A Year With Verde: Implementing An ERMS From Start To Full Use

Andrew Waller
Helen Clarke
Collections Services,
Libraries & Cultural Resources,
University of Calgary
What We’ve Going To Cover

- Background to the project
- Implementation
- Where are we at present?
- Staffing and the ERMS
- Future developments
- What have we learned?
- Questions, discussion
Background to the Project

- Converging issues
  - Collection growth
  - Consortial environment
  - Growth of electronic products
  - Decline of print
  - Fewer staff
  - Increase in complexity
  - Scattered information

- Arrival of DLF standards and ERMS products
Hit by a Bus or Game of Whisper?

Hit by a Bus
- No backup
- Entrenched
- Burnout
- No succession

Game of Whisper
- Lose big picture
- Information loss / corruption
- Constant turnover
- Reduced control / flexibility
Implementation

- Started mid-2007
- Workflow analysis
- On site instruction, webinars, weekly meetings
- Server set up at The Alberta Library
- Began entering new orders at the start of the new fiscal year (2008/2009)
Where Are We At Present?

- Still doing new orders
- Are dealing with renewals of e-products for 2009
- Not using the workflows function but Verde is still serving as a workflow record and info repository
- Not being used as a collection analysis tool yet
- Need to complete license info and enter print + online resources
- Still learning, still trying things out
Staffing And The ERMS

- We knew Verde would affect processes
- Workflow analysis following by creation of centralized, specialized ERM unit in Collections Services
- Movement of staff and duties to this unit, from other related units
- Has resulted in changes to what others do
- Part of larger change in tech services to focus support on digital resources
Staffing And The ERMS - Questions

- What is the current workflow?
- What will staff stop doing?
- How will job descriptions and classifications change?
- Who are you counting on, will they deliver?
- How will you stage implementation?
Future Developments

- There is more to enter into Verde
- The Sync!
- There is more consortial work to do
- There is more to do in terms of connecting to our ILS and financial systems
- More people in the electronic resources unit
- Rolling Verde out to the rest of the Library
What Have We Learned?

- An ERMS changes your processes
- Support from Administration is necessary
- Get on with it!
Questions? Discussion?
Andrew’s Info

Andrew Waller
Serials Librarian
Libraries and Cultural Resources
University of Calgary
waller@ucalgary.ca
(403) 220-8133 voice
(403) 284-2109 fax
Helen’s Info

Helen Clarke
Head, Collections Services and Electronic Resources Librarian
Libraries and Cultural Resources
University of Calgary
hclarke@ucalgary.ca
(403) 220-3796 voice
(403) 284-2109 fax