Moderator Introduction

- "Changing Course Reserves Systems: Tumult Creates Teamwork," is an example of how a dramatic change in a service platform, under a tight deadline, can open the door to deeper collaborations, improved processes, and improved services for patrons. In Summer 2015, the House Undergraduate Library and the Health Sciences Library at the University of North Carolina at Chapel Hill decided to merge two reserves systems together, move to a new platform, and be operational within 6 months. Presenters are Noah Savage, Reserves Manager, Undergraduate Library; and Claire Kozak, Assistant Reserves Manager, Health Sciences Library; and Suchi Mohanty, Head of the Undergraduate Library.
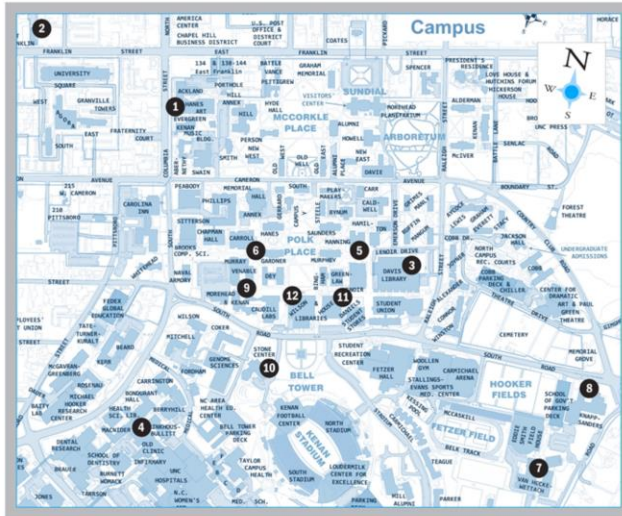
Changing Course Reserves Systems: Tumult Creates Teamwork

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- Variety of formats

- Distributed library system

- Multiple access points

SUCHI

A year ago - the reserves landscape at UNC was a bit like the Wild West

Books, articles, exams, media, even dental kits!

UNC has a distributed library system - offering physical reserves in 8 campus libraries and electronic reserves in 2 libraries (UL and HSL)

Students had 3 places to search - there were 3 possible places for you to search (catalog, UL, HSL)

Faculty had to take their materials to each host library - some faculty may have materials on reserve at multiple locations and online, so we put a lot of work on them to figure out our system

The Problem, Part 1
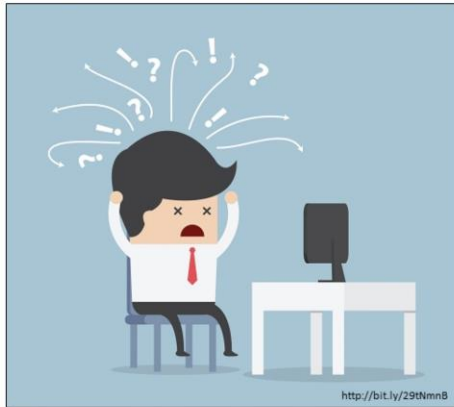
- Poor customer service from vendor

- Platform problems

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Problems with the vendor and platform:
- Poor communication and support from vendor
    - Inaccurate usage stats,
    - Billing issues
    - Constant delays on promised upgrades
- Inconsistent functionality in Internet Explorer, resulting in confused students and faculty
- Out of compliance with campus security standards because software wasn't released on schedule

The Problem, Part 2
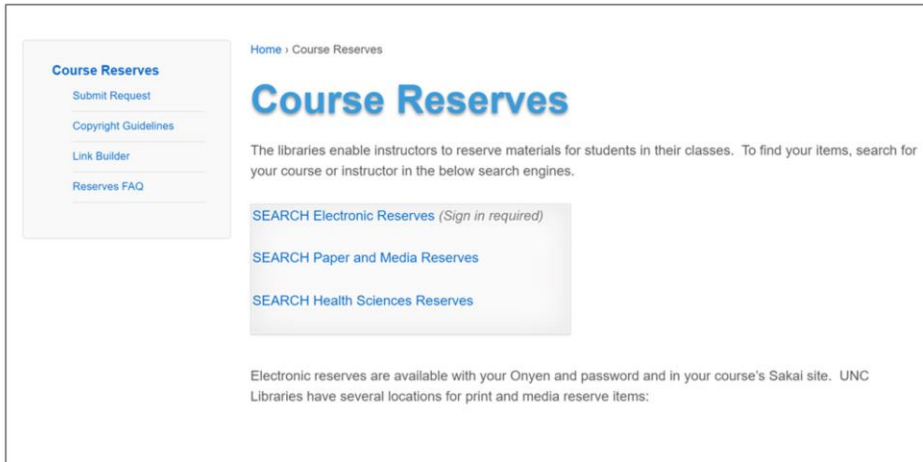
SUCHI

- 2 separate installations of the same product electronic reserves implemented when the University Library and HSL were separately administered –
- Resulted in 2 different installations of the same product that were independently maintained –

- result was duplicated work for our technology staff and confusion for patrons.

The Solution

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Find a product that actually meets our needs!

UL staff researched other reserves platforms - advised ARES based on feedback from other institutions and our internal needs

Library stakeholders were on board with this choice, so we were able to move ahead and set a timeline for implementation. Based on factors such as:

- academic year deadlines,
- compliance with ITS security needs, and
- expiring licenses

We gave ourselves an ambitious 6 month implementation period.

Noah is going to tell us about the goals and process of implementing Ares.

Transition Oversight

- Transition led by Undergraduate Library and Health Sciences Library staff
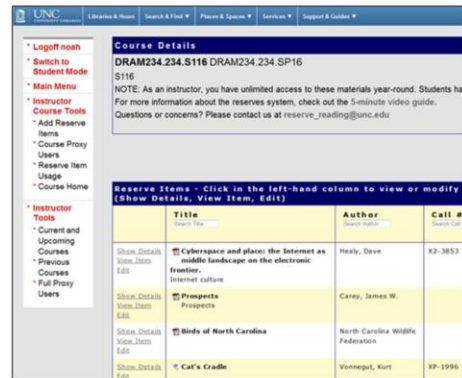

NOAH

Transition Goals

- Import Docutek and Millennium data into Ares

- Configure Ares to suit the needs of students, faculty, and the other libraries

- Train relevant library staff

- Explain the changes to students and faculty

NOAH

Data Migration

- 2 independent implementations for E-reserves

- 8 locations for physical materials

- 50,000+ materials imported, with over 1 million units of metadata

NOAH

NOAH

User Interface

- Goal 1: minimize complexity
  - Require the minimum amount of citation information
  - Requests for certain formats routed to the proper library automatically

- Goal 2: maximize convenience
  - Available via LMS or the main library web site
  - All user data added automatically

NOAH
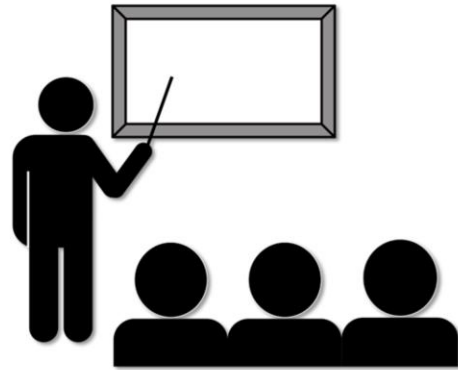Goal 1:
- design a system that would not require prior training
- Display as little information as possible (moved from slide)

Staff Training

- Both group and individualized training sessions for staff who process reserves

- Basic access information sent to all staff

- Coached subject librarians on benefits of using Ares

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, video sent to all library staff
Hard-coded in menu

Partners Needed

KEEP CALM AND START COLLABORATING

Library and Information Technology

Office of University Registrar

Campus Information Technology Services
- Data security
- Learning management system (Sakai)

SUCHI
To ensure some core functionality, we needed **buy in and fundamental support** from our internal and campus partners:
3 things we needed others to help us accomplish:
1. Set up a new server
2. Negotiate with the registrar's office to import class information automatically
3. Configure Ares to connect to Sakai, the course management system used at UNC

Partners Needed

KEEP CALM AND START COLLABORATING

Library Information and Technology
- Existing relationships
- Existing processes
- Entrée to registrar staff
- Server administration
- Proxy administration
- Reserves staff technical support

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L&IT was a core partner from the get go-
- we were able to build off of their existing relationships and processes so we weren't starting from scratch.
- Most importantly, via their existing relationship with campus IT we were able to make necessary connections with the Office of the Registrar.

Partners Needed

KEEP CALM AND START COLLABORATING

- University Registrar
  - Packaged student and course data
  - Advised on matters related to student data

- Campus ITS
  - Concerned about secure storage of user data
  - LDAP for authentication

- Learning Management System
  - Integral to all aspects of implementation – testing and linking Sakai to Ares

SUCHI – high level view

Registrar's contributions –
- Concerns about how many staff could access the data and FERPA compliance
  - We were able to educate them on how libraries already interact with student data via the ILS and that staff are already FERPA trained - my perception is that this made them more amenable to working with us
- Advised that student data be purged regularly to ensure
- Determined that data extract similar to that for Sakai so we were able to piggyback on work that was already being done

Campus ITS
- Library systems staff had access to secure storage for patron records already

Sakai staff (also part of ITS)
        Set up test site in Sakai
        Link records with Ares
        Schedule for semester loads

Partners Needed

- University Registrar
  - Use "statuses" registrar uses
  - How auditing students get added
  - Instructor and instructor proxy

- Campus ITS
  - IT risk form
  - What format (send sample)

- Learning Management System
  - How are course sections handled
  - Frequency of data updates
  - How are cross listed courses handled
  - Promotion help: daily message used

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Specifics, details

Benefits of Implementation

- Enhanced communication

- Evaluation of past practices

- Enhanced user experience

- Staff growth

CLAIRE

Communication Among Libraries

Enhanced communication
- Uniform system allows collaboration
- Libraries working together with Ares support

Unified voice with faculty
- Creation of uniform work flows, videos, and FAQs

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CLAIRE

Enhanced communication:

-Library staff has been able to communicate easily about problems or questions because they are all using the same client and using the same tools. Ares client allows staff to toggle between home libraries (House Undergrad, Health Sciences, etc) to easily help each other troubleshoot, instead of the divide and tailored implementation faced in the previous system.

-Ares support has played a key role in creating a smooth transition into the new system. As the transition to Ares became a solid plan, training and collaboration were at the forefront. Ares provided a wealth of information through training videos and packets, online support through email, and weekly conference calls with the core UNC library reserves staff to discuss best options and practices for UNC libraries as a whole. The conference calls allowed staff and Ares support to work together in real time, fine tuning things such as the interface of the client and the importation of legacy data.

Unified voice with faculty:

-The collaboration among library staff, and between library staff and Ares support, has created a solid foundation of support for the faculty we aim to serve. Library staff

has gained a uniform understanding of the Ares system, which has allowed us to in turn give out concise and uniform information to our users. How-to videos and FAQs created for faculty can have one uniform message and can be used across libraries, regardless of discipline.

Evaluation of Past Practices

Saving time and space
- Decommissioning paper X-files
- Eliminating link checking

Providing new services
- Scanning services now provided
- Increased efficiency

<u>Elimination of redundant work has been the greatest benefit.</u>

CLAIRE
Saving time and space:
- (Noah or Suchi expand on this if you can?)

Providing new services:
- The two main <u>libraries</u> which have electronic reserves, UL and HSL, have both implemented a service to scan materials to make available on reserve. Because these two <u>libraries</u> are largely e-reserve based, this scanning service is more convenient to the faculty, who may not find the time the hunt down material, scan it and upload it to Ares. Libraries are able to efficiently provide these service with the help of innovative technology and with the help of student assistants in the scanning process. The UL has seen a drastic reduction in the time taken to scan items with the help of a (what kind?) scanner, which cuts the scan time from (what to what?)

- Elimination of redundant work has been the greatest benefit, <u>and has allowed us</u> to focus more time and energy on faculty needs. <u>With the time saved we were able to offer a pull and scan service.</u>

Enhancing User Experience

Reserve Item: Article * Indicates required field

Item Information

* Journal Title
* Article Title
Journal Volume
Journal Issue
Journal Year
* Article Author
(Last Name, First Name)
Inclusive Pages

Faculty
- Uniform, simplified submission form
- Quick access to current and previous semester material
- Expanded support across libraries

Students
- Easy access through Sakai
- One uniform list of materials

CLAIRE

Enhancing user experience has been the ultimate goal in this transition to a new system. We had to evaluate what our users needed and meet them where they are to improve their experience.

Faculty:
- By having a uniform course reserve system, we were also able to have a uniform, simplified submission form. Previously, faculty would have to hunt and search for the forms and steps for submitting their material, making sure they submitted to the correct library. It was just a confusing process in general, with too many steps. A simplified form allows the user to access one form online, which is routed automatically to where it needs to go. No need for guess work or extra work on the part of faculty or even staff. The form gives more control back to the faculty member, by allowing them to choose whether they provide the materials or if they would like library staff to scan or search for the reserve materials.
- Materials are easily accessible for faculty to review, in both current and previous semesters. This allows faculty to edit or change current semester materials with ease, as well as allowing them to review materials and make decisions to keep, add or delete materials for the upcoming semester. This again puts the control

back into the faculty member's hands.
- Expanded support across libraries, again, is a huge benefit to this system. A faculty member can talk to a course reserve staff member at any library and have their questions answered.

Students:
- Making the new course reserve system user friendly for students was especially important. By linking the Ares system with Sakai, we were able to meet the students users where they are, adding just one simple click to see all their materials in one place. Students benefit from having easily accessible materials because their daily lives are already busy and complicated enough. Students do not need to adhere to different policies for different libraries or types of materials, they have just one place where they can find all the course reserve info they need.
- Once directed to the Ares page for their course, the student will find all the materials consolidated into one list, regardless of format, location, etc. PDFs and links are available immediately, and print reserves are listed and their location explained (UL, HSL, etc.). An additional convenience is the "Tags" feature that allows the students to search for material based on denoted terms or phrases, provided by the faculty or created themselves. Examples could include "week 1" for readings in the first week, or even "PDFs" if they wanted to look for just PDF materials. This "Tags" features tunes into innovation that students are used to seeing today, hashtags that make topics instantly available, and helps put control into the students hands.

Staff Growth

Increased Involvement

- At least 30 staff and subject librarians

- Student assistants

- Leadership roles

- Recognizing peers

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Because this transition was so <u>widespread</u>, many staff members played a part and in turn allowed us to grow as a whole.
-At least 30 staff and subject librarians were involved in the transition to Ares, and continue to play a role everyday. Course reserve staff members at each library took on the task of learning a whole new system, editing their existing online presence to reflect the changes for users, and providing direct notice to their faculty via email updates and information. Subject librarians and student employees play a role because they have direct contact with faculty users, making them the perfect bridge to providing faculty <u>alerts and </u>information about the new system. Staff members in IT worked hard to make sure the servers were ready for the new system, and that the Ares system would link to Sakai, a crucial part of enhancing the user experience.

We saw certain staff members stepping up to leadership roles, collaborating and helping each other learn and answer questions

Lessons Learned

- Accelerated timeline requires close teamwork

- Decision making: what's best for user drives the day

- Multiplier effect of communication

- Challenges are a growth opportunity

LESSON LEARNED

http://bit.ly/29McTMQ