E- Resources Management and Workflow Team

Project Name:

E-Resources Management and Workflow Team

Project Sponsor:

Alma Implementation Steering Committee

Project Description and Purpose:

The E-Resources Management and Workflow Team will be responsible for reviewing policies and procedures related to e-resources activities, developing and implementing Alma workflows related to e-resources, and ensuring that staff involved with e-resources activities have the necessary knowledge and training.

Project Assumptions:

- Alma will improve management and workflow of the library's electronic resources
- There will be opportunities to review, update and automate processes and procedures
- Alma workflows may necessitate policy and responsibility changes
- This Team will work in communication with the Acquisitions Team, the Migration Team, and the Resource Management Team in order to coordinate cross-functional workflows

Project Scope:

The E-Resources Management and Workflow Team will gain full understanding of the functionalities in Alma including license management, harvesting of usage data, coordinating description, and ongoing management of all electronic resources. The team will establish and document new interdepartmental workflows and recommend necessary (organizational) structure changes to maximize efficiencies.

Project Deliverables:

Initial Project Deliverables:

- *Preliminary Project Plan & Milestones*
- *Preliminary schedule/timeline of activities*
- *Define roles (as needed) for team members*

Project Deliverables:

- Gain thorough knowledge of electronic resources lifecycle in Alma
- Document workflows and best practices for electronic resources (databases, e-books, e-journals, datasets, streaming media, epub, etc.) that optimize the benefits of Alma
- Develop a transition plan for existing ERM tools & procedures (e.g. SFX and Serials Solutions)
- Develop procedures for e-resources collections not available in Alma Knowledge Base
- Gain understanding of usage statistics tracking in Alma
- Review documentation and consult with Migration Team regarding ERM data (Serials Solutions, SFX, ERLR, Ebsco [DT] and other vendors), usage statistics, and analytics
- Communicate the new workflows or procedures to staff members in stakeholder departments and provide training as necessary
- Work with the migration team to ensure smooth migration of electronic resource data from different sources (e.g. Films on Demand, Kanopy, Gov Docs, Alexander Street Press (AV), print DDA)
- Coordinate with Migration Team to iteratively test and identify issues with migrated e-resources data

Project Milestones:

- E-resources license management workflow / plan
- E-resources cross departmental workflows
- Train relevant stakeholders

Project Team Leader:

Ian Knabe (UHL) (co-lead)
Melody Condron (UHL) (co-lead)

Project Team Members:

Xiping Liu (UHL)
Judy Parsons (UHL)
Rosana Salinas (UHCL)
Amanda McClendon (UHD)
Frederick Young (UHL)
Berina Gywnn (UH Law)

Nora Dethloff (Ex-officio)
Annie Wu (Ex-officio)
Richard Guajardo (Ex-officio)

Project Stakeholders:

Staff in Acquisitions, Metadata and Digitization, Assessment & Stats Coordinator, and Resource Discovery Systems

Project Expenses:

Possible expense on replacement of EzProxy with OpenAthens

Project Approval Requirements:

Alma Implementation Steering Committee
Resource Management Team
Acquisitions Team (Procurement decisions)
Migration Team (for configuration option selections)

Project Start and End Dates:

December 2018 - July 2019 (allows for continuation past go-live date to address any remaining issues)

Revision History/Change Control:

Note here any substantive changes to this project charter, including names and dates where applicable.

Changes to this document or other project parameters should be submitted in writing (paper or email) to the project manager and must be approved by the Alma Steering Committee.

Issue Log/Conflict Resolution:

For continuous improvement, project leads should capture any process problems in an Issue Log for review by the Alma Steering Committee. Project managers and Steering Committee members are available to assist in resolving conflicts that may arise during project execution.

Acknowledgments:

Both the project sponsor and the project team leader should acknowledge the contents of the project charter to confirm shared understanding of responsibilities and expectations.

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Alma Steering Committee   Ian Knabe, Melody Condron

Approved 14 November 2018