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.

Georgia Southern

- 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!

Stage	Week +/-	Date(s)	Implementation Tasks	Communication Tasks
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 One Week Notice	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			
Public Release	Go-Live +1 day max		☐ Revise internal FAQ post ☐ Finalize external FAQ post ☐ Finalize faculty-ready copy ☐ Finalize blog announcement ☐ Finalize faculty announcement ☐ Liaison training	☐ Release liaisons Go-Live release announcement ☐ Release faculty-ready copy ☐ Release external FAQ post ☐ Release blog announcement ☐ Release Faculty announcement

Georgia Southern

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Two emails prior to Go-Live, one following.

Liaison-focused training and communication supports.

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.

Georgia Southern

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Public Release	**Go-Live +1 day max**		☐ Revise internal FAQ post ☐ Finalize external FAQ post ☐ Finalize faculty-ready copy ☐ Finalize blog announcement ☐ Finalize faculty announcement ☐ Liaison training	☐ Release liaisons Go-Live release announcement 　☐ Release faculty-ready copy ☐ Release external FAQ post ☐ Release blog announcement ☐ Release Faculty announcement

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.

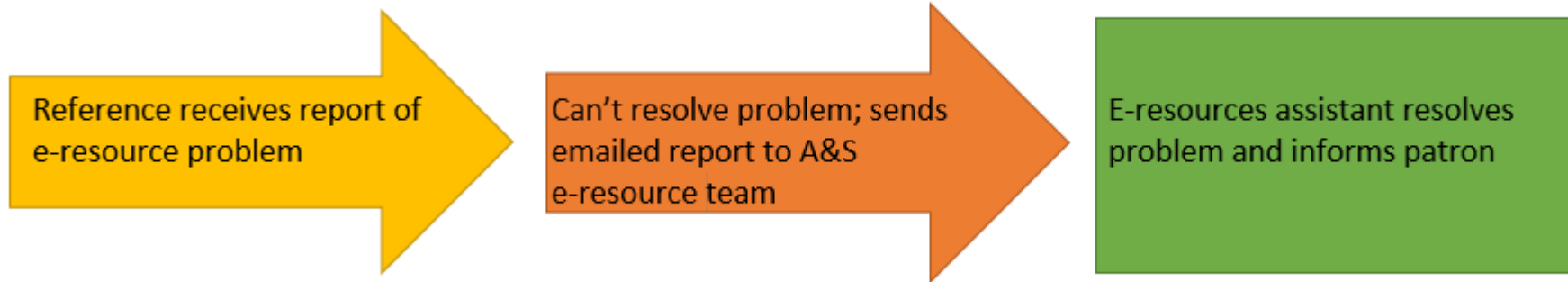Blog post on library homepage includes link to external FAQ.

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
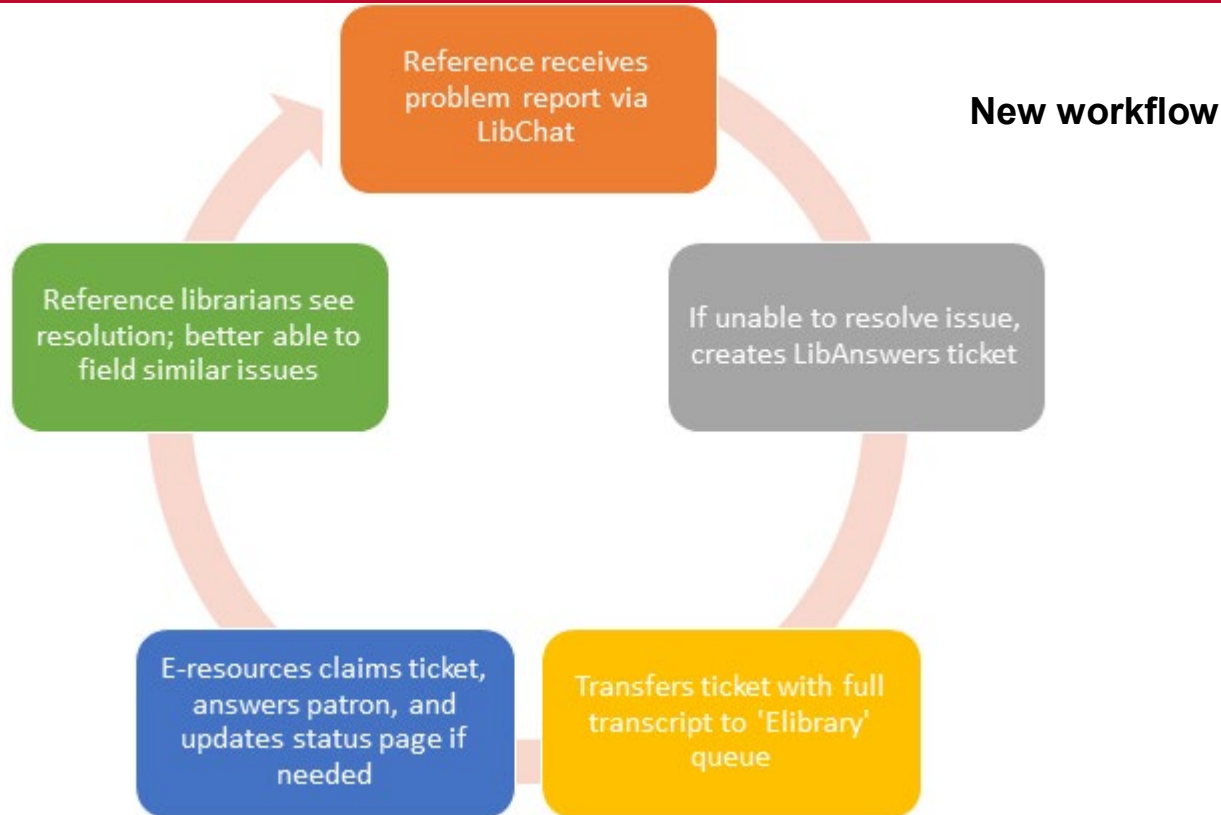
Previous workflow:

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

If unable to resolve issue, creates LibAnswers ticket

Transfers ticket with full transcript to 'Elibrary' queue

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

Reference librarians see resolution; better able to field similar issues

University of Georgia

Public Status Page

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
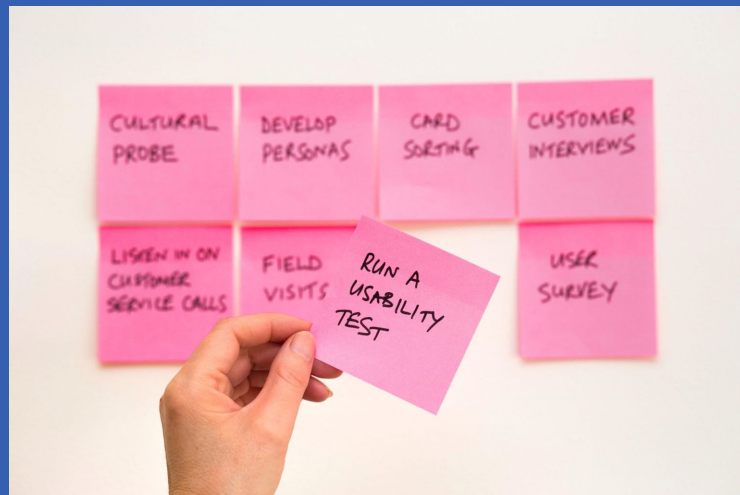
Georgia State

Initial Timeline:

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

Georgia State
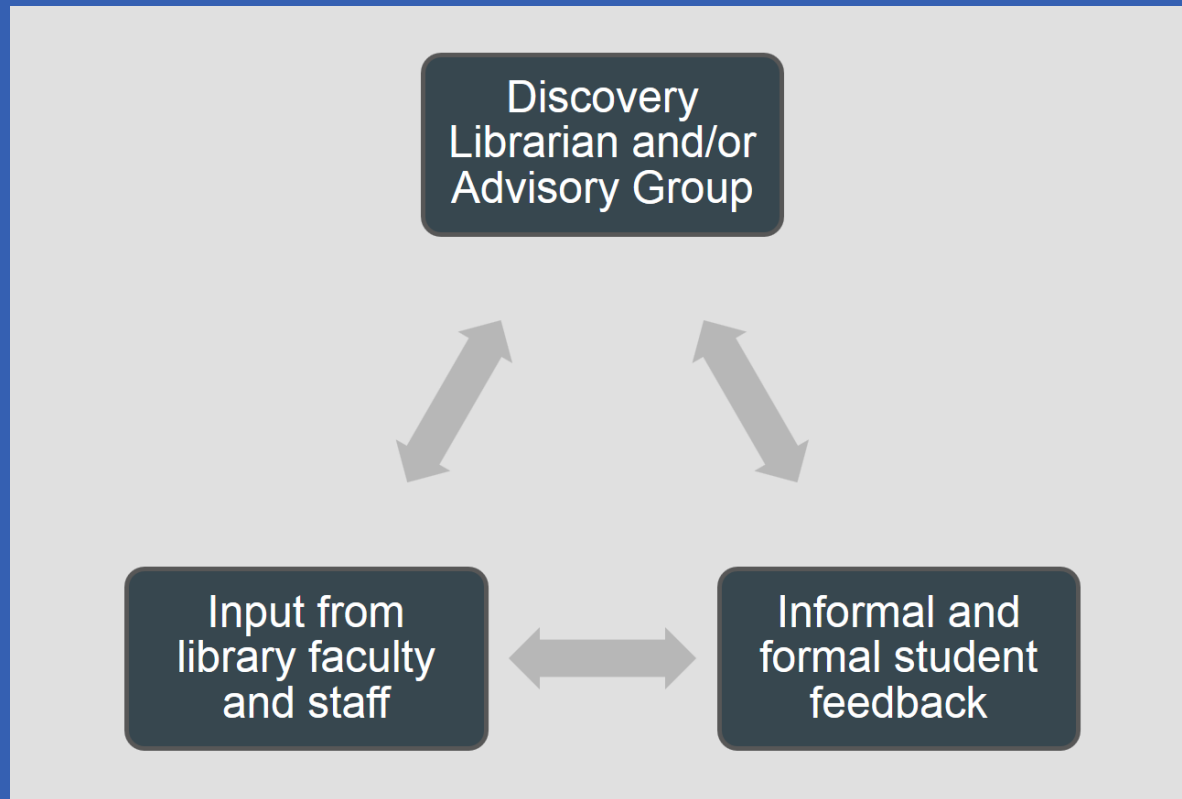
Georgia State

Stage 2: Librarian surveys-

<u>Early challenges:</u>

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

- Resistance to using/teaching discovery search

<u>Early successes</u>:

- 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

Georgia Tech

Virtual browsing with Syndetics Unbound

Team

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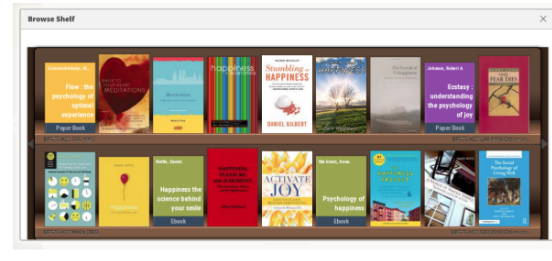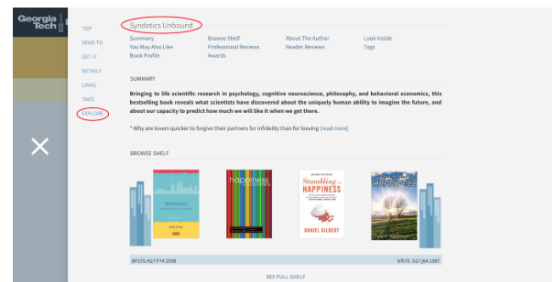- Communications Manager
- Subject Librarian

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
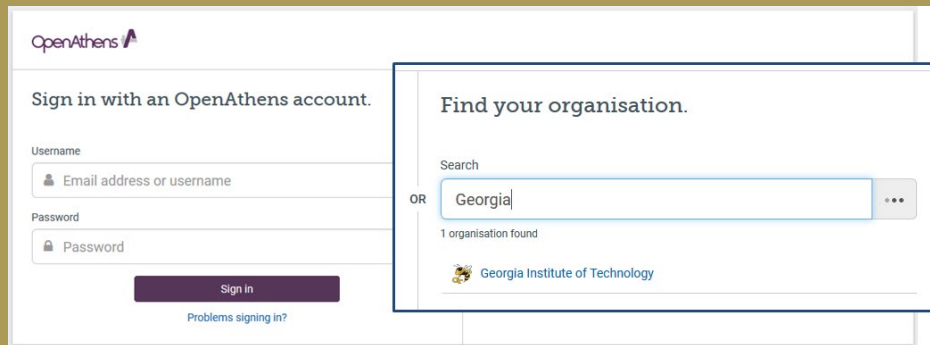- Spring 2019: video tutorial
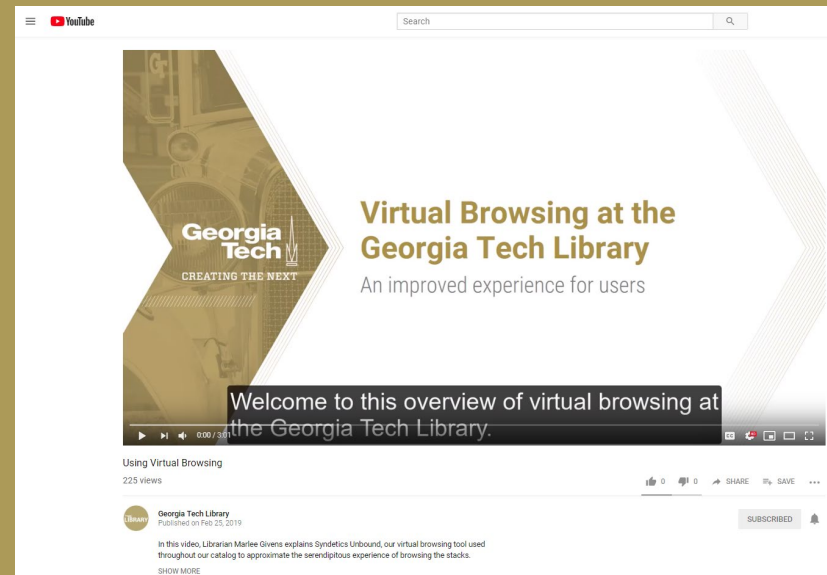
Georgia Tech

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

browsers, clear out your cookies, or use a new computer.

What is OpenAthens?
OpenAthens in 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.

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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?