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Optimizing Library Services- Agile Management of Electronic Resources: A Charleston Conference Presentation

Lindsay Wertman  
*IGI Global*, lwertman@igi-global.com

Caroline J. Campbell  
*IGI Global*, ccampbell@igi-global.com

Garaldine Rinna  
*Western Michigan University*, geraldine.rinna@wmich.edu

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Just the right information needed to complete a critical assignment. She happened upon an agile management tool, called a Kanban board, that would push reminders to her when time-sensitive tasks needed to be completed. Use of Kanban to manage her workflow quickly evolved into a team space encompassing multiple projects.

In a nutshell, a Kanban board consists of a workspace divided into sections with cards that represent tasks that move through each section of the board. The most common Kanban board configuration is one with “To-Do,” “Doing,” and “Done” columns that contain cards. The cards are the tasks that need to be completed for the project and each card moves through the columns as the work progresses. The project is complete when all the cards end up in the “Done” column.

After successfully testing and implementing a Kanban board to manage personal workflows, the application was introduced to the rest of the ERM team as a possible tool to help us with the arduous task of collecting electronic resources usage statistics, which began to take up more of our time after we migrated to a new ILS. After our migration, we lost the ability to upload any usage statistics, which began to take up more of our time after we migrated to a new ILS. After successfully testing and implementing a Kanban board to manage personal workflows, the application was introduced to the rest of the ERM team as a possible tool to help us with the arduous task of collecting electronic resources usage statistics, which began to take up more of our time after we migrated to a new ILS.

As we were developing our usage statistics project, the agile management tool was quickly adopted by the group to help them keep track of their own routine and irregular tasks. We all have a personal Kanban board that reminds us, for example, to check the import profiles we monitor, the pipes we build to harvest data from our digital repositories, and the addition and deletion of titles in our electronic collections. We have used this system with great success when completing projects such as updating our OpenURL button or our branding images on our vendor platforms. We have ongoing projects to keep track of requests to change the configuration of our discovery layer and our ILS. We have collaborated with people in other units and outside our libraries on projects with and without an end date with great success.
Library Analytics: Shaping the Future — How Analytics Helped Smith College Discover the Best Bento

Column Editors: John McDonald (EBSCO Information Services) <johnmcdonald@ebsco.com> and Kathleen McEvoy (EBSCO Information Services) <k.mcevoy@ebsco.com>

In this month’s column, we’re featuring a project that leveraged analytics around user behavior to inform design decisions around Library Discovery. This column builds on a presentation and previous efforts by Rob O’Connell, Director of Discovery & Access, at the Smith College Libraries to use analytics to help inform their library website redesign and ultimately led to the adoption of a Bento Box style implementation of EBSCO Discovery Service (EDS).

The genesis of the project began with observations of patron confusion caused by the previous implementation of the EDS interface. Librarians reviewing usage logs of EDS saw that most searches were for known-items and that these specific searches were about the students learning how to interact with the materials available. Librarians were regularly incorporating the discovery tool into their instruction sessions but noticed that while students were doing more complex searching during class sessions, they’d go back to simple, familiar keyword searching when working on their own. O’Connell believes that one reason for the high level of known-item and general topic searches was that Smith was marketing its discovery services to first- and second-year students and other novice searchers. He said the high incidence of known-item searching might differ from other institutions. At a comprehensive or Carnegie Doctoral 1 institution, more advanced students might be more database-focused which correlates with some of the observations at Smith where graduate students are more database driven.

The agile management tool we are using allows us to see a visual representation of the projects in terms of incomplete and complete tasks so we can keep track of our progress as due dates draw near, which is not something that we can do using task management features built into our ILS. Using an agile management tool, you can quickly determine if the work of the unit is not in balance or whether a project is not making adequate progress toward its goals. This type of analytics promises to be a valuable tool to inform administration and other units and departments in the library of the work that we are doing.

In a way, all knowledge workers to some extent are project managers, and the general nature of managing the electronic resources life cycle seems to be quite conducive to the incorporation of agile management practices in many of our workflows.

Although not all of our agile projects can be considered successes, we consider our usage statistics project and the use of the agile management tool in general to be successful. We have learned a great deal about project management through both the successes and failures we have experienced while using Kanban. Our agile management tool has helped us streamline many of our workflows, has given us the opportunity to learn new skills, transformed us into a team, helped us equitably distribute mundane but essential work, and has saved us valuable time to better manage electronic resources.

At Smith, they’ve seen user research behaviors indicating that many students start their research with known-item web searching and then move their initial search results into the discovery service. This adds up to the fact that, at least for discovery, there is no “one size fits all” and local mitigation of the interface that works best for each site is important. In 2016, Smith started a rebuild of the library website and had decided upon a bento box approach using modern web design based on the extensive Google Material Design framework (https://material.io/guidelines/) that outlines how to rebuild for the modern web (e.g., motion, dynamic web). The initial redesign was first vetted by librarians, who when first seeing the skeleton were excited about the possibilities of the bento box. Together, the librarians of

References


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We have already started thinking about how we can abandon our current usage statistics project in favor of an overarching ERM project board that will incorporate the process of managing our usage statistics. We are also currently working on mapping the principles of the agile management philosophy to industry standards and the libraries strategic plan, and looking for a way we can use this information to measure the value of the work that we do.

There are many web-based agile management tools freely available or by subscription that libraries can use to augment their current systems. We tested a few and found one that best fit our needs, but they all appear to be scalable to any size library or project that requires that work be completed in a single piece flow, where changes need to be made at any time, and where there is a high degree of variability in the work. Projects are not limited to the number of columns in the Kanban board, or the number of cards that you add. Careful analysis, however, of the project should be done to determine whether Kanban is the right project management tool to employ in each case. We are currently exploring other methods of project management to determine whether we should use them in replacement of our Kanban boards, in conjunction with them, or whether they are conducive to managing our work in a smarter way.

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