

Presented by Donna Runner, Manager Electronic Resources

Verde

**Electronic Resource
Management**



Key Points

Why did Monash choose Verde as its ERM?

How has the implementation progressed since the decision?

- The wonderful aspects

- The good parts

- The things that we would do differently

What was the timeline and project plan?

How about the training?

Who has been involved?

How much time does it take?

What are the success criteria?

When will Monash be finished?

Where do we want to be in January 2010?

Valuing colleagues



Key Point 1 : Why did Monash choose Verde as its ERM?

In 2008, >50% of the Library budget for collection development was spent on electronic resources.

However, management of the acquisition, licencing, access, cataloguing, renewal, and cancellation of electronic resources has not been systematic. This is not because current and past staff and managers have failed to attempt ER management, but rather that the previously purchased software – Meridian – did not fulfill expectations.

The staff of the Electronic Resources Department relied on in-house Excel spreadsheets, Voyager Acquisitions, and the services of Serials Solutions to attempt to manage acquisition, licencing, access, cataloguing, renewal, and cancellation of electronic resources.



Key Point 1 : Why did Monash choose Verde as its ERM?

In-house Excel spreadsheets and Voyager Acquisitions were inadequate for the challenge of managing a large digital library collection.

Verde had several major advantages, as compared to the alternatives :

- Monash University Library is committed to the use of ExLibris products

- Verde uses a Central Knowledge Base that links to the SFX software already in use; and, can cope with the large number of resources that Monash acquires

- Verde is part of an ExLibris development path that will integrate the ERM with the Acquisition, Serials, and Cataloguing modules for Universal Resource Management

- Verde has sufficient complexity to distinguish e-interface, e-package, e-standalone, and e-constituent records – each of which can have acquisitions, licence, access, administration, cost, and usage records

Key Point 2 : How has the implementation progressed since the decision?

The wonderful aspects

- Face-to-face Training, with excellent training manual
- Weekly project calls with Ex Libris and Library Systems Manager
- Project plan that has mostly stayed on target and met deadlines

The good parts

- SFX Synchronisation
- Existing server space and conceptual knowledge of ERM
- All Licence agreements already scanned as pdf files
- Verde documentation

The things that we would do differently, if only we could

- Unexpected absence of our Project Manager for several weeks
- Lack of skilled staff time during the testing phase



Key Point 3 : What was the timeline and project plan?

Timeline :

July 2008 – Decide

August 2008 – Purchase and sign contracts

September 2008 – Set-up Hardware and install Verde software

October 2008 – Face-to-face Training, RMIT visit

November to early December 2008 – Testing Phase and SFX synchronisation

End December 2008 – Move to Production Phase

January 2009 – Post-implementation operationalisation

February 2009 – End Project Plan and Evaluate project results

February – December 2009 – Populate, populate, populate.....

January 2010 – Celebrate success!



Key Point 3 : What was the timeline and project plan?

Project Plan :

- Project Definition and Planning
- Installation
- Application Training
- Testing
- Synchronisation
- Data Migration
- Production Load
- Project Evaluation

Plan for Continuous Tasks : KnowledgeBase Updates, Back-Ups, and Service Pack Installations

Key Point 4 : How about the training?

Pre-Training Discussions

Two Days of face-to-face, at the keyboard, well-organised Training

Manual and exercises to accompany training



Key Point 5 : Who has been involved?

Ex Libris Project Manager : Jo-Ann Rivers

Monash University Library :

Project Manager – Serials Librarian, L. Sefton

Project Sponsor – Director Information Resources, S. Clarke

Manager, Electronic Resources – D. Runner

Officers in electronic resources, electronic cataloguing, & serials

Library Systems Manager – S. Huggard

Library Systems support staff



Key Point 5 : Who has been involved?

Synchronisation of the SFX KnowledgeBase and the Verde KnowledgeBase is a key advantage of choosing Verde as Monash's ERM. Key participants to synchronise the KnowledgeBase and to maintain synchronisation were/are :

AARLIN Officer at Monash – Siaw-Wan Chong

Ex Libris Project Manager – Jo-Ann Rivers

AARLIN [*AARLIN is an Australian Research Council (ARC) & Commonwealth Department of Education, Science & Training (DEST) funded project aiming to provide a collaborative research information infrastructure*] – M. Horn and team

Library Systems Manager – S. Huggard and Systems support staff



Key Point 6 : How much time does it take?

There is never enough time, is there?

At least a full week per staff member who will use Verde – for the training and testing phase.

At least an hour per record to be entered into Verde ?

Naturally, all the usual work has to continue during implementation !



Key Point 7 : What are the success criteria?

If all criteria are met, then SUCCESS!

Successful completion of this project will be measured as follows:

95 % completed and 100% accurate Organisation records for all consortium, interface providers, licencing agents, vendors, and licensors from whom Monash University Library obtains electronic products

95 % completed and 100% accurate Electronic Product records for each E-Product, including product type and its selection status

Establishment of electronic resources workflows for trial, selection, acquisition, renewal, and cancellation that improve staff productivity and provide quality outcomes for users

The above goals to be achieved by the end of 2009.



Key Point 8 : When will Monash be finished?

Moved from the test server to the production server on 22 December 2008.

Implementation phase will be completed by Friday, 6 February.

In addition to the success factors in the project plan
All Licence records will be entered into Verde by end-2009, with full and complete details for licences valued at >\$200,000.



Key Point 9 : Where do we want to be in January 2010?

Using a fully-populated electronic resource management system !

As Manager Electronic Resources, I want to be able to answer questions such as :

Which of our electronic subscriptions permit articles to be used to fulfill document delivery requests shared by researchers with research colleagues elsewhere deep-linked from electronic course materials

What comments were made on this resource when it was trialled

How often, for how long, was this resource inaccessible last year

What are the perpetual access provisions for this backset of journals

AND

Ready to move to URM when it becomes available from ExLibris



Key Point 10 : Valuing colleagues

Ex Libris Verde Users worldwide have membership in the Verde Discussion List <VERDE-L@LISTSERV.ND.EDU>

Monash acknowledges the demonstrations, advice, and reassurance received from colleagues at RMIT during our email exchanges, telephone calls, and a full-day visit on 30 October 2008

Continuing contact with other libraries that have, are, or will implement **Verde** would be appreciated

Contact

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