processes promote sustainable development. Everyone involved should be able to maintain a constant pace indefinitely.
- Continuous attention to technical excellence and good design enhances agility.
- Simplicity--the art of maximizing the amount of work not done--is essential.
- The best architectures, requirements, and designs emerge from self-organizing teams.
- At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

http://agilemanifesto.org/principles.html
Mapping agile principles to other standards

• **Agile Manifesto Principle**: At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly (http://agilemanifesto.org/principles.html).

• **ACRL Management/Administration Principles: Standard 7.8**: Library personnel model a culture of continuous improvement. (http://www.ala.org/acrl/standards/standardslibraries)

• **NASIG Core Competencies of ERL 3.6**: Is able to identify the principles and techniques necessary to identify and analyze emerging technologies and innovations in order to recognize and implement relevant technological improvements. (http://www.nasig.org/site_page.cfmpk_association_webpage_menu=310&pk_webpage=7802)

• **Library Strategic Plan Objective 1.C**: Develop a library-wide philosophy and definition of customer service and empower all employees to create a culture of great service and continuous improvement (http://wmich.edu/library/about/strategicplan)
Thanks for listening!

https://giphy.com/gifs/cute-duck-awww-jgIDKTrvTssDK
References

http://agilemanifesto.org/

http://www.ala.org/acrl/standards/standardslibraries


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