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Biz of Acq -- Collecting in the Cloud

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Biz of Acq — Collecting in the Cloud

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Out With the Network (Drive),
In With the Net

Using technologies to streamline services is old news at most libraries. Tools such as online video tutorials, elaborate subject pages, and online forms have been quickly adopted at the reference and circulation desks to both guide our users and solicit their input about our services. At the same time, our collections are an ever-richer mix of online journal packages, eBooks of various stripes, databases, and streaming media. And yet, some of our library selection tools and procedures missed the tech wave.

When we took on collections coordination duties, we inherited a system that had seen the University libraries through major changes, from a predominantly print-based to a largely digital collection, not to mention wild budget vacillations. Our predecessors were extremely thorough and detailed, housing all manner of title lists, budget scenarios, and e-collections statistics on a shared network drive, that, like many such systems, had morphed into an untidy labyrinth of files and folders.

Moreover, collections decisions that required group input largely took place on email. Email is, without a doubt, one of the great communication devices of our time, but does anyone enjoy seeing her/his inbox light up with colleague number 14’s indication that they too agree with the purchasing decision at hand? There had to be a better way!

Cloud Computing, as defined by Wikipedia, is “location independent computing, whereby shared resources provide services, software, and data to computers and other devices on demand, as with the electricity grid. Or more simply, remote computing.” Services like Google apps can help prevent the chaos of a shared network drive overflowing with multiple versions of the same documents, while also making your collection’s docs easier to search and organize. Similarly, tools like SurveyMonkey and Jing can round out your collections processes through simplifying your communication with colleagues about your shared collections decisions. Following are a few of the tools we’ve found most useful:

Google Docs and Sites

Have you ever tried unsuccessfully to locate a particular document on a shared drive, stumbling through Byzantine corridors of folders, eventually resorting to the dreaded Windows search function? Have you ever opened up an important document only to be prevented from making changes because someone else has it open, or worse, find that someone else has already made changes? What if you could

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transform that shared drive into a Website, with a menu, calendar, a place to post minutes, and a place to organize all of your important documents (create sets, word processing, even presentations) without HTML/CSS skills? You may wonder how a Website is a worthwhile improvement on a folder structure on a shared drive. Let’s take a look.

Google has created a series of Web applications, collectively entitled Google Docs that can be used to author documents, spreadsheets, and presentations. If you’ve never used Google Docs before, be warned: this cloud-based productivity toolbox may have you eschewing locally installed software altogether. In fact, Google Docs embodies the “cloud” ethos: lightweight yet powerful, easy to access, and free. For a quick, jazzy overview of what Google Docs can do, see Google Docs in Plain English (listed with tutorials at the end of the article). Another Google application, Google Sites, allows you to easily build a Website and place any of your Google Docs on the Web pages within (kind of like pinning a piece of paper to a bulletin board for display). Google Sites also offers a “File Cabinet” in which to store and share documents, an “Announcements” page for, well, announcements, and the self-explanatory “List” page, which allows you to enter information with a simple form. Combine these elements with some commonsense design, and you’ve got a place to get work done in collections.

Our Collections Committee homepage uses the List feature to display a list of current projects and their status. We use the Announcements feature for our Collection Committee minutes and a box on the home page displays links to the most recent minutes. The menu on the left is completely customizable, and we often include a little “widget” that displays a countdown, for example “10 days until” whatever event you choose, when project deadlines loom. Because the site is designed for sharing with subject librarians, most of the information is organized according to projects like “Book Ordering” or “Reference Purchases” or “Usage Statistics.” Each page usually contains textual information and an embedded Google document or file attachment (can be any format). It’s very simple, but also quite a bit easier to deal with visually than a series of nested folders on a shared network drive.

We think organizing collections work with Google Docs and Sites has some crucial advantages. First, all of the data is automatically and securely backed up on Google’s servers. Second, you can access your information from anywhere, without complicated remote access configurations. Third, it makes collaboration much easier. Group editing of documents is almost simultaneous and you control access to documents, which can be completely private or public, or shared with a few collaborators. And finally, each document has a complete revision history, meaning you can view all of the changes made to a given document and who made them. You can revert to an older version of a document at any time. No more multiple versions of the same document floating around on that shared drive!

Are there disadvantages? Depending on your campus IT department, you may not be allowed to use Google Docs for official campus business. Cal State East Bay uses the enterprise educational version of Google for email/calendar/Web apps, but we actually set up our workflow using Google Sites and Docs before that transition. Second, if you are an Excel master and have complicated formulas and formatting, these features may not transition well to Google Sheets and likewise with Google Docs. Third, though this approach makes information more findable, it does take maintenance and can devolve into chaos if neglected. Finally, and probably most daunting, getting used to cloud-based word-processing and spreadsheets can take some time and pose a challenge for the technologically hesitant. But we encourage you to dive in and start experimenting.

Though we use Google, the same approach can be taken with other software. Sharepoint is a common system available to most of us in higher education and can be customized to behave similarly. Though we found Sharepoint to pose a higher learning curve for our librarians, it might be a better option in certain organizational environments, especially if your IT department supports it. If you just want to create some visual organization with an intranet-like Website, try Weebly. Weebly allows you to create simple and beautiful Websites with point-and-click technology and has both free and low-cost options. Another Web-based option is the Zoho suite of applications, which includes word processing (Zoho Writer) and spreadsheet (Zoho Sheet) functionality, as well as a wiki, project planner, and more.

Survey Monkey and Google Forms

SurveyMonkey conjures images of vine-swinging census-takers, but is in fact a dead-easy online survey tool. You may have already used this ubiquitous service to assess library programs or instruction sessions, and if you haven’t, you’ve almost certainly encountered one of these surveys on your favorite blog or listserv. With a free basic plan, you can create a survey with up to 10 questions and 100 responses. For many collections decisions, this will be enough, but if you need more flexibility or are planning to use SurveyMonkey for other data collection (it’s a wonderful research tool) we recommend upgrading to a subscription account.

SurveyMonkey offers lots of flexibility in terms of question styles, offering a range of drop-down lists, multiple choice, and essay response boxes. Subscription plans allow you to display response data in a variety of ways including bar graphs and pie charts, and also export data as pdf or MS Excel. We put this flexibility to the test in a series of collections surveys. In one of our first uses of SurveyMonkey, we polled our colleagues about potential database cuts, asking them to rank these electronic holdings in light of usage data, program support and cost, and also enter textual comments about their choices. To be sure, this is not the happiest survey topic, but we found it allowed us to get an idea of what our group was thinking before the meeting at which we discussed our decisions. It may seem like a simple approach, but consolidating feedback in a single online location and sharing this information prior to the discussion made for a much more efficient process, and even a shorter meeting!

For collection managers on a shoestring, Google Forms is a fully-featured alternative to SurveyMonkey, albeit with a slightly steeper learning curve. Free with a Google account, Forms is one component of the Google Docs suite. It allows you to store documents online that are accessible from any computer and, better still, these documents can be edited by multiple participants, designated by the document owner. Google Forms essentially makes your survey tool (the form) the public face of a Google spreadsheet. Like SurveyMonkey, you can set your form in a host of ways (multiple choice questions, comments boxes, Likert scales), and once respondents add their data, your spreadsheet is instantly — and tidily — populated. When you are done collecting the data, it’s very easy to share it with your colleagues. Our annual reference purchase suggestion list is entirely managed via Google Forms, which are embeddable within Google Sites, and can even be emailed.

Doodle and WhenisGood

Although it sounds like something you’d use to kill time during a dull meeting, Doodle is actually a meeting scheduler and simple polling tool. We’ve primarily used Doodle and a similar Web application, WhenisGood, to solve the old problem of trying to find workable meeting times for groups. Like Google Forms, Doodle prevents long email chains, organizing all respondents’ preferences in one, central location. While an account is not required, we recommend registering for a free Doodle account, which unlocks advanced features such as syncing with Outlook or Google Calendar, and a dashboard feature that lets you track meeting requests and polls you’ve created or have participated in. Creating a meeting scheduler is a very simple affair. You simply give the meeting a name, add descriptive information if you wish, select some possible dates on a clickable calendar, choose a few possible time slots, then send it off to your group. When you log onto Doodle, you can see who has responded, and available meeting times are clearly marked with a green “okay.” Once all responses are in, you can simply save the chosen time to your calendar and invite participants.

WhenisGood is functionally similar to Doodle, although it looks a bit more like a day planner. To select meeting times, you simply “paint” over your available hours on the calendar-planning grid. WhenisGood also offers advanced features for those who sign up for free accounts, and like Doodle, will even correct for time zones, should you be planning a conference call with a colleague or vendor on another coast.

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Jing

As reference librarians and liaisons to several departments, we will tell anyone who will listen that Jing is the single most useful “explainer” tool ever conceived. Have you ever painstakingly listed out demonstrative steps in an email to a student or colleague (e.g., click here, scroll there, find the button...)? Jing lets you capture quick screen recordings or other videos, upload them to a free online account, and share them instantly. The quality isn’t exactly Final Cut Pro, but on the plus side, with few bells or whistles to contend with, it’s extremely easy to learn. And once you do, you’ll never go back. In our collections process, we use Jing to send out demos of new products and even to train our colleagues on how to use our online book ordering system.

Summing Up

Web-based tools offer countless opportunities to hone your collections process. For little or no cost, you can create collaborative, interactive collections sites, forms, and documents. Below is a resource toolbox to get you up and running.

Tools Roundup

Doodle: www.doodle.com
Google Docs: www.google.com/docs
Google Sites: https://sites.google.com
Jing: http://www.techsmith.com/jing
SurveyMonkey: www.surveymonkey.com
WhenisGood: www.whenisgood.net
Weebly: http://www.weebly.com
Zoho Apps: http://www.zoho.com/

Tutorials:

Google Docs YouTube Community Channel: http://www.youtube.com/user/GoogleDocsCommunity
Search on: Google Docs in Plain English, Using Forms in Google Docs, Google Sites Tour, Jing Overview: http://video.techsmith.com/jing/2.1/overview/default.asp

And They Were There

Reports of Meetings — 30th Annual Charleston Conference

Issues in Book and Serial Acquisition, “Anything Goes!” Francis Marion Hotel, Embassy Suites Historic District, Holiday Inn Historic District, and Addlestone Library, College of Charleston, Charleston, SC, November 3-6, 2010

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Column Editor’s Note: Thank you to all of the 2010 Charleston Conference attendees who agreed to write short reports that highlighted sessions they attended. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect changes in the session titles or presenters that were not printed in the conference’s final program. Slides and handouts from many 2010 Charleston Conference presentations can be found online at http://www.slideshare.net/event/2010-charleston-conference, and the Charleston Conference Proceedings will be published sometime in Fall 2011.

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