Dream Team, Assemble!
Strengthening Partnerships and Collaboration across Technical and Public Services

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Agenda

● Example Partnerships
  ○ Georgia Southern - Conducting "rollouts" for new and revised resources.
  ○ University of Georgia - Collecting and sharing patron reports of e-resource problems using LibChat and LibAnswers.
  ○ Georgia State - Collecting and sharing 360° feedback on EDS customizations.
  ○ Georgia Tech - Training public services staff to help with troubleshooting technical services issues and collaborating on implementing and marketing a virtual browsing product (Syndetics Unbound).

● Questions & Answers with the Audience and Panel Members
Georgia Southern

New Resource Rollouts Audience & Message

- **Technical Services**
  - Consistently promote awareness of new resources and services.
  - Ensure personnel have needed information as rollouts expand to university community.

- **Liaisons**
  - Provide notification of changes early for reference and liaison work.
  - Encourage promotion and feedback with faculty.

- **Patrons**
  - Celebrate the new; avoid confusion or disappointment.
  - Increase use through early awareness and buy-in.
Most configuration work complete before any Go-Live announcements.

Resource is “live” well before the Go-Live date.

Conduct final testing and create support materials.

Focus on building liaison awareness prior to public promotion.

Public promotion and support begins at Go-Live.

Liaisons & Promotion Committee take over!

<table>
<thead>
<tr>
<th>Stage</th>
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<th>Date(s)</th>
<th>Implementation Tasks</th>
<th>Communication Tasks</th>
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</table>
| Trial               |          |         | ☐ Obtain base URL(s)  
☐ Verify IP range at vendor  
☐ Verify proxy settings  
☐ Create A-Z list link assets  
☐ Test link assets (local, remote, mobile) | ☐ Trial open notice to liaisons  
☐ Trial participant notices  
☐ Adoption decision  
☐ Trial close notices |
| Adoption and Staging|          |         | ☐ Configure link resolver  
☐ Catalog (database & journals)  
☐ Set OCLC holdings  
☐ Test link resolver and catalog assets  
☐ Draft internal FAQ post | ☐ Release adoption notice to liaisons |
| Go-Live Announcement| Go-Live  | -2 weeks | ☐ Liaison training | ☐ Release liaisons Go-Live announcement |
|                     | Go-Live  | -1 week | ☐ Finalize internal FAQ post  
☐ Draft external FAQ post  
☐ Draft faculty-ready copy  
☐ Draft blog announcement  
☐ Draft Faculty announcement  
☐ Liaison training | ☐ Release liaisons Go-Live reminder  
☐ Release internal FAQ post |
| Go-Live Date        | 0        |         | ☐ Release internal FAQ post  
☐ Finalize external FAQ post  
☐ Finalize faculty ready copy  
☐ Finalize blog announcement  
☐ Finalize Faculty announcement  
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<td>Go-Live One Week Notice</td>
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<td>Go-Live Date</td>
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<td>☐ Revise internal FAQ post &lt;br&gt;☐ Finalize external FAQ post &lt;br&gt;☐ Finalize faculty-ready copy &lt;br&gt;☐ Finalize blog announcement &lt;br&gt;☐ Finalize Faculty announcement &lt;br&gt;☐ Liaison training</td>
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<td>Public Release</td>
<td>Go-Live +1 day max</td>
<td>☐ Revise internal FAQ post &lt;br&gt;☐ Finalize external FAQ post &lt;br&gt;☐ Finalize faculty-ready copy &lt;br&gt;☐ Finalize blog announcement &lt;br&gt;☐ Finalize Faculty announcement &lt;br&gt;☐ Liaison training</td>
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The two weeks leading up to Go-Live give the liaisons time to train on and test the resource, ask questions, and request any corrections or additional support.
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The final Go-Live release announcement and faculty-ready copy include links to the external FAQ and blog posts, which liaisons can use to recapitulate and extend promotion.

- **External FAQ post** adapts content to patron audience.
- **Blog post on library homepage** includes link to external FAQ.
- **Announcement to faculty listserv** includes links to external FAQ and blog posts.
University of Georgia

Managing e-resource problems with LibChat and LibAnswers

Departments: Research & Instruction (Reference) and Acquisitions & Serials

Previous workflow:

Reference receives report of e-resource problem

Can’t resolve problem; sends emailed report to A&S e-resource team

E-resources assistant resolves problem and informs patron
University of Georgia

Issues:

- Incomplete information made replicating the issue difficult
- Patrons sometimes had to explain issue a second time to a different staff member in a different venue
- No centralized location meant the same problems were repeatedly reported
- Reference librarians unclear on how problems are handled
University of Georgia

New workflow

Reference receives problem report via LibChat

Reference librarians see resolution; better able to field similar issues

If unable to resolve issue, creates LibAnswers ticket

E-resources claims ticket, answers patron, and updates status page if needed

Transfers ticket with full transcript to ‘Elibrary’ queue
University of Georgia

Public Status Page

Current status of library systems and apps

- IEEE: Issue Reported
- Agricola: Normal
- Ejournal search: Normal
- Nexis Uni: Normal
- Wiley: Normal
- Ovid journals: Issue Reported
- BioOne: Normal
- Factiva: Normal
- ScienceDirect: Normal
- Campus network: Normal
- Google Scholar: Normal
- Simmons OneView: Normal
- Elsevier resources: Normal
- Nature journals: Normal
- Taylor & Francis Journals: Normal

Updates

- Apr 15 2019, 08:06am Ovid journals: Ovid errors
  Links to articles hosted on Ovid are leading to error messages

- Apr 04 2019, 07:44am Nature journals: Nature journals current content inaccessible
  Patrons may have problems accessing current issues of Nature journals. We are looking into this and hopefully will have this resolved soon.
Georgia State

Culture change for Ebsco Discovery Service:

- Transitioning from a maintenance mindset to a focus on the user experience and enhancement

- Creating a participatory, inclusive, and iterative culture for improving EDS

Photo by David Travis on Unsplash
## Georgia State

### Initial Timeline:

<table>
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<th>Fall 2018</th>
<th>Spring 2019</th>
<th>Summer 2019</th>
<th>Fall 2019</th>
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<td>Site visit with Ebsco Engineer for demo and brainstorming</td>
<td>Series of short surveys for library employees regarding potential EDS enhancements</td>
<td>Gather student input: use Library Advisory Council; informal walk-up testing at all 6 campuses</td>
<td>Formation of Discovery Advisory Group (actual time tbd)</td>
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Georgia State

Discovery Librarian and/or Advisory Group

Input from library faculty and staff

Informal and formal student feedback
Stage 2: Librarian surveys-

Early challenges:

- Soliciting participation
  - Improve communication channels?
  - Survey fatigue?
  - Lack of time?

- Resistance to using/teaching discovery search

Early successes:

- Collected good comments - on topics directly addressed in survey and about EDS in general
- Participation from all campuses
- Good representation from public services:
  - 35% reference or R&E
  - 8% circulation or USTS
  - 4% each from admin and collection development
  - 38% did not specify an area/department
Virtual browsing with Syndetics Unbound

Team

- Technology Program Manager
- Metadata Strategist
- Communications Manager
- Subject Librarian
Georgia Tech

Timeline

- Fall 2014: Migration to ALMA/Primo
- Spring 2015: Virtual Browsing task force formed
- Spring 2016: LSC opens housing 95% of GT Collections
- Fall 2016: Portfolio Management, VB project
- Fall 2017: GT Library implements new Primo UI
- Spring 2018: Syndetics Unbound released, GT implements trial
- Fall 2018: Focus groups w/undergrad & grads
- Spring 2019: video tutorial
Georgia Tech

Staff and user training for OpenAthens

Team

- IT DevOps Manager
- Communications Manager
- Metadata Strategist
- Licensed Content Coordinator
- Subject Librarian
Georgia Tech

Strategies

- Trial
- Newsletter announcements
- FAQs
- Library Faculty Advisory Board demo
- Training for public services staff
- Training for subject librarians

Open Athens Authentication: FAQs, How To

What is OpenAthens?
OpenAthens is an authentication service, which means it allows you to access subscription-based electronic resources both on and off campus. Previously we used EZProxy. OpenAthens replaces that service.

Please note: OpenAthens is a “gateway” service to facilitate access to publisher content. It does not include any content of its own.

When did the change happen?
The Georgia Tech Library activated OpenAthens authentication in mid-May.

Why did we change services?
OpenAthens offers a single sign-on, integrated with Georgia Tech’s authentication service, to access the library’s subscription-based content. End-users are able to access e-resources across service provider sites with just one login.

LEARN MORE
Questions & Answers

- What are the emerging points of contact between technical and public services, and technical services and patrons?

- How do technical services personnel provide education, promotion, and support for library resources? What practices work well, and what can we do better?

- How does technical services’ participation in patron education and support impact technical and public services roles library-wide?