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



by **Geraldine Rinna** (Electronic Resources Librarian, Western Michigan University) <geraldine.rinna@wmich.edu>

Column Editors: **Caroline J. Campbell** (Promotions Assistant, IGI Global) <ccampbell@igi-global.com>

and **Lindsay Wertman** (Managing Director, IGI Global) <lwertman@igi-global.com> www.igi-global.com

Column Editor's Note: *In collaboration with the Charleston Conference and IGI Global's long-standing commitment to specialized library solutions, IGI Global's Academic Librarian Sponsorship winner, Geraldine Rinna, an Electronic Resources Librarian from Western Michigan University, outlines her Charleston Conference presentation, "Laying Down the Whack-A-Mole Mallet: One Inexperienced ERM Team's Story About Adopting the Agile Philosophy to Manage Electronic Resources," given on Nov. 8, 2017. — CC & LW*

The transitory nature of electronic resources requires that staff and faculty, working in this realm, keep a vigilant eye out for the myriad changes that inevitably come our way. We are often required to suspend a critical task for a more critical task, and keeping up with all the work we have to do is daunting, if not overwhelming. Electronic Resource Management (ERM) requires agility. If our aim is to provide superior customer service, we must continually adapt to the landscape of the day. ERM systems have made tremendous progress towards managing electronic resources in the last ten years. Unfortunately, they still lack some basic functionality that require us to use additional tools to complete our day-to-day work efficiently, effectively, and with agility.

West Michigan University Libraries ERM unit experienced some major changes after a platform migration, that afforded many opportunities to take on new challenges, but also increased our workload past the point of sustainability. As we were looking for ways to streamline the work of the unit, we happened upon a method of agile project management developed for use in the Japanese auto industry that looked like it might help us keep on top of our day-to-day work, and also equitably distribute some of the new work we were required to complete that had come our way due to a loss of functionality and services after migrating from our old ERM system to a new library services platform.

One staff member, overwhelmed with calendar reminders, two overflowing inboxes, virtual notebooks, ticketing systems, and other various tools used to keep track of all the work she needed to accomplish, started looking for a better way to manage her competing priorities. She needed notifications pushed in a clear and concise way that did not compete with actual meetings on her calendar, and without constantly searching across applications for

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 COUNTER usage statistics report other than the JR1, and needed to archive all our reports for future reference when making collection development decisions. Additionally, we subscribed to a service which would download all our COUNTER reports not harvested via the SUSHI protocol and upload them into our reporting tool. SUSHI harvesting also lost ground, with approximately half the number of configured accounts than our previous system and no way for us to configure them ourselves. This loss of functionality added an additional 200 person-hours per year to the work of the unit and finding a way to streamline this as much as possible while equitably, distributing the work was of paramount importance. We decided to divide the work into three steps:

1. Download
2. Upload and monitor SUSHI accounts
3. Archive

We created a Kanban board that mirrored these steps. We tweaked this project several times as we were working, adding custom fields, tags, and recurring tasks all while in the process of gathering, uploading, and archiving usage statistics.

One of the principles of the Agile Manifesto is to "Build projects around motivated individuals. Give them the environment and support

they need and trust them to get the job done." This required that we collaborate to map the workflows, outline the charter, lay ground rules, and to build, tweak and complete the project. Although this process took valuable time out of every team member's day, the work produced a sustainable, reusable project that initially cut five person-hours per year over the previous method of using a spreadsheet to manage the project, but also allowed us to cut 100 additional person-hours of work each year as a result of our taking a closer look at long standing workflows for the collection, uploading, and archiving of usage statistics and the monitoring of SUSHI harvests. Additionally, there are now three more team members trained in all aspects of collecting and managing usage statistics and the work is equally distributed among them.

Unfortunately, we will have to gather usage statistics for the foreseeable future, but when one of the team members has a brilliant idea that will streamline this process even more, we will easily be able to change the project to fit new requirements and will not skip a beat. Our ILS vendor has recently been expanding the capabilities of our current usage statistics module, and it is our hope that we will one day be able to use the ILS to manage the harvesting, collecting, and uploading of usage statistics from within that platform. We will, however, continue to use an agile management tool until such time that all the work of the ERM unit is manageable within our ILS and offers the agility that we require to provide superior customer service while giving us the opportunity to continually simplify and streamline the work of our unit.

As we were developing our usage statistics project, the agile management tool was quickly adopted by the group to help them keep on top 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.

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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.

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.


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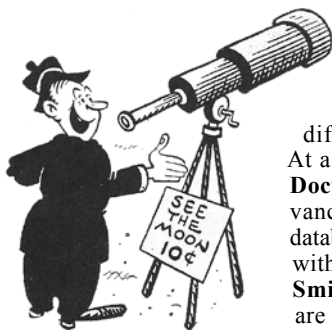
Library Analytics: Shaping the Future — How Analytics Helped Smith College Discover the Best Bento

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 I** 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.

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 after seeing a presentation by librarians from the **University of Alabama** at a user group meeting. **Smith's** goals were to build out 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

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