

GO TEAM!

Using Teams to Manage Electronic Resources

The increasing prevalence of electronic journals in library collections has impacted many aspects of library operations. Libraries have had to rethink workflows, processes, staffing needs, and other factors to account for the differences between print and online journals. The management of electronic journals can often cross departmental boundaries and bring into question current workflow. To address the changing landscape of electronic journal management, the University at Albany Libraries developed two teams: one to implement batchloading electronic journal records and a second to address ongoing management and related policies. As a result of using a team approach for these responsibilities, the University Libraries was able to streamline processes, reduce duplication of effort across departments, coordinate policies and procedures, improve communication, and develop best practices.



UNIVERSITY LIBRARIES
UNIVERSITY AT ALBANY
State University of New York

360 MARC Implementation Team

This team was charged with transitioning from a manual process for maintaining electronic journal access to batchloading electronic journal bibliographic records. This team was responsible for creating a record profile with our vendor, developing an implementation timeline, testing the process, and performing the initial batchloads in the production side of our ILS.

360 MARC Records Implementation Team

Charge:

To implement the 360 MARC Records Service offered by Serials Solutions. The Group reports to the AD for Technical Services and Library Systems. Tasks will include:

- Review Serials Solutions 360 MARC record service documentation
- Make recommendations regarding direct or hosted links (consult with OPIC and others as appropriate)
- Make recommendations regarding frequency of batchloading and whether we delete and reload the whole file monthly, or whether we only load adds, changes, deletes
- Design a workflow that minimizes record manipulation and maintenance
- Test suppression of e-journal holdings in ALEPH
- Set up and test ALEPH configuration for batchloading 360 MARC records on Test ALEPH
- Set up ALEPH configuration for batchloading on PROD ALEPH
- Confirm successful load in Production ALEPH
- Document local configuration and policy decisions
- Document monthly procedures for handling errors
- Consult with other groups and individuals as appropriate
- Provide weekly reports on progress

Members

- Head, Catalog Management Services
- Senior Programmer Analyst
- Catalog Management Librarian
- Head, Cataloging Services
- Serials Cataloger
- Head, Library Systems

Electronic Resources Management Team

This team was charged with coordinating the management of electronic resources, documenting and assessing workflows, and making recommendations for improving electronic resource management. And to ensure that policies, practices, and decisions are made in a consistent manner.

Electronic Resources Management Team

Appointment date: September 10, 2014

Charge:

The purpose of the new Electronic Resources Management Team (ERMT) is to bring together individuals who work with the management of licensed, purchased, and free electronic resources (serial and monographic) in the University at Albany Libraries. The focus will be to identify and implement ways to continually improve and enhance user access to all our e-resources. The team is charged with examining the different pieces of electronic resource management and then to work collaboratively to provide a comprehensive plan for dealing with the "back-end" work regarding e-resources, including the acquisition, licensing, cataloging, creating and maintaining the systems and databases to manage the data and knowledge bases concerned with these technical activities, and the integration of electronic resource management and the dissemination of e-content through various search mechanisms.

The Team reports to the AD for Technical Services and Library Systems. Its work is carried out in consultation with other library groups as appropriate. Membership will be renewed annually.

Tasks will include:

- To plan and coordinate the management of electronic resources at Albany Libraries.
- To provide oversight of 360 Link Resolver and MARC Records Services offered by ProQuest (formerly Serials Solutions).
- Assess current workflows for individual e-journal and e-book subscriptions, including the acquisition, cataloging, and ongoing maintenance.
- Investigate and make recommendations regarding the use of an electronic resource management system (ERMS).
- Make recommendations for workflows that minimize record manipulation and maintenance.
- Monitor Proquest tickets for electronic resources, document process for resolving problems.
- Document local workflows, ALEPH configurations, and policy decisions.
- Document monthly procedures for handling errors.
- Consult with other groups and individuals as appropriate.
- Maintain meeting summaries and share with Associate Director for Technical Services and Library Systems.

Members:

- Head, Catalog Management Services
- Catalog Management Librarian
- Head, Reference Services
- Electronic Resources Coordinator
- Coordinator of Interlibrary Loan
- Senior Programmer Analyst
- Subject Librarian for Business & Economics
- Head, Cataloging Services
- Monographs Coordinator

Electronic Resources Management Team

Chair

Job Description

(Total average time commitment: 2-4 hours per week)

1. Actively follow trends and developments in electronic resource management in academic libraries.
2. Using the Team charge and tasks as a guide, set goals and target dates for the Team.
3. Appoint and monitor the progress of sub-groups as necessary to complete the work of the Team.
4. Communicate with and seek input from others throughout the Libraries as necessary or appropriate.
5. Work with Team members to achieve consensus regarding the management of electronic resources.
6. Draft agendas and lead Team meetings.
7. Ensure that decisions and actions taken by the Team are documented in the minutes.
8. Distribute minutes to the Team and post on library.
9. Manage the Team's web page (this responsibility may be shared with other Team members as feasible).
10. Review Team membership annually.

Electronic Resources Management Team

Member

Job Description

(Total average time commitment: one hour per week)

1. Actively follow trends and developments in electronic resource management in academic libraries.
2. Using the Team charge and tasks as a guide, work with other Team members to carry out goals.
3. Represent your unit's interests and concerns in Team discussions and plans.
4. Seek feedback from your unit on any issues that might affect their work.
5. Make recommendations regarding the management of electronic resources.
6. Attend regularly-scheduled Team meetings.
7. Assist with taking minutes on a rotating basis.
8. Serve on sub-groups as assigned.

Benefits

- Smooth transition when changing processes
- Leverage the expertise and experience of each of the members/departments
- Open lines of communication and increase awareness of the entire workflow throughout Technical Services
- Increased profile of the work of Technical Services and Library Systems outside of the division

Challenges

- Large learning curve for some members
- More deliberative, slower process
- Sometimes difficult to reach consensus
- Difficulty finding times to schedule meeting times that worked for everyone

Lessons

- Need for good communication
- Open sharing of information speeds problem resolution
- A project management tool would help to keep everyone on the same page
- Team composition is a key component for success
- It's important to deal with data clean-up as soon as possible to avoid legacy data issues later on

Rebecca Nous, Catalog Management Librarian & Wendy West, Head of Catalog Management Services