



# Flowcharting Alma e-resource acquisitions processes

Presentation by Anna Wheeler, Manager Resources,  
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On 24 May 2017 @ Monash University



# Why did we flowchart our processes?

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## **Reason 1: Alma Project Benefits Realisation**

Alma implementation - December 2014



Alma promised improved management of e-resources



Alma not a magic bullet !



To get benefits we needed to look at processes



# Why did we flowchart our processes?

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## Reason 2: People

Library staffing restructured December 2014 - New roles:

- Knowledge Specialists
- Resource Specialists

New staff questioning how we always do things

Processes not understood, not transparent, not agreed, no buy-in, roles not clear (who does what), important steps not being done



Process improvement project – late 2015 to mid 2016



# Planning

Consulted with Business Analyst

Agreed process improvement steps:

1. Map current process
2. Analyse process:
  - Concerns, challenges, issues
  - Opportunities
  - Agree importance of each issue
3. Address most important concerns / opportunities
4. Agree new improved process end to end



## Getting started

- **Formed project group:**
  - Knowledge Specialists (subject librarians)
  - Resources Specialists (acquisitions/e-resources/systems)
  - Business Improvement Analyst
- Arranged process workshops to work through the steps



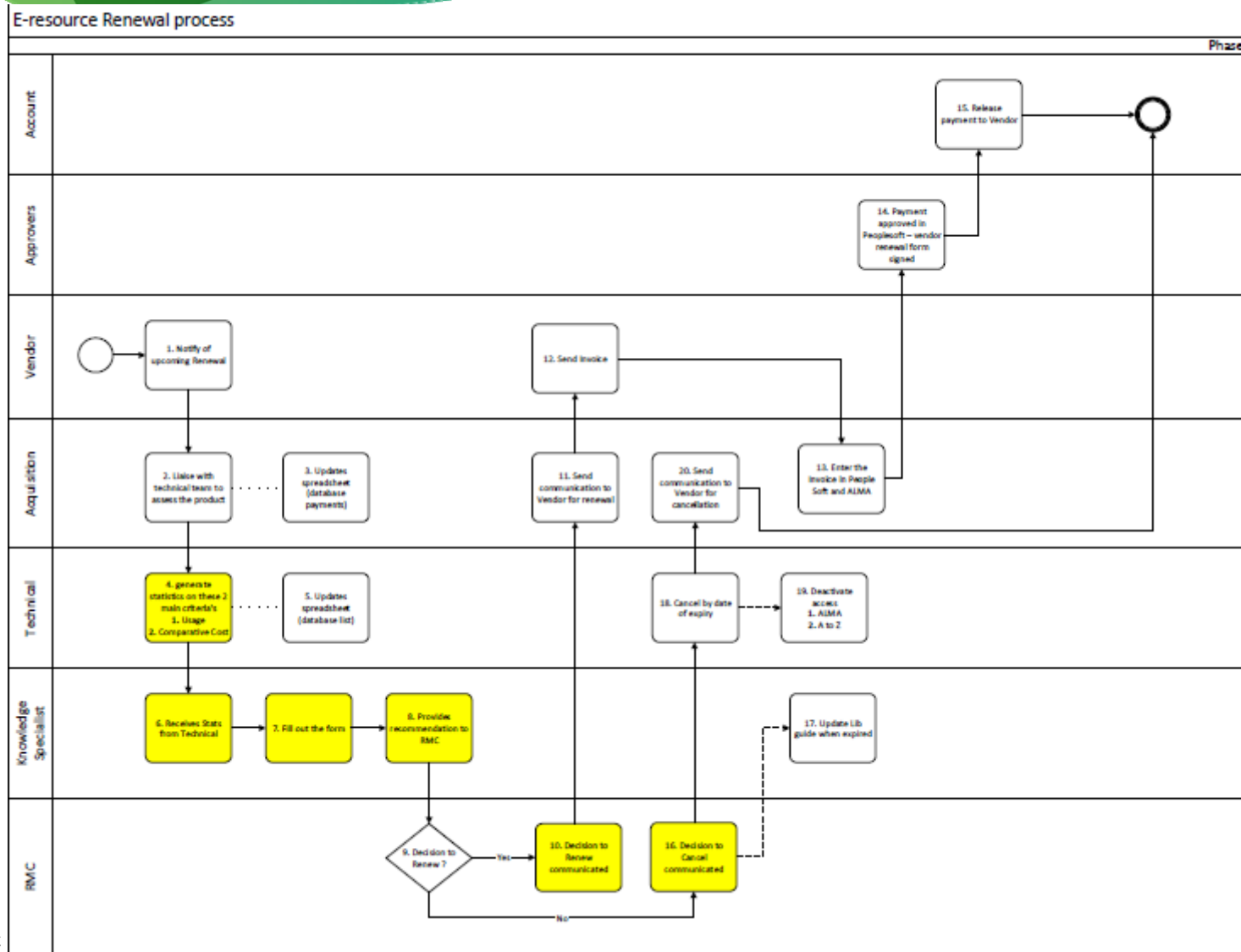
## Step 1: Agree 'as is'

- Mapped the current 'as-is' processes for:
  - E-Resource Trial
  - E-Resource Acquisition
  - E-Resource Renewal / Cancellation

Started about October 2015 – Finished February 2016!



# Example of mapped 'as is' process





# Example of existing 'as in' form

**RESOURCE\_REQUEST**  
All fields are mandatory, missing information will delay applications  
DO NOT SAVE INFORMATION IN THIS TEMPLATE

DATE	DETAILS		
SELECT ONE	Reason	Reason	Time
Knowledge Specialist			
<b>RESOURCE NAME</b>			
Vendor details			
Date renewal required by:			
Subscription coverage dates			
Subject area/s			
Current year subscription cost	<u>Update (as USD)</u>	<u>UNDS</u>	
Renewal subscription proposed cost	<u>Update (as USD)</u>	<u>UNDS</u>	
Increase current compared with previous in \$	<u>Update (as USD)</u>	<u>UNDS</u>	
% increase current compared with previous			

STATISTICS						
Insert stats here						
	Year	UNDS	Sessions	CPS	Playbacks	CP play
Usage analysis for ROI (eg cost per search)						

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**RESOURCE\_REQUEST**  
All fields are mandatory, missing information will delay applications  
DO NOT SAVE INFORMATION IN THIS TEMPLATE

LIAISON LIBRARIANS MUST COMPLETE THIS SECTION FOR ALL RESOURCE			
Liaison Librarian comments:			
Differences between versions			
Journals included			
Full text journals			
Full text books/monographs			
What other resources are available on this topic:			
Liaison librarian recommendation: eg			
Departmental/teaching staff comments			

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**RESOURCE\_REQUEST**  
All fields are mandatory, missing information will delay applications  
DO NOT SAVE INFORMATION IN THIS TEMPLATE

RESOURCE MANAGEMENT COMMITTEE	
RMC members notified	Date
Tabled at Resource Management Committee:	Date
Comments	
Action to be taken	Renewal/ Approved

Vendor information	
Vendor notified: Yes/No	Comments:
Date:	
LICENCE:	
Signed:	
Payment method:	
PeopleSoft Purchase order number:	
Yix:	
Library Director sign-off:	
Date:	

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## Step 2: Analyse process - brainstorm

Post-it !





# Example: Concerns and opportunities

No	Process	Priority	Concern/ Opportunity	Description
46	e-resource- Renewal		Concern	Step 5 (update database list) not needed, possible duplication. User can use Alma rather than spreadsheet.
47	e-resource- Renewal		Concern	Knowledge specialist should be able to retrieve usage anytime. Step 4 (Generate Stats.) 1. Should be with Knowledge Specialist (Usage) and second part 2. (Comparative Cost) should be with Acquisition.
48	e-resource- Renewal		Concern	Is there a cancellation clause in renewal notice?
49	e-resource- Renewal		Concern	What happens when Knowledge Specialist says yes, but budget says no.?
50	e-resource- Renewal		Concern	What about huge packages - eg. Ebsco Megafire?
51	e-resource- Renewal		Concern	Ensure that everything is communicated to all the people who need to know during renewal
52	e-resource- Renewal		Concern	Department/ Academic staff being asked about renewals without Knowledge specialist knowing
53	e-resource- Renewal		Opportunity	Change/ Simplify the form Use ALMA instead of form Paste stakeholders feedback in ALMA Renewal form cannot be same as acquisition form
54	e-resource- Renewal		Opportunity	Work towards recording the steps in an application and not spreadsheet
55	e-resource- Renewal		Opportunity	Knowledge Specialist need advanced warning of upcoming renewals e.g. Christmas. Give sufficient time to consider renewals- sometimes short notification now. (at least 2-3 months advance notice)
				Instead of form use spreadsheet to record



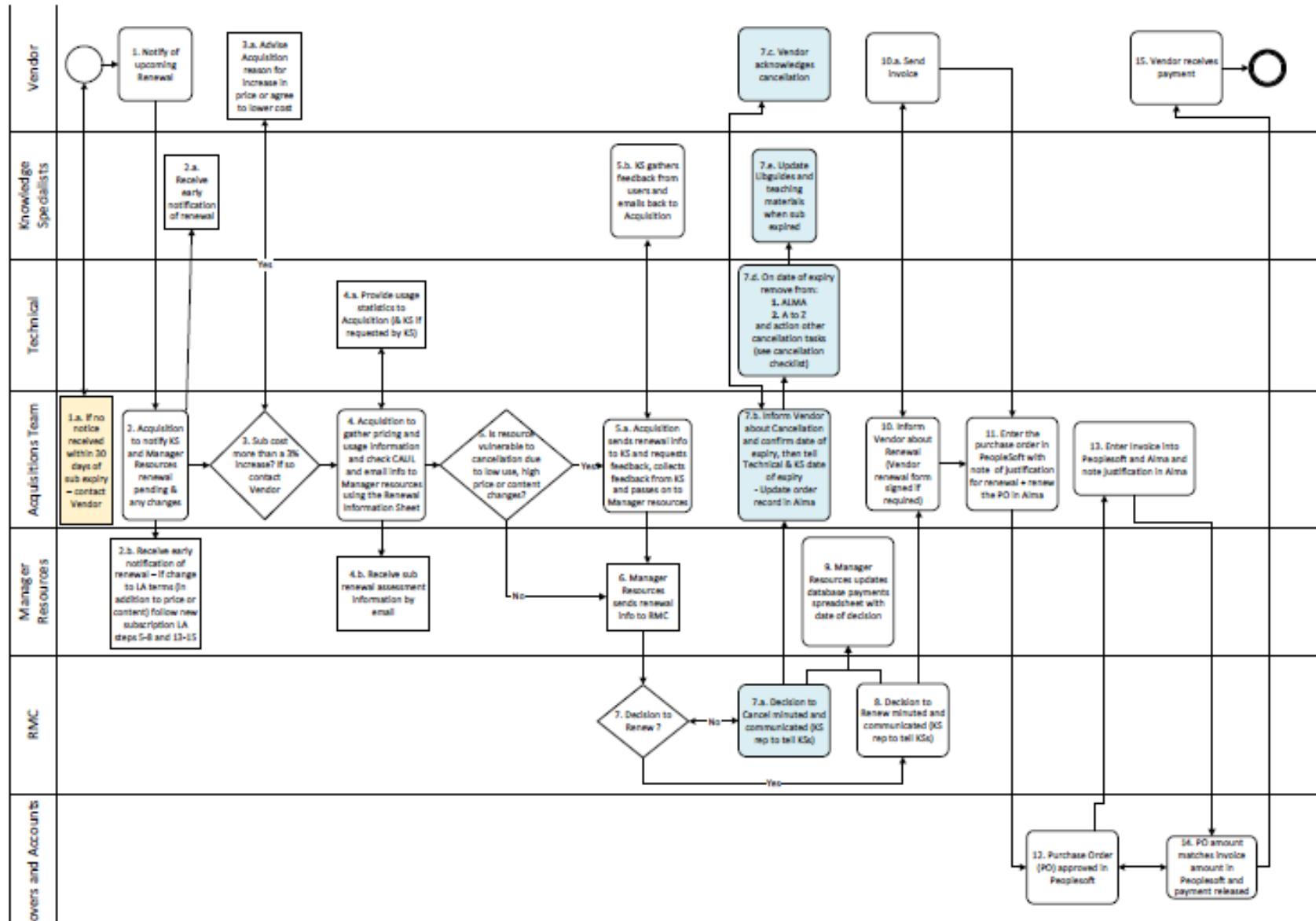
## Step 3: Address concerns & opportunities

- Meet to address concerns / opportunities
- Look at process together
- Suggest changes to process and discuss
- Make changes to flowchart on the screen or on paper as we suggest/agree them



# Step 4: Agree new process

E-resource Subscription Renewal and Cancellation process – final version as at 14/6/16





## Step 4: Associated checklists, forms

-resource renewal information sheet used to decide renewals|

Title	Vendor	Cost 2016	Cost 2017 (note any CAUL offers)	Native % increase (If native \$ increase is more than 3% what is Vendor's reason?)	Usage summary	Usage detail	Decision																
Emerald Premier eJournal Collection	Emerald	GBP 11,095 NZD \$20,840	GBP 11,428 NZD \$21,465	3%	Excellent only \$3.44 per full text	<p><b>Emerald Management Xtra 300</b></p> <table border="1"> <caption>Cost Data from Chart</caption> <thead> <tr> <th>Year</th> <th>Cost per search</th> <th>Cost per full-text</th> <th>Cost per abstract</th> </tr> </thead> <tbody> <tr> <td>2014</td> <td>\$6.54</td> <td>\$5.35</td> <td>\$40.35</td> </tr> <tr> <td>2015</td> <td>\$5.67</td> <td>\$2.53</td> <td>\$13.26</td> </tr> <tr> <td>2016</td> <td>\$2.14</td> <td>\$3.44</td> <td>\$14.62</td> </tr> </tbody> </table>	Year	Cost per search	Cost per full-text	Cost per abstract	2014	\$6.54	\$5.35	\$40.35	2015	\$5.67	\$2.53	\$13.26	2016	\$2.14	\$3.44	\$14.62	RMC agreed to renew <b>ACTION: SB to renew</b>
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# Example: Cancellation checklist

Resource name	Libguide pages updated (KS)	removed from LibGuide asset registry (Vince)	removed lesson plans / handouts (KS)	removed Moodle (KS)	Vendor Copyright TOU (Rolani/YS)	Alma e-resource deactivated	Alma bib (David/Vin)
Journal of Ecotourism	n/a	n/a	n/a	n/a	n/a	done	suppressed
Journal of Housing and the Built Environment	n/a	n/a	n/a	n/a	n/a	done	other resources avail
Journal of International Communication	n/a	n/a	n/a	n/a	n/a	done	suppressed
Journal of Magnetic Resonance Imaging	Y	n/a	Y	Y	n/a	done	suppressed
Journal of Management & Organization	n/a	n/a	n/a	n/a	n/a	done	other resources avail
Journal of Radiotherapy in Practice	Y	n/a	Y	Y	n/a	done	suppressed
Learning disability practice	n/a	n/a	n/a	n/a	n/a	done	other resources avail
Mantis : Manual Alternative Natural Therapy Indexing S	Y	done	Y	Y	done	deleted	deleted
New Zealand Journal of Crop and Horticultural Science	n/a	n/a	n/a	n/a	n/a	done	other resources avail
Nursing children and young people	Y	n/a	Y	Y	n/a	done	other resources avail
Nursing management	Y	n/a	Y	Y	n/a	done	other resources avail
Nursing older people	Y	n/a	Y	Y	n/a	done	other resources avail
portal: Libraries and the Academy	n/a	n/a	n/a	n/a	n/a	done	suppressed
Primary health care	Y	n/a	Y	Y	n/a	done	other resources avail
Psychosis : psychological, social and integrative approach	Y	n/a	Y	Y	n/a	done	suppressed
RAPAL journal (Research and Practice in Adult Literacy)	n/a	n/a	n/a	n/a	n/a	done	suppressed
Ultrasound : journal of the British Medical Ultrasound Soc	Y	n/a	Y	Y	n/a	done	suppressed
Urban Ecosystems	n/a	n/a	n/a	n/a	n/a	done	other resources avail
Voluntas: International Journal of Voluntary and Nonpro	n/a	n/a	Y	Y	n/a	done	other resources avail



## Did we succeed?

**Our objective** was to improve our processes to enable:

- Better management of our e-resources
- Everyone on the same page and working together

**Overall results:**

- Our processes are more effective.
- Knowledge is now captured in an easily understood format
- Processes are better understood and staff involved work well together



## Lessons Learned

- Took longer
- Easier if already have 'as is'
- Getting people together
- Participation
- BA left mid project
- Timeline





## Questions?

We are happy to share our flowcharts and checklists with you.

Contact:

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Many thanks for this opportunity to share our work with you 😊