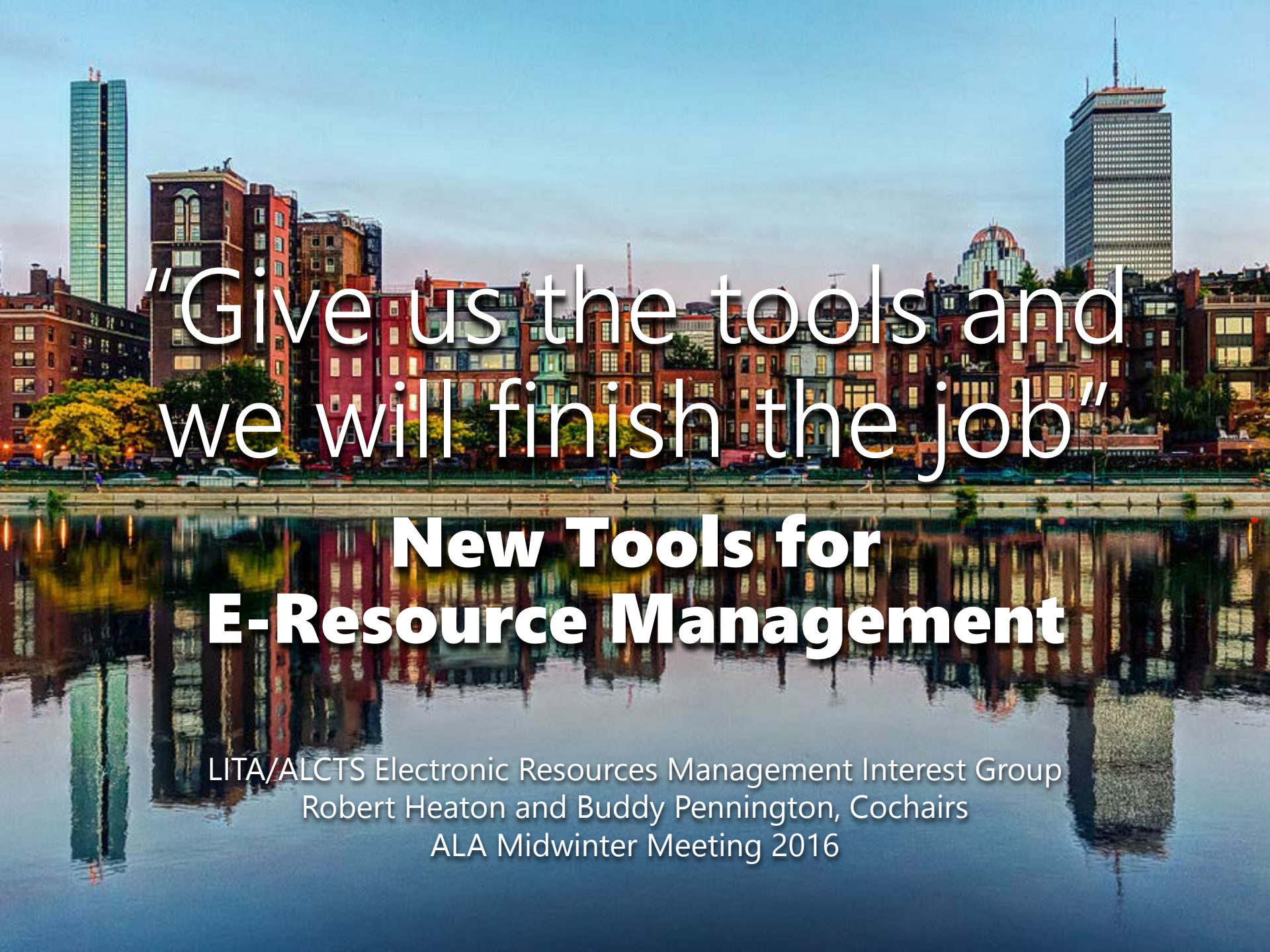


"Give us the tools and we will finish the job"

New Tools for E-Resource Management

LITA/ALCTS Electronic Resources Management Interest Group
Robert Heaton and Buddy Pennington, Cochairs
ALA Midwinter Meeting 2016

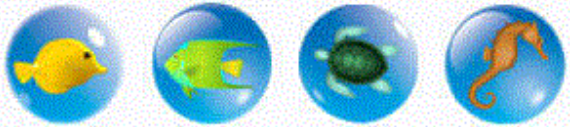
UMassAmherstLibraries

CORAL Workflows for New Acquisitions and Renewals

Christine N. Turner
Electronic Resources Librarian
cturner@library.umass.edu
ALA Midwinter – Boston
January 10, 2016

coral-erm.org/about/

CORAL



HOME ABOUT DOWNLOAD DOCUMENTATION GO TO LIVE DEMO!

› About

About CORAL

Centralized Online Resources Acquisitions and Licensing

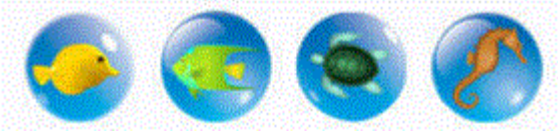
CORAL is an electronic resource management system built by the University of Notre Dame's Hesburgh Libraries. The first module, Licensing, was released as open source software in the summer of 2010 and we have continued releasing new modules since then. It is designed to be both simple and highly customizable – each module can be installed independently or used together depending on your library's needs. If you do decide to install the entire suite, easy access to linked records help make sense of the electronic resource through the entire life cycle:

Acquisition › Licensing › Administration › Support › Usage

CORAL runs on PHP 5, MySQL 5 and your webserver. It is a very small installation and most users (including Notre Dame) have it installed on a server alongside other production applications. CORAL is released as open source software under GPL v. 3 and is available on GitHub. While we are quite happy with the CORAL product for ourselves, we are always open to project contributors. If you have a great idea for CORAL please post it in the forum – we would love to hear about it!

APACHE php MySQL

Rationale for Adoption



- Integrated modules for organizations, resources, licenses and usage data
- Centralized repository for interrelated data previously distributed…widely among files, platforms
- Focus here on workflows in Resources module, not entire e-resources management system

Why Workflows?

- Opaque, disjointed processes for acquiring and renewing resources
- Scattered responsibilities for tasks among acquisitions staff
- Timely access to new resources provided inconsistently
- Needed better support for renewal decisions

How Workflows Work

CORAL Resources

Home | New Resource | My Queue | Import | Admin

Administration

- Users
- **Workflow / User Group**
- Access Method
- Account Type
- Acquisition Type
- Administering Site
- Alert Settings
- Alias Type
- Attachment Type
- Authentication Type
- Authorized Site
- Cataloging Status
- CatalogingType
- Contact Role
- Cost Details
- Currency
- License Status
- Note Type
- Order Type
- Purchasing Site
- Resource Format
- Resource Type
- Storage Location
- Subjects
- User Limit

Workflow Setup

Acquisition Type	Resource Format	Resource Type
Purchase	Electronic	database
Renewal	Electronic	database
Purchase	Electronic	ejournal package
Renewal	Electronic	ejournal package
Purchase	Electronic	ebook package
Renewal	Electronic	ebook package
Purchase	Electronic	image
Renewal	Electronic	image
Purchase	Electronic	streaming file
Renewal	Electronic	streaming file
Membership	Electronic	database
Membership	Electronic	any
Membership	Electronic	ejournal package
Multi-year renewal, payment only	Electronic	any
Access Fee	Electronic	any
Multi-year renewal, payment only	Electronic	ejournal package
Renewal	Electronic	ebook
Purchase	Electronic	ebook
Renewal	Electronic	tool
Trial	Electronic	any

add workflow

Database Purchase

CORAL Resources

Hello, Christine Turner
logout

Home | New Resource | My Queue | Import | Admin | Change Module

Library of Latin Texts Complete

- Product
- Acquisitions
- Access
- Cataloging
- Contacts
- Accounts
- Attachments (0 records)
- Routing

Step	Group	Start Date	Complete
Funding Approval	Scott	09/25/2015	10/06/2015 by Christine Turner
Licensing	Christine	09/25/2015	10/06/2015 by Christine Turner
Add bib/order records	Christine	10/06/2015	10/06/2015 by Christine Turner
Place order	Christine	10/06/2015	10/06/2015 by Christine Turner
Invoice payment	Heather	10/06/2015	11/24/2015 by Heather Deirdre
Access notification received	Christine	10/06/2015	mark complete
Activation - EZProxy	Christine		
Activation - SFX	Catherine		
Activation - catalog	Christine		
MARC record review	Marcelle		
Activation - WCL KB	Ron		
Activation - website/Collections & DBs	Christine		
Add MARC records for database titles	Christine		
Notification - selectors	Christine		
Notification - social media	Christine		
Acquisition type change, if needed	Christine		

- restart workflow
- mark entire workflow complete

E-Journal Package Renewal

CORAL Resources

Hello, Christine Turner
logout

Home | New Resource | My Queue | Import | Admin | Change Module

IOPScience Extra

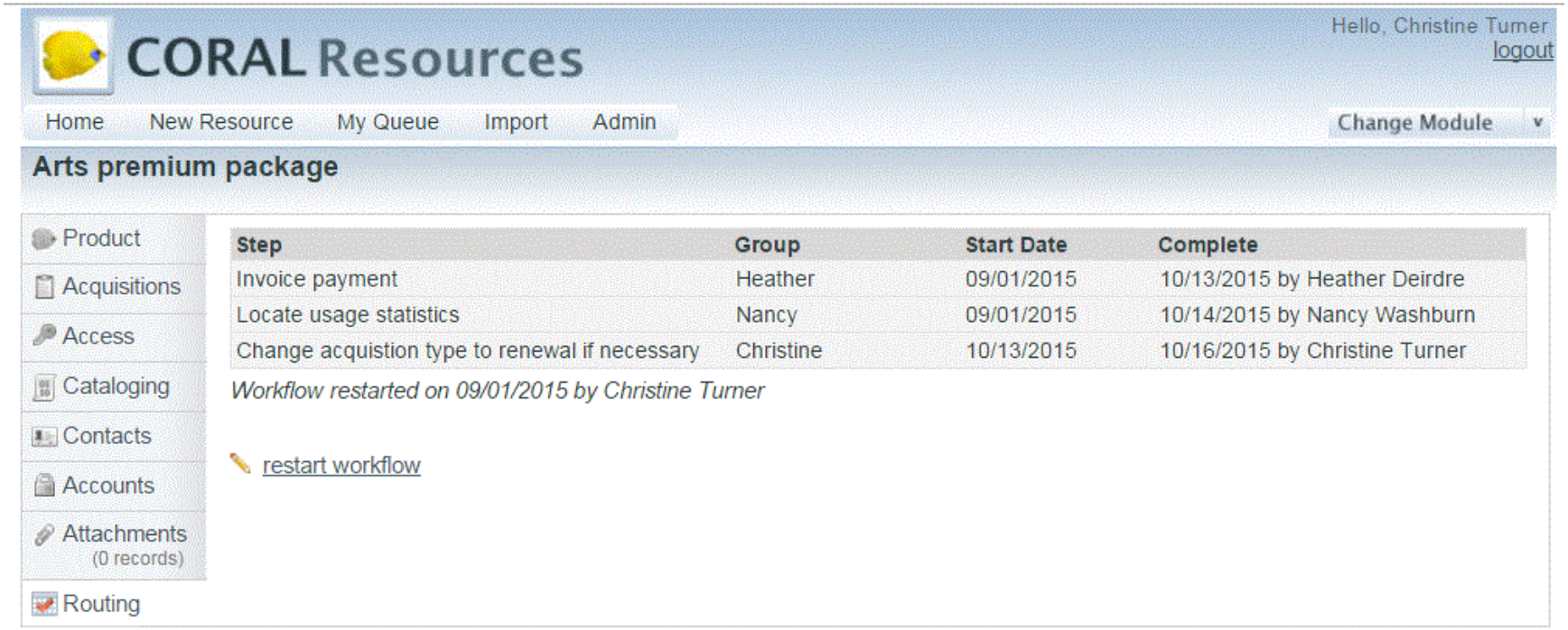
- Product
- Acquisitions
- Access
- Cataloging
- Contacts
- Accounts
- Attachments (2 records)
- Routing

Step	Group	Start Date	Complete
Locate usage statistics	Nancy	09/17/2015	09/28/2015 by Nancy Washburn
Send price, usage to selector w/6% > if firm price N/A	Nancy	09/17/2015	09/28/2015 by Nancy Washburn
Renewal price requested	Heather	09/17/2015	09/24/2015 by Heather Deirdre
Renewal price received	Heather	09/17/2015	09/24/2015 by Heather Deirdre
Title list download & review for changes	Christine	09/24/2015	10/08/2015 by Christine Turner
Licensing	Christine	09/24/2015	10/07/2015 by Christine Turner
Renewal confirmation	Heather	10/08/2015	10/08/2015 by Christine Turner
Invoice Payment	Heather	10/08/2015	10/30/2015 by Heather Deirdre
Activation review - SFX	Catherine	10/08/2015	mark complete

Workflow restarted on 09/17/2015 by Christine Turner

- restart workflow
- mark entire workflow complete

Multi-year Renewal, Payment Only



Degree of Difficulty

- Cost – free = easy
- Technical - ?
  - Reportedly easy, good support network
  - Our guy is good (and very pleasant)
- Personnel
  - Conceptual challenges
  - Customizing processes
  - Practical approaches

Meeting Our Needs?

- as a central repository for data – YES
- to make transparent workflows that trigger task for responsible staff in timely manner - Mostly.
- as tool to support renewal decisions...To a point, but we need more data and awareness (adoption)
- Still a work in progress. Next up: individual e-journal subscriptions

Electronic Resources Management with Trello

January 10, 2016
ALA Midwinter
Boston

SWARTHMORE

Jessica Brangiel
jbrangi1@swarthmore.edu

Trello

Free visual project management tool

Web based, simple download, Trello or Google account required

https://trello.com/

- No IT support needed
- Accessible from mobile devices
- Integrates with Google Apps

My Boards

- 2016 E Journal Changes
- Assessment Committee
- Online access set up
- Welcome Board

Electronic Resources

Boards | Members | Settings

- Databases
- E- continuations by publisher
- Electronic Journal Packages
- Electronic Journals post cancellation details for cancelled titles

Boards

Trello

JB Jessica Brangiel

Databases

Electronic Resources

Team Visible

Show Menu

Proquest

- Biological Sciences
- Ethnic Newswatch
- Gender Watch
- International Index to Music Periodicals (1)
- International index to the performing arts
- Literature Online (LION)
- Periodicals Index Online (PIO)

Add a card...

EBSCO

- Admin_Contact
- ABSEES (Feb 29)
- America History & Life
- Historical Abstracts
- ATLA religion & ATLAS
- AP Images

Add a card...

WALDO

- CQ Library
- HAPI (Hispanic American Periodicals Index)
- LexisNexis
- Oxford Art Online
- Oxford English Dictionary
- Oxford Music Online (aka Grove Music Online)
- ProQuest Congressional

Add a card...

PALCI

- MathSciNet
- Ethnic Newswatch
- Gender Watch

Add a card...

Oberlin Group

- Bibliography of Asian studies (Sep 30)
- Web of Science
- BioOne & BioOne 2

Add a card...

Show Menu

Oberlin Group

Bibliography of Asian studies
Sep 30

Web of Science

BioOne & BioOne 2

Add a card...

Bibliography of Asian studies in list Oberlin Group

Due Date

Sep 30 at 12:00 PM

Description

subscription runs October 1 - Sept 30th.
#o4591495
#wesleyan university library

Save

Formatting help

Add Comment

JB

Write a comment...

Save Comment

Activity

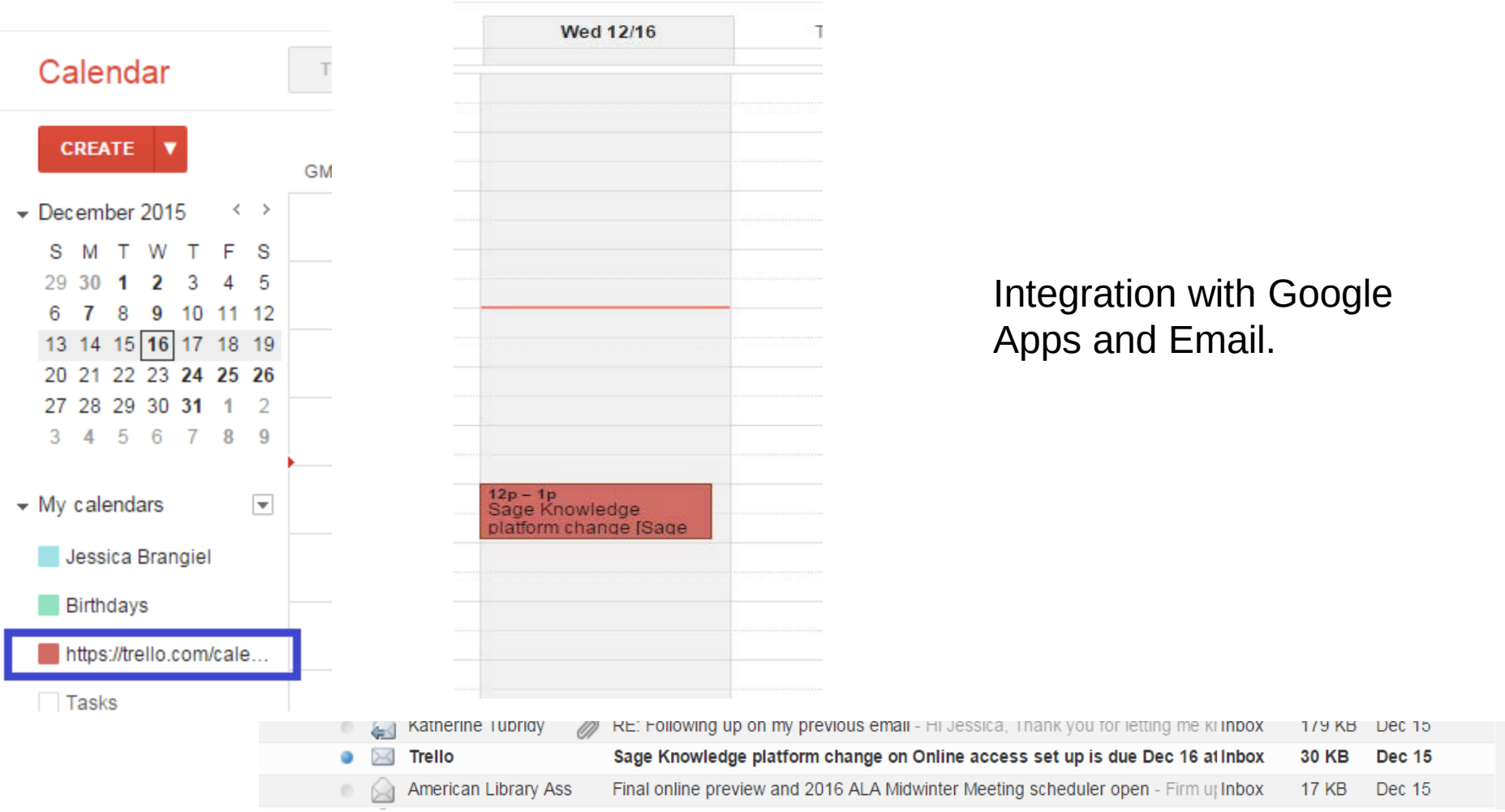
Add

- Members
- Labels
- Checklist
- Due Date
- Attachment

Actions

- Move
- Copy
- Subscribe
- Archive

Share and more...



Integration with Google Apps and Email.

Thank you!

jbrangi1@swarthmore.edu

USING GOOGLE APPS AS AN ERM

(OR AN ERM SUPPLEMENT)

Elsa Anderson, MLIS
Deputy Director, Collections
Icahn School of Medicine at Mount Sinai
elsa.anderson@mssm.edu

USING GOOGLE APPS AS AN ERM

- Google Apps suite, particularly Mail, Sheets, Calendar and Docs
- It is available for free online
- For greater security, we did not move forward until an institutional Google Apps license was purchased

LIBRARY SITUATION

- WMS ILS system
- Serials Solutions 360 Link Resolver
- LibGuides 2.0
- Shared drive for documents and title lists
- Wiki with ERM admin notes
- 4 staff members in the department, 1 librarian
- 150,000 e-books, 75,000 e-journals, 18,000 print items

1 MAJOR WEAKNESS: COMMUNICATION

- Never implemented task management or alerts in ERM
- New packages and title updates in the catalog and the link resolver
- Workflow to update titles and new packages poorly defined
- Inconsistent assignment and follow up on package and title updates
- Multiple people involved in licensing and in ERM tasks led to lack of communication and no prioritization

MAIN ITEMS: GOOGLE SHEETS

- To Do List, created from template
  - Tracks tasks, staff member, started and completed, and includes links to title lists
- ERM Admin list
  - Administrative information for resources
- Statistics Tracking
- Invoice Payment Tracking

TO DO LIST

To-do list

File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive

Date Due

TO DO

9/21 completed

✓	Date Started	Date Due	Date Completed	Done by	URL	Notes	Task
✓	~~12/3/2015~~		~~12/14/2015~~	~~Terrell~~	~~http://ebooks.iospress.nl/Publisher/Faq#~~		~~Create a KBart file for IOS Press Studies in Health Information Technology; upload~~
	12/11/2015			Elsa			AHA eBooks subscription added to proxy
✓	~~12/11/2015~~		~~12/16/2015~~	~~Peter~~			~~Update ERM Admin list; check passwords and change email address to libraryresources@mssm.edu~~
✓	~~12/14/2015~~		~~12/18/2015~~	~~Peter~~			~~Check Ebsco databases list in WMS and Serials Solutions~~
	12/14/2015			Terrell	https://docs.google.com/spreadsheets/d/		Update R2 holdings in WMS and Serials Solutions
	12/21/2015			Gregg	https://drive.google.com/a/mssm.edu/file		ISPG titles - access and Serials Solutions for MSHS
	12/21/2015			Terrell	http://ahainst.ipublishcentral.com/	Title list is strange, ask if you need help	AHA eBOoks subscription added to Serials Solutions
	12/21/2015			Terrell	http://ahainst.ipublishcentral.com/	Title list is strange, ask if you need help	AHA eBooks subscription added to WMS
	12/28/2015			Elsa	http://libguides.mssm.edu/ejournals_specialdirections		Update special directions E-Journals page
	1/4/2016			Peter	https://docs.google.com/a/mssm.edu/sp		Ebsco E-Journals Annual Update project

ERM ADMIN

ERM Admin

File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive

	A	B	C	D	E	F	G
1	**Resource Name**	**Publisher**	**Shared with**	**Invoiced by**	**Licensed by**	**Item type**	**Local Admin**
2	ABMS	Elsevier	HSL		Publisher	Database	Elsa
3	AccessAnesthesiology	McGraw-Hill Education	HSL		Publisher	Ebooks	Laura
4	AccessEmergencyMedicine	McGraw-Hill Education	HSL		Publisher	Ebooks	Laura
5	AccessMedicine	McGraw-Hill Education	HSL		Publisher	Ebooks	Laura
6	AccessPediatrics	McGraw-Hill Education	HSL		Publisher	Ebooks	Laura
7	AccessScience	McGraw-Hill Education	NYU		Waldo	Ebooks	Elsa
8	AccessSurgery	McGraw-Hill Education	HSL		Publisher	Ebooks	Laura
9	ACM Digital Library	NERL	NYU	NERL	NERL	Ebooks	Elsa
10	Alt Healthwatch	Ebsco	NYU	Ebsco	Publisher	Database	Elsa

ERM Admin

File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive

	A	B	C	D	E	F	G	J	K	L	M	N
1	**Resource Name**	**Publisher**	**Shared with**	**Invoiced by**	**Licensed by**	**Item type**	**Local Admin**	**Administrator URL**	**Username**	**Password**	**Account Number**	**Notes**
2	ABMS	Elsevier	HSL		Publisher	Database	Elsa					

STATISTICS

	A	B	C	D	E	F	G	H	I	J
1	Digital Periodicals Access by tit	January	February	March	April	May	June	July	August	September
2	Linkout	5960	4551	5653	6134	6278	5017	5835	5988	5844
3	Serials Solutions Clickthrough	27482	26679	28322	26982	23903	25721	24969	23339	22098
4	Total	33442	31230	33975	33116	30181	30738	30804	29327	27942
5										
6										
7										
8	Library Database Searches	January	February	March	April	May	June	July	August	September
9	UpToDate	51722	57742	61475	68244	64740	52708	64779	64139	62251
10	Ebsco	8768	8895	9622	11548	8636	6752	8740	6448	9316
11	ProQuest	5511	6078	6246	5362	6129	4386	5684	2496	1509
12	ClinicalKey									
13	Web of Science	4738	3892	4351	4079	4017	3899	3053	3255	3718
14	Scopus	1618	1311	1455	2328	2967	1231	1340	1436	1204
15	Ovid	5687	3543	6393	5398	5875	4560	4742	5120	5030
16	VisualDX									
17	Total	85503	88633	97586	104339	100013	73536	88338	82894	83028
18										
19										
20	Catalog Searches	1,853	2991	2581	2356	2153	3218	3891	3422	2873
21	Catalog Page views	6,805	9922	9512	7481	7220	14312	14109	15166	15470
22										
23										

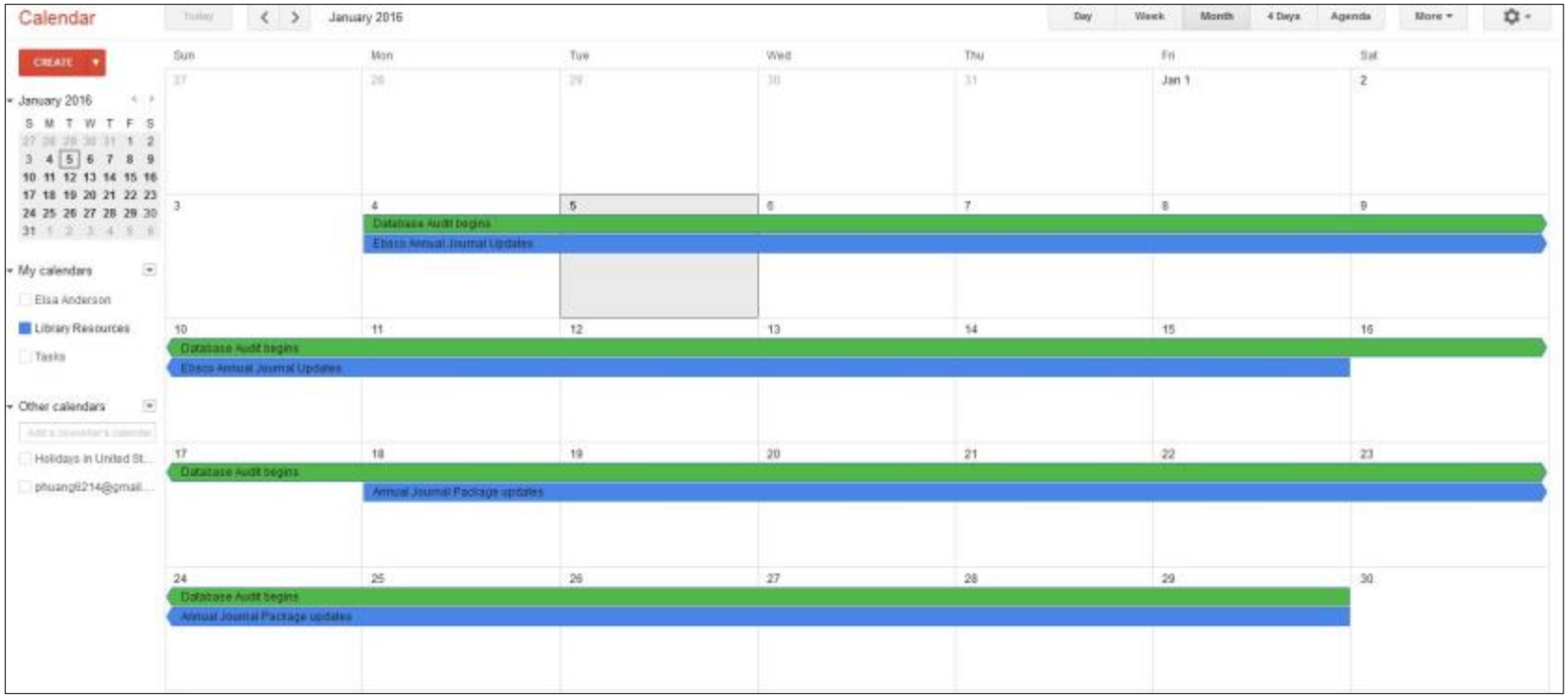
INVOICE TRACKING

A	B	C	D	E
Resource Name	Publisher	Paid To	Invoice Date	Invoice Number
ProQuest & Serials Solutions	ProQuest	Waldo	12/5/2015	34675
ISPG North America Collection	ISPG	Ebsco	12/11/2015	9185399
NYU - NERL Annual	NERL	NYU	12/11/2015	1046
NYU - ACS, NERL BMJ, Alt Health	NERL	NYU	12/1/2015	1045
Can J. Gastro	Ebsco	Ebsco	12/13/2015	0082510
Cold Spring Harbor Journals	CSH Press	CSH Press	8/19/2015	20169821
AHA Guide to the Health Care Fiedl	Continuation	YBP	12/11/2015	431967

ALSO: DRIVE AND GCAL

- Google Sheets and Google Drive are a great place to load or link title lists
  - Doesn't take up space on local drives, all lists are kept together, manages versioning problems
- GCal is also very useful
  - Helps to schedule yearly tasks and provide reminders of projects coming up

GOOGLE CALENDAR



ADVANTAGES

- Available off campus
- Allows multiple simultaneous editors
- Eliminates version problems, no read only spreadsheets
- Password protected
- Easy to control access to sensitive information

IMPLEMENTATION

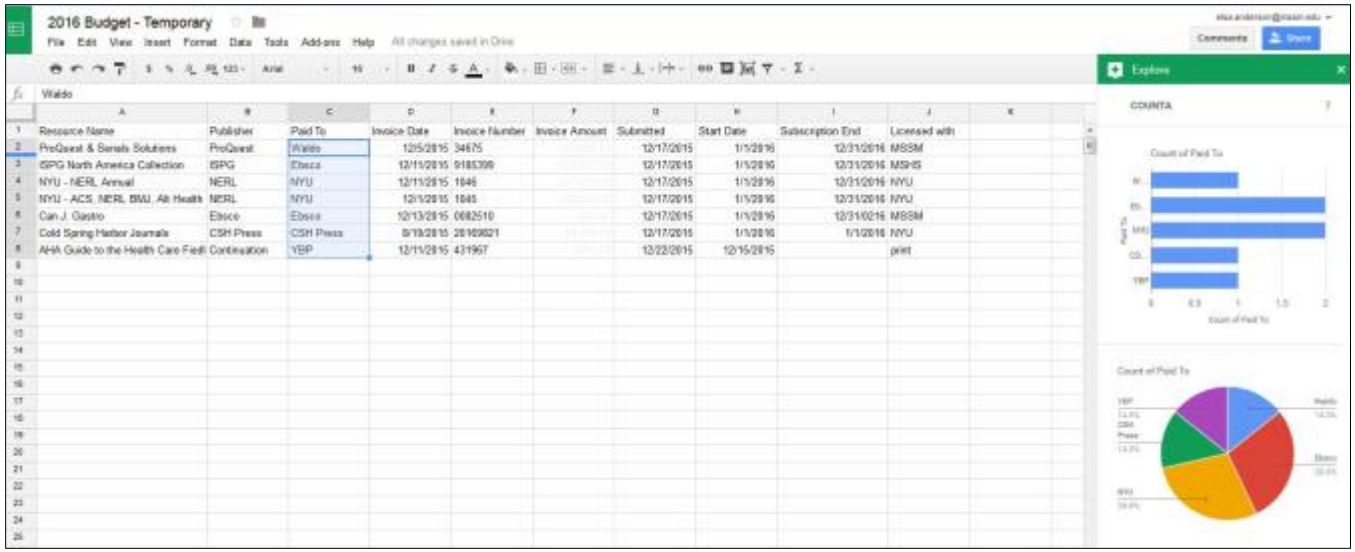
- Cost: $0 to the library, $someamount to the institution
- Personnel: learned the system very quickly, as they are used to Google and to spreadsheets
  - Getting all staff logins to the institutional Google Apps was the hard part
- Technically: simple to implement. Required a few days to implement fully
  - This is a small department and staff were excited about the new process. Your mileage may vary.

DOES IT WORK?

- So far: YES!
- Great as a manager, when surprise tasks come in can easily add them to the to do list
- More efficient: staff aren't waiting for me to set up projects, delegate and train, and follow up
- Staff feedback:

FUTURE PLANS

- Explore budget analysis tools in greater detail
- Expand statistics collection and tracking
- Schedule monthly projects to make workflow processes more clear



OTHER LIBRARIES ON GOOGLE AS A TOOL

- England, Lenore. "ERM Ideas and Innovations." *Journal of Electronic Resources Librarianship* 26 3 (2014): 193-202.
- Hartnett, Eric. "Using Google Apps through the Electronic Resource Life Cycle." *Collection Management* 37 1 (2012): 47-54.
- Jensen, Karen. "Managing Library Electronic Resources Using Google Sites." *Journal of Electronic Resources Librarianship* 25 2 (2013): 115-23.
- Murray, Adam. "Electronic Resource Management 2.0: Using Web 2.0 Technologies as Cost-Effective Alternatives to an Electronic Resource Management System." *Journal of Electronic Resources Librarianship* 20 3 (2008): 156-68.
- Rathemacher, Andree. "Serials Spoken Here: Reports of Conferences, Institutes, and Seminars." *Serials Review* 39 3 (2013): 202-05.
- Shapiro, Steven. "Using Google Calendar as an Email Alert System for Electronic Resource Renewals." *Journal of Library Innovation* 1 1 (2010): 52-56.

QUESTIONS?

Thank you!

University of Maryland University College

ALCTS/LITA Electronic Resources Management Interest Group Visio and JIVE

Lenore England, Assistant Director,
Electronic Resources Management
UMUC Library

lenore.england@umuc.edu
240-684-2030

Saturday, January 10, 2016
1-2:30 pm, EST

Visio and JIVE with ERM

Some rights reserved by foreverdigital

- Visio – Brainstorming
- JIVE – Get Organized

Visio

Some rights reserved by foreverdigital

- From Microsoft, 2010 Professional version
- Paid by UMUC (no cost to Library)
- No maintenance by Library

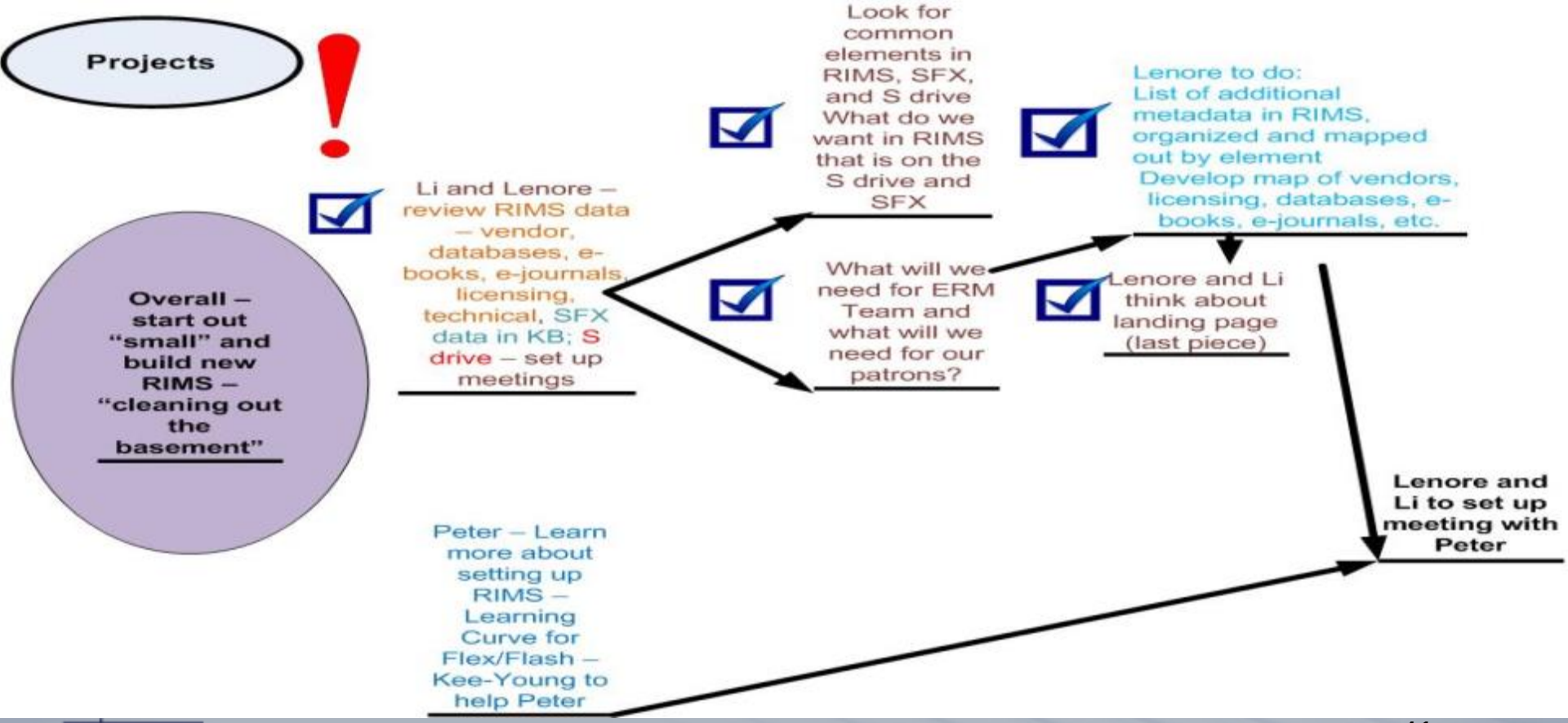
Visio

Some rights reserved by foreverdigital

- ERM staff needed to online tool to track brainstorming, project planning.

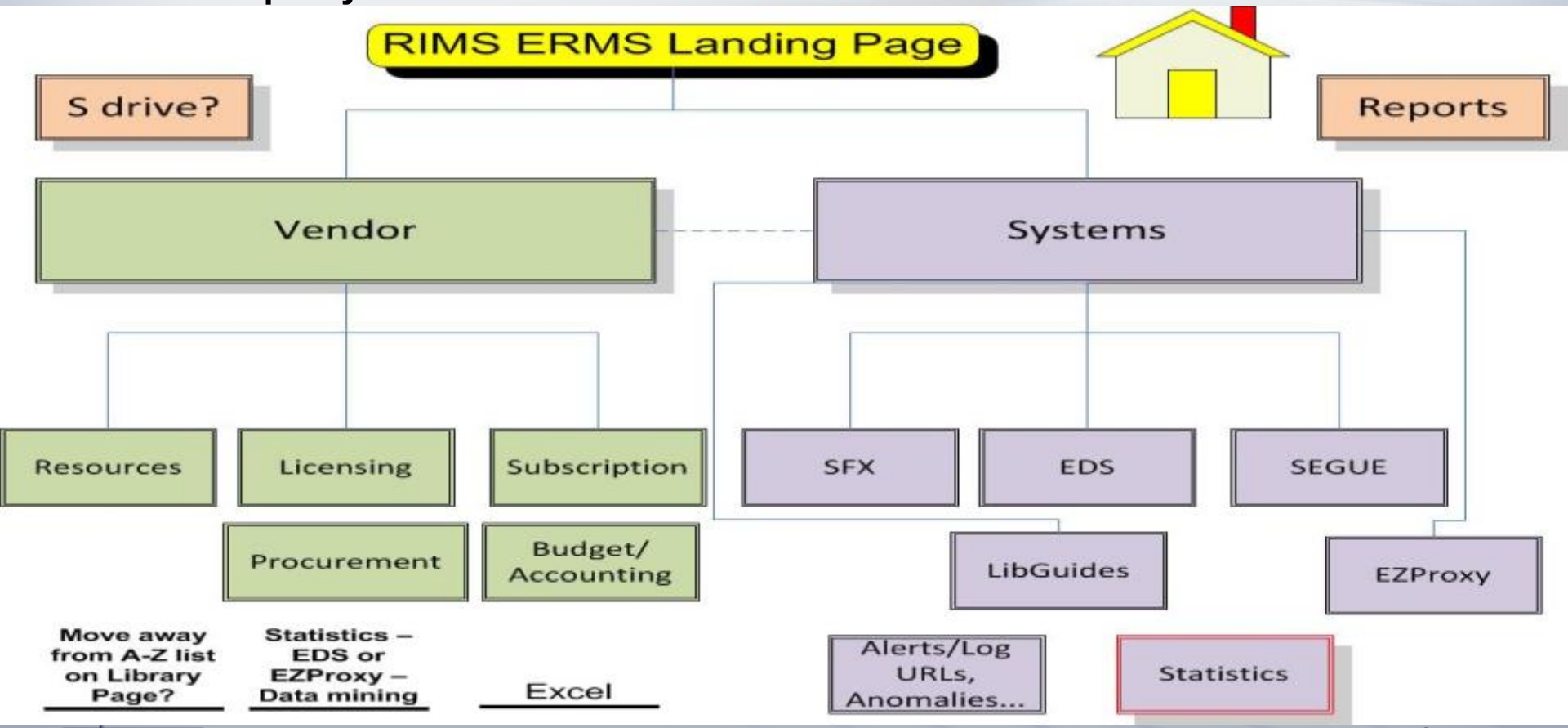
Visio

- Brainstorming – Chart example; early stages of planning for a project.



Visio

- Brainstorming – Chart example; final stages of planning for a project.



Visio

- Very easy to use.
- Works very well - repurposing as a planning tool.

JIVE

Some rights reserved by foreverdigital

- From JIVE Software
- Paid by UMUC (no cost to Library)
- No maintenance by Library

JIVE

Some rights reserved by foreverdigital

- ERM staff needed to online tool organize projects, workflows and communicate with UMUC.

JIVE

- Organize - Projects

ENGAGE

Administration | Academic Affairs | Analytics, Planning & Technology | Business Ops | Overseas & Military Ops | Strategic Enrollment Mgmt | Quick Links

Home | UMUC News | Content | People | Places | Apps | Help

E-Resources Management (ERM) Central, Library

in ILS Staff Only

Configure | Following in 1 stream

Overview | Content | People | Subspaces and Projects | Reports | Actions | About | Share | Manage

SPACE OVERVIEW

This space is for electronic resources management (ERM) and UMUC Library staff to engage in discussion about the electronic resources collections for the Library - everyone is welcome to comment. The site is also a space for ERM staff to coordinate and organinize ERM functions: acquisitions, operations, and maintence, as well as a location for other ERM endeavors.

Space Administrators:

SPACES

	Discussions	Documents	Blog Posts	Events	Polls	Videos	External Objects	Ideas
ERM Committees	0	0	0	0	0	0		
ERM Conferences	0	0	0	0	0	0		
ERM Tools	0	0	0	0	0	0		
ERMS - Electronic Resources Management System	0	0	0	0	0	0		
ERM Clearinghouse Project	0	0	1	0	0	0		
July 1 Transition, Annual	0	0	1	0	0	0		
ERM Publications	0	0	0	0	0	0		
ERM	0	0	0	0	0	0	0	0

ACTIONS

- Start a discussion
- Write a document
- Upload a file
- Write a blog post
- Create a poll
- Create a sub-space
- Create a project
- Create by email
- View feeds
- Create a video

TOP PARTICIPANTS

Soon you'll see the top participants here. Start collaborating with others to earn points and you just

JIVE

- Organize - Workflows

ENGAGE
Administration | Academic Affairs | Analytics, Planning & Technology | Business Ops | Overseas & Military Ops | Strategic Enrollment Mgmt | Quick Links

Home | UMUC News | Content | People | Places | Apps | Help

ERM Evaluation Central FY 2016
in ERM Evaluation Central Sites

Configure | Following in 1 stream

Activity | Content | People | Subspaces and Projects | Reports | Actions | About | Manage

ACTIONS
- Start a discussion
- Upload a file
- Write a document
- Write a blog post
- Create a poll
- Create a video

VIEW THE BLOG
ERM Evaluation Central FY 2016

All Content (3) | Blog Posts (0) | Documents (0) | Discussions (3) | Polls (0) | External (0) | Events (0) | Ideas (0) | Videos (0)

Filter by action: None | Filter by shared content

Type to filter by text | Filter by tag | Sort by latest activity: newest first

Title List Comparisons
Compare titles in LION and Project Muse. Send to Lindley. Summary Report, March 31, 2015; see attachments. Response on April 1, 2015 from Lindley: I believe in the e-resources...
last modified by Lenore England
0 1 0

2015 Evaluation Spreadsheet
The 2015 evaluation spreadsheet is located on the S drive: S:\Databases\Database Justifications\All_ERs_Compiled_201
created by Lenore England
0 1 0

Possible Electronic Resources Changes in FY 2016 ...
1. Adds - No Communication and Mass Media Complete (CMMC)" "Request from COMM program; graduate school not happy when we dropped. I will put CMMC in the queue to review for FY 2016/2017. We d...
last modified by Lenore England
0 1 0

Get a feed of this content | Use this view in a tile

JIVE

- Harder to use.
- Works very well - repurposing as an organizational tool.

Visio and JIVE with ERM

Questions - Brainstorming

Let's discuss… Later

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LibAnswers w/LibChat

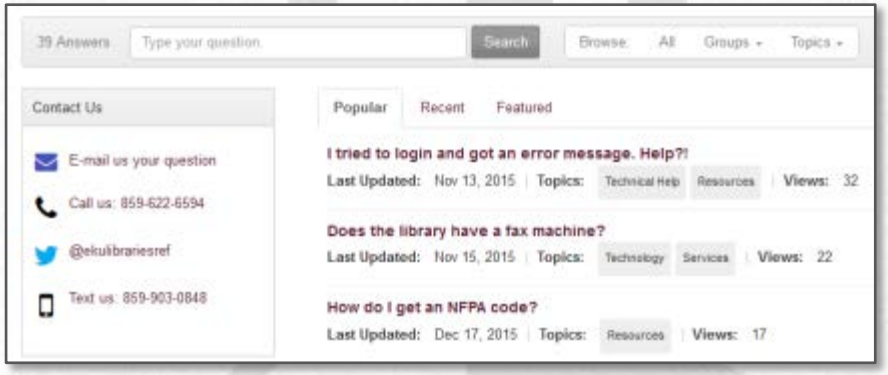
A Solution for eResource Ticketing and Workflow Management

Kelly Smith
Coordinator of Collections and Discovery
Eastern Kentucky University Libraries
kelly.smith2@eku.edu

About LibAnswers/LibChat

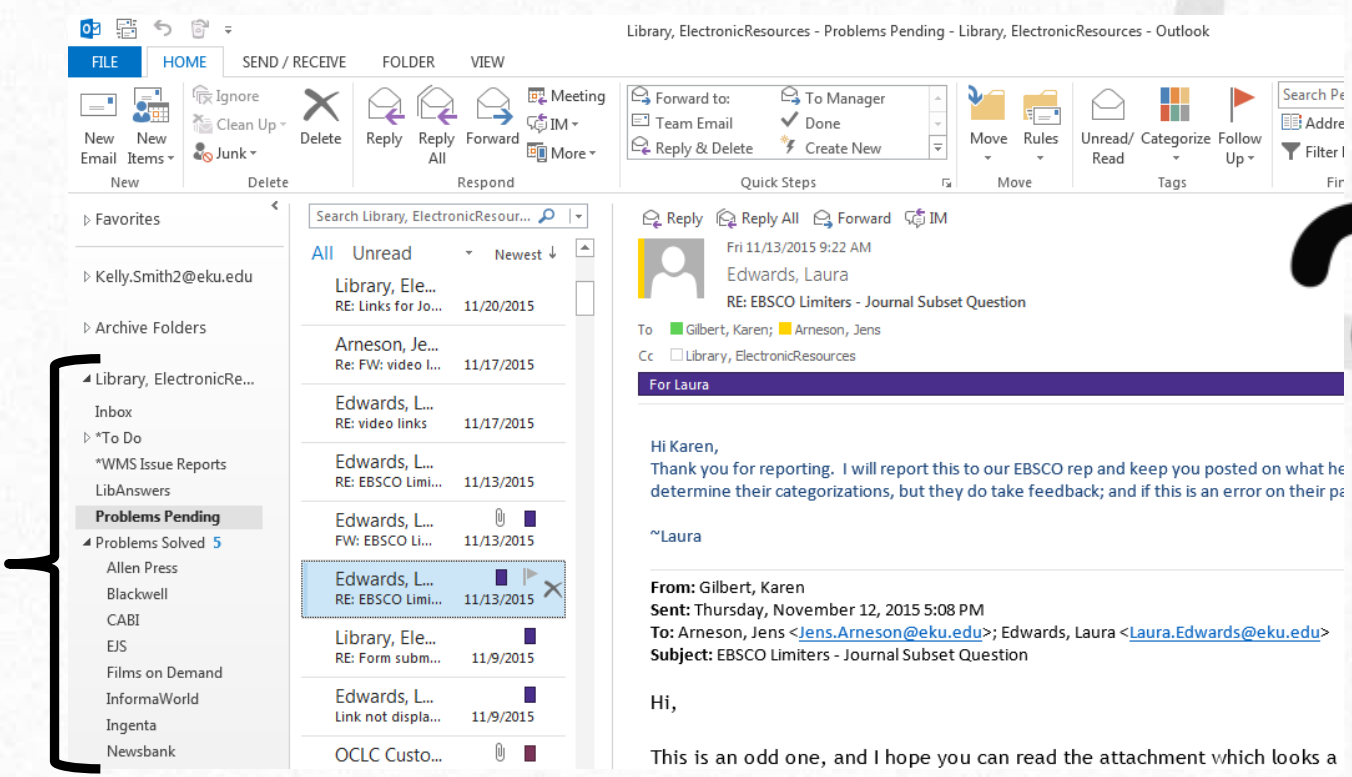
http://springshare.com/libanswers/

http://libanswers.eku.edu/

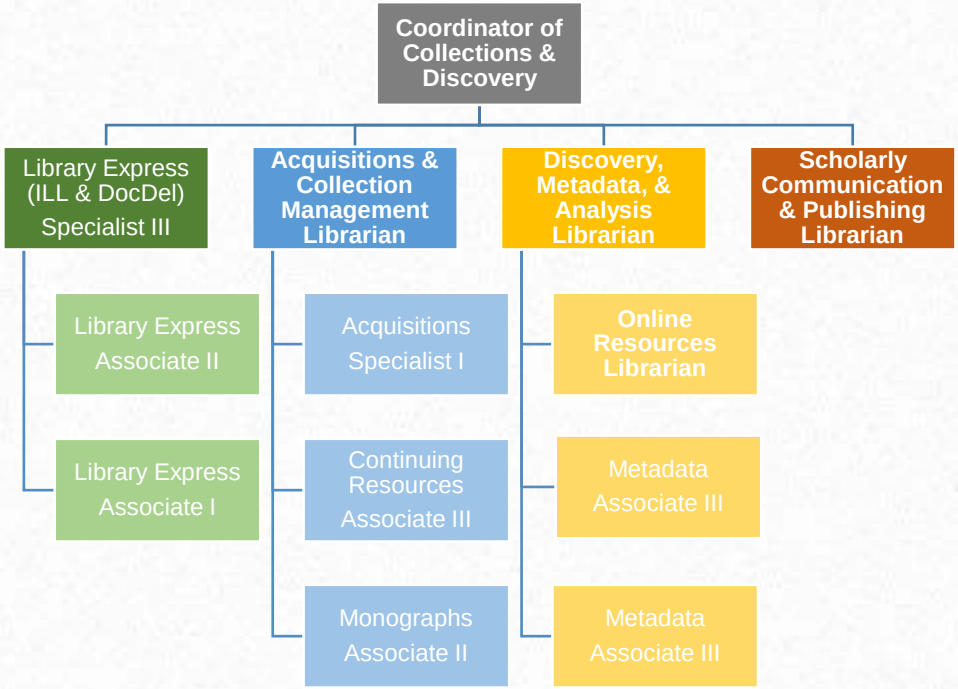


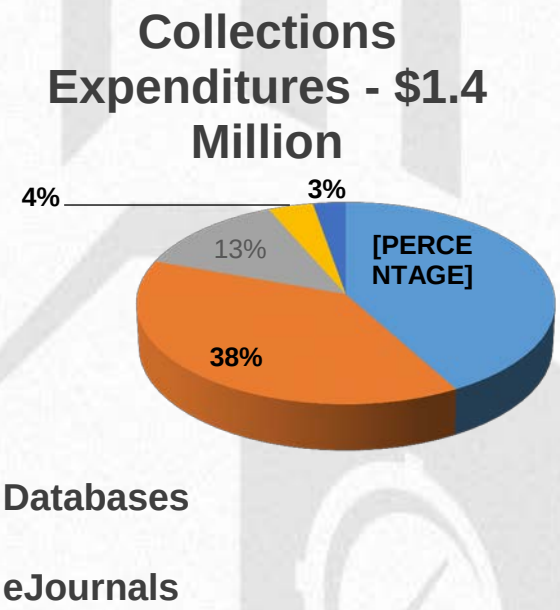
Consortial cost: $2,400/year + $99 per additional queue

Why did we need this tool?

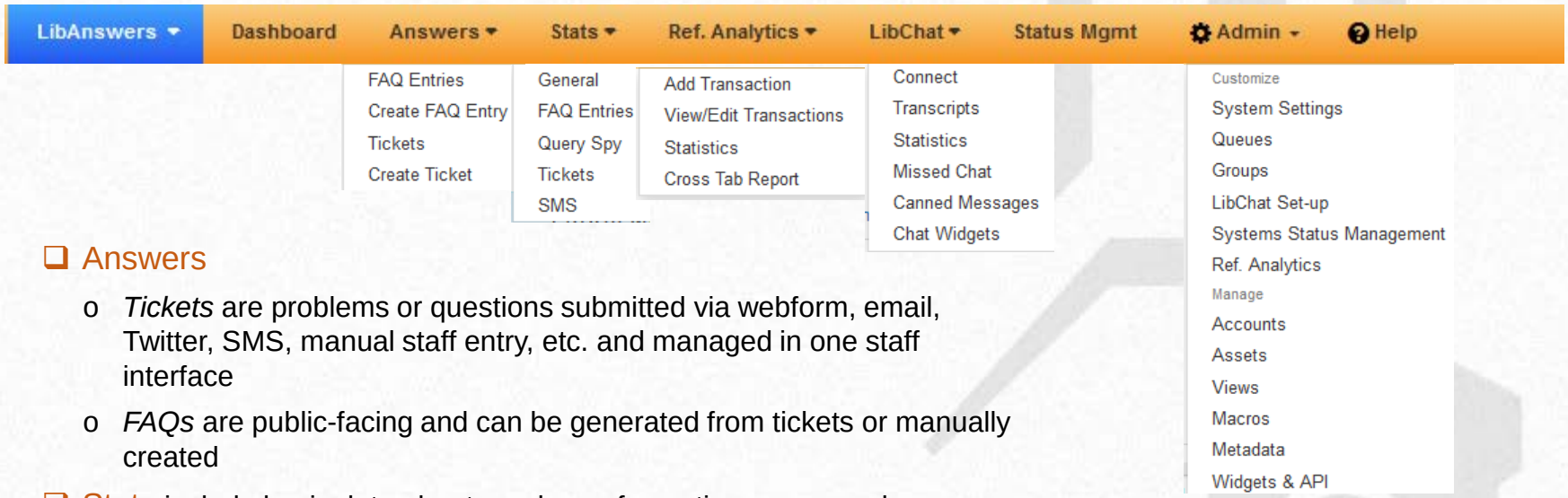


Why did we need this tool?



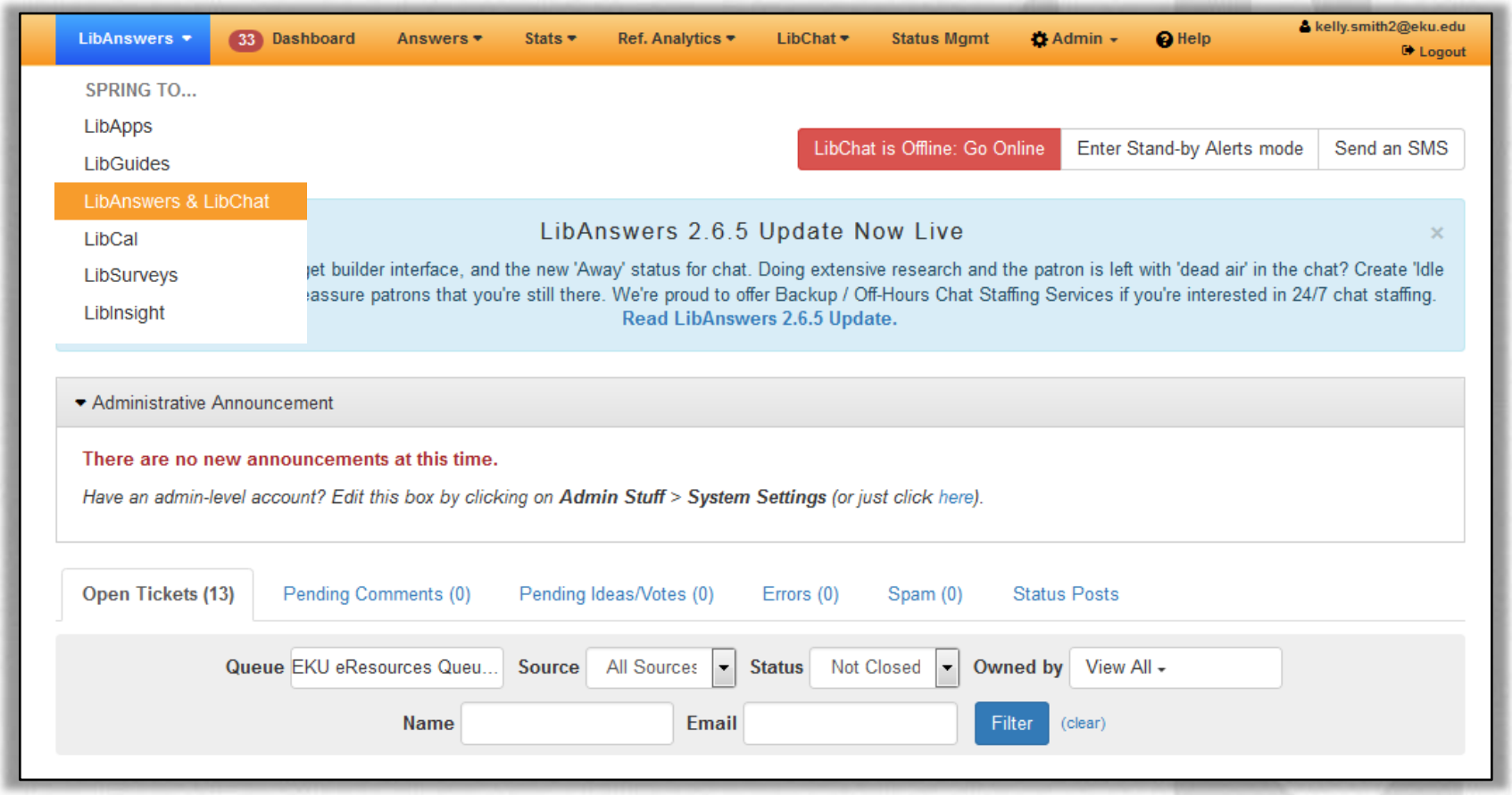


Under the hood… Dashboard



- Answers
  - *Tickets* are problems or questions submitted via webform, email, Twitter, SMS, manual staff entry, etc. and managed in one staff interface
  - *FAQs* are public-facing and can be generated from tickets or manually created
- Stats include basic data about numbers of questions answered
- Analytics are more customizable, based on locally defined metrics
- LibChat is the chat service provided with LibAnswers

Under the hood… Dashboard

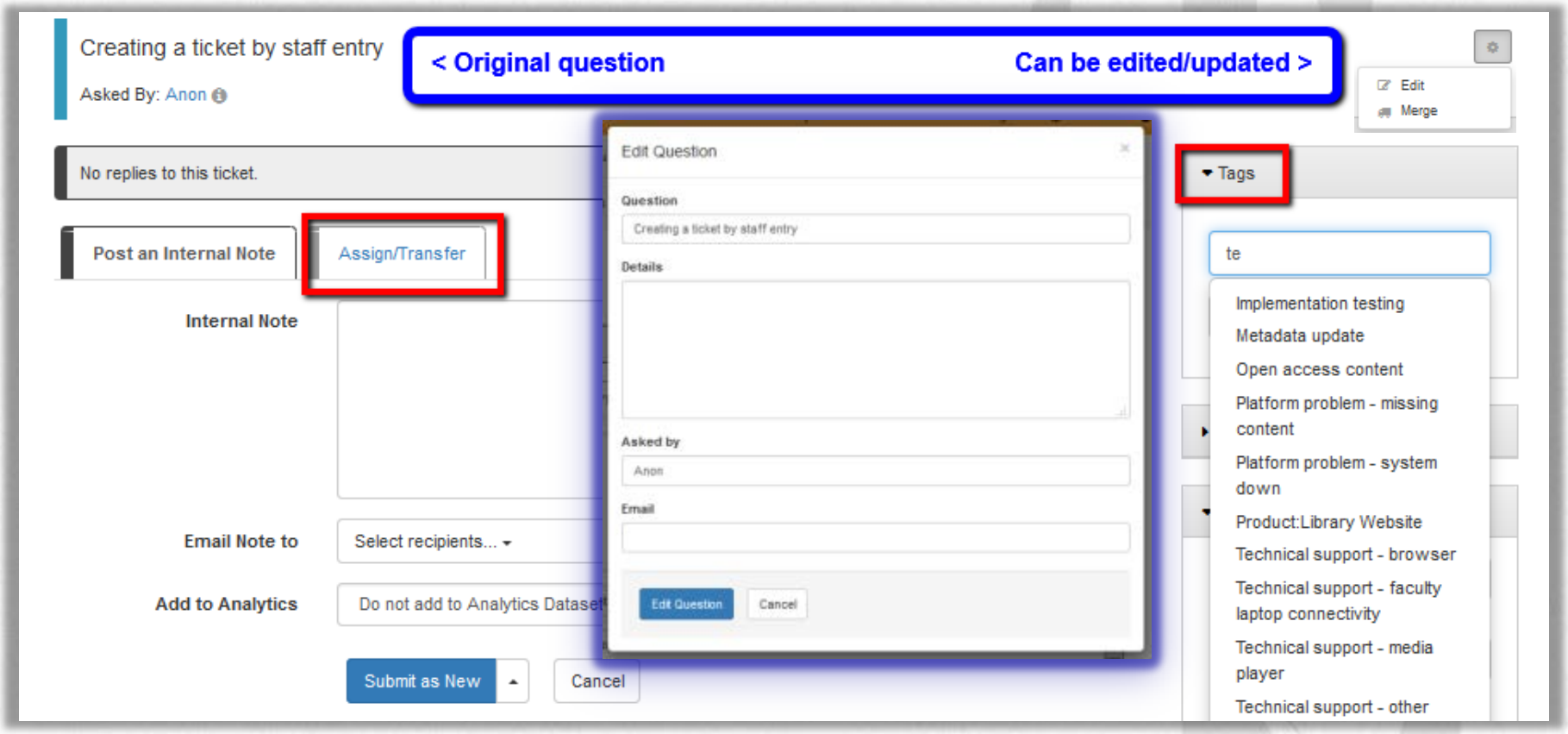


Under the hood… Dashboard

Tickets 1 - 12 (of 12)

Id	Status	Queue	Question	Last Message From	Owner	Updated
705822	New	EKU eResources Queue	University of Chicago Press Journals Kelly Asked via Staff Entry Subscription - change of pub/platform or title	Patron	Rebecca Stinnett	Jan 04 2016, 01:33pm
674686	Pending	EKU eResources Queue	Journal of Advanced Nursing record has links to unrelated journal Dermatology Nursing OCLC Support (support@oclc.org) Asked via Staff Entry Linking - Discovery Metadata update	User	Laura Edwards	Jan 04 2016, 01:31pm
683900	Open	EKU eResources Queue	Maney Publishing acquired by Taylor and Francis Jens Asked via Staff Entry Subscription - change of pub/platform or title	Patron	Jens Arneson	Jan 04 2016, 01:30pm
684423	Pending	EKU eResources Queue	Access Interruption to music in print Jens Asked via Staff Entry Awaiting Vendor Fix Product:Music in Print Series	Patron	Jens Arneson	Jan 04 2016, 01:30pm

Under the hood… Tickets



Under the hood… Tickets

Example Ticket screen capture – page 1

You have claimed this question.

QID: 674439 **Status:** Closed **Queue:** EKU eResources Queue **Owned by:** Kelly Smith Unclaim

Asked By: Kelly testing the chat feature (kellysmith72@gmail.com) **Asked On:** Nov 23 2015, 09:50am **Last Updated:** Jan 04, 2016 **Turnaround:** 10:23:45

Chat turned into a ticket

Need to create a canned message

09:48:25 **Kelly Smith:** Enter your EKU library credentials
09:48:55 **Kelly Smith:** There's more info at this page http://libanswers.eku.edu/faq/99195
09:49:06 **Kelly is testing the chat feature:** Cool! Thanks for the help
09:49:22 **Kelly Smith:** NP. Is there any other way I can help?
09:49:37 **Kelly is testing the chat feature:** No, I'm good. Thanks! Bye!

Asked By: Kelly testing the chat feature

Note from *Kelly Smith* (Nov 23 2015, 09:50am):

FAQ for logging in from off campus needs to be turned into a canned message

Tags

Implementation testing

Under the hood… Tickets

Example Ticket screen capture – page 2

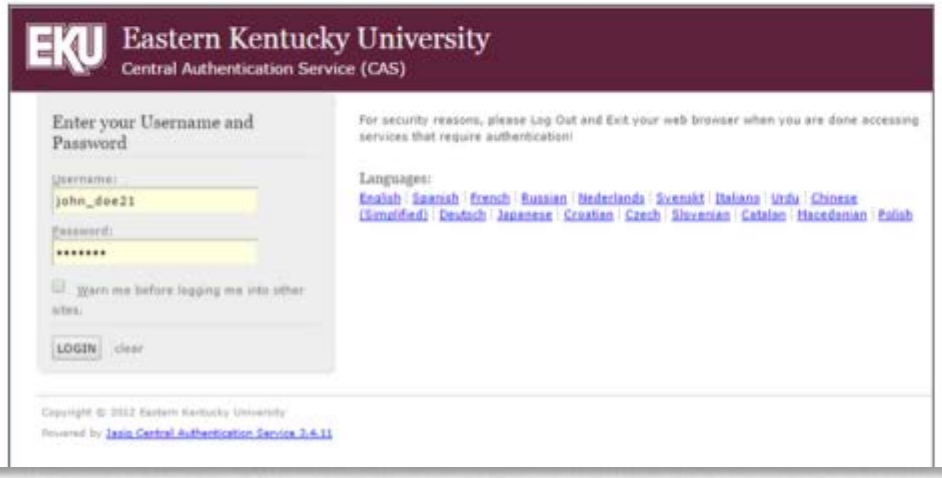
Note from *Kelly Smith* (Nov 23 2015, 09:51am):

follow up on this

[Status changed to *Pending*.]

Reply from *Laura Edwards* (Dec 04 2015, 09:35am):

When accessing the Libraries' databases and other online resources, you will be prompted to log in with your E-Key (EKU email) to make content available to you that is not free on the open web.



Technical support - other

Add Tag

Add

Reuse Answers

Recommendations from your system (FAQs) (10): hide

- #99285: I tried to login and got an error message. Help?! copy
- #99210: How do I create a persistent link to a library resource? copy
- #99437: How do I download an eBook? copy
- #102769: How do I log in to LearningExpress? copy
- #107597: Tips for managing a eResource troubleshooting ticket copy
- #105444: Problem

Under the hood… Tickets

Example Ticket screen capture – page 3

E-Key login examples:

- Student (john_doe21)
- Faculty/Staff (doej)

Once you login, you should be seamlessly connected to our online resources.

If your login does not work, first make sure you have entered your username correctly. Only use the first part of your email--do not include the domain part of your email address.

Correct: john_doe21

Incorrect: john_doe21@mymail.eku.edu

If you are entering your username correctly and still can't login, **contact IT** to make sure your E-Key information is up to date. If IT confirms that your login information is correct, and you are still having problems logging in, please **contact us** so we can troubleshoot this problem.

Emailed to: "Kelly testing the chat feature" <kellysmith72@gmail.com>, "Laura Edwards" <laura.edwards@eku.edu>

Note from *Laura Edwards* (Dec 04 2015, 09:37am):

Kelly - I created a macro "Logging in to Library Resources from Off-Campus". Copied and pasted from the FAQ to see how it looks on the patron side.

Emailed to: "Kelly Smith" <kelly.smith2@eku.edu>

Note from *Kelly Smith* (Jan 04 2016, 01:34pm):

[Queue Transfer from: EKU Reference Queue to EKU eResources Queue]

of Style **copy**

- #105245: What is my login for the library computers? **copy**
- #99447: I downloaded an eBook to my computer but I can't open it. Help?! **copy**
- #99237: How do I get an NFPA code? **copy**
- #99257: How do I find an ANSI standard? **copy**

Recommendations from your system (private) (8): show

Keyword | Search

Copy an Answer

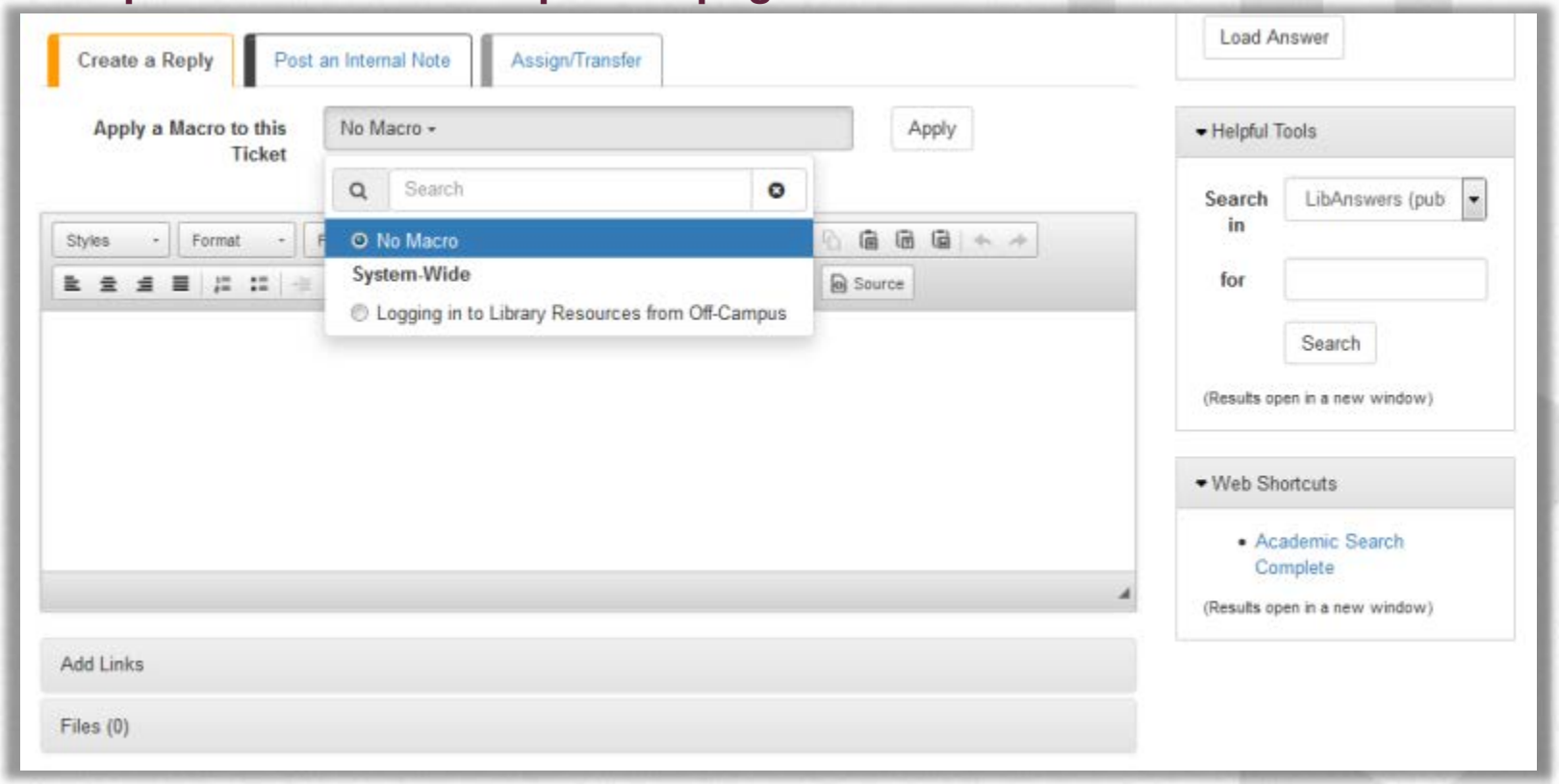
Question ID

FAQ Entry

Load Answer

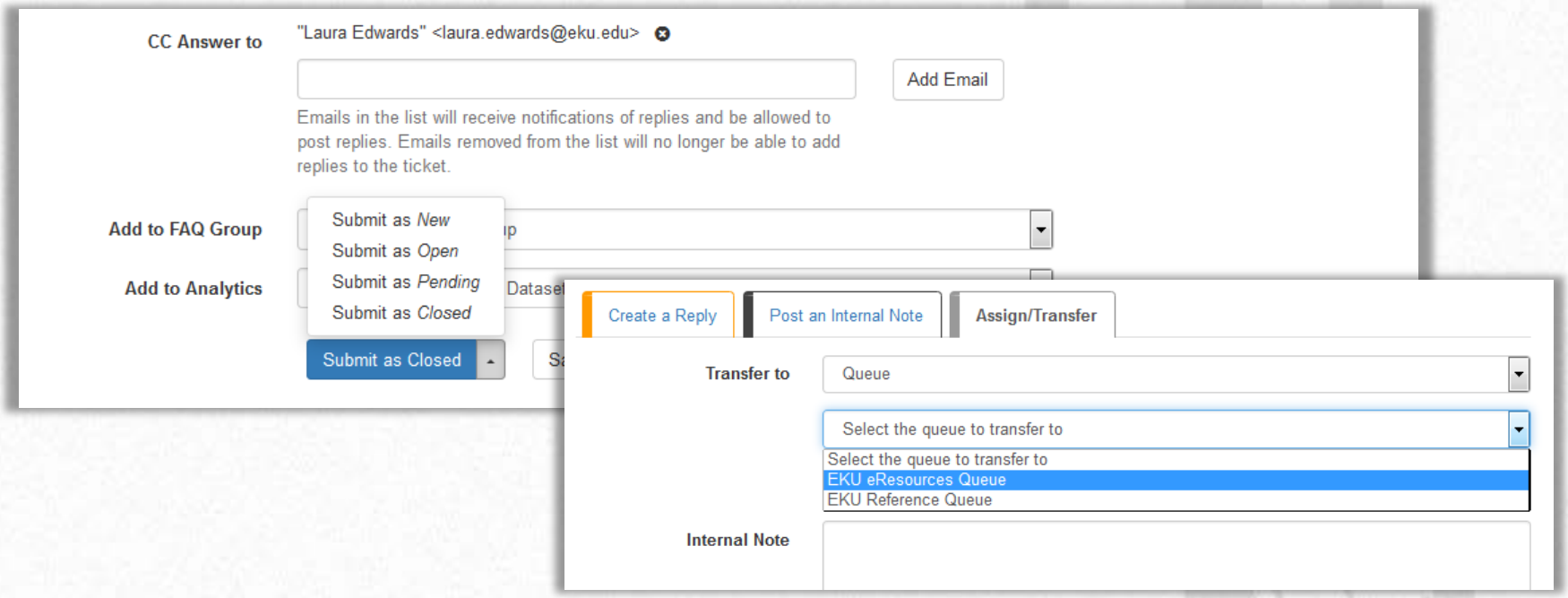
Under the hood… Tickets

Example Ticket screen capture – page 4

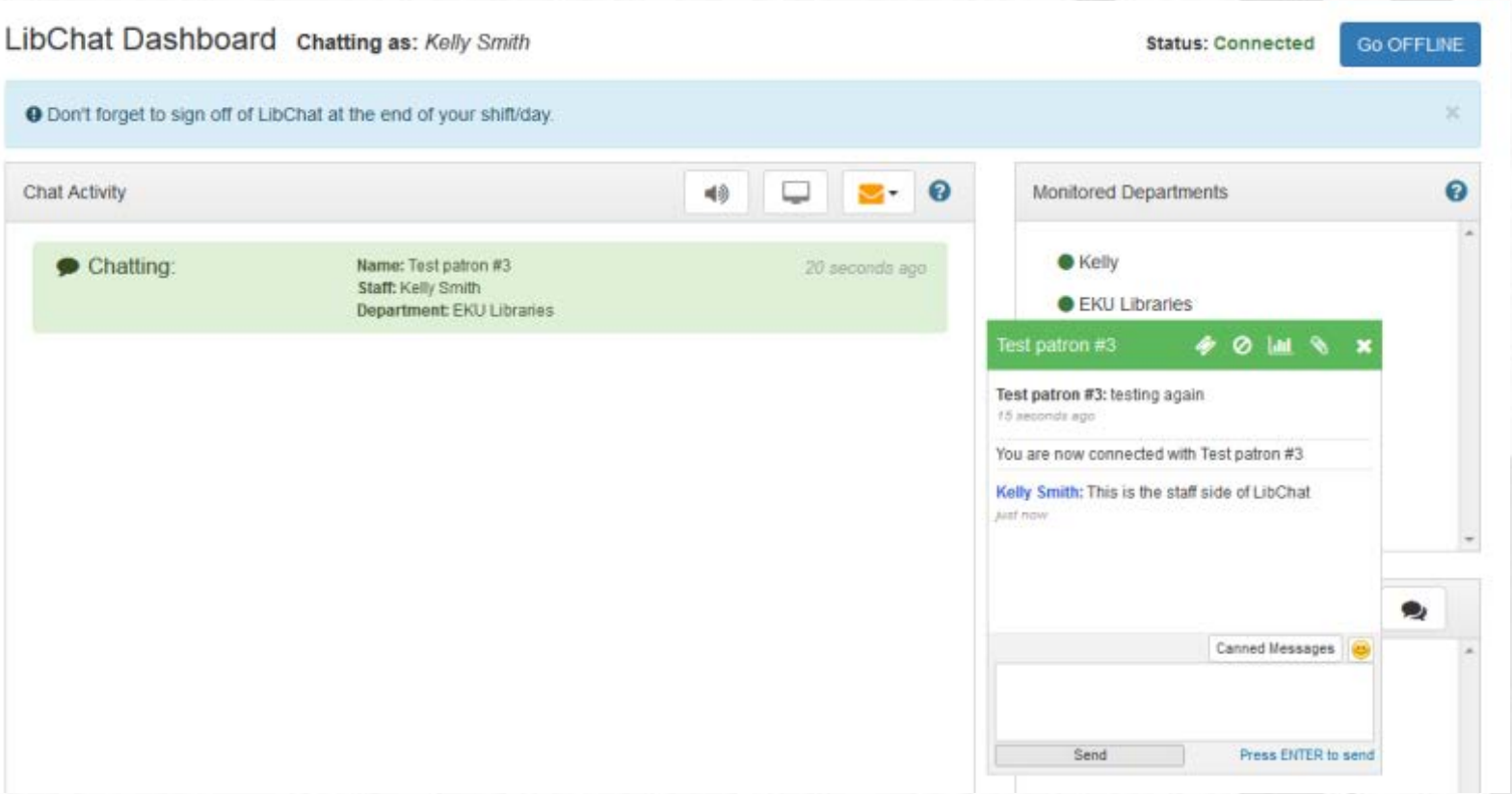


Under the hood… Tickets

Example Ticket screen capture – page 5



Under the hood… Chat



Under the hood… Chat

QID: 674367 **Status:** New **Owned by:** Kelly Smith Unclaim

Asked By: Kelly Testing (kelly.smith2@eku.edu) **Asked On:** Nov 23 2015, 09:16am **Last Updated:** Nov 23, 2015 **Turnaround:** 00:00:00

I'm generating a chat. Please ignore. I will delete later

09:14:17 **Kelly Smith:** Thanks for contacting us. I'm responding to your chat.
09:14:31 **This is Kelly:** Thanks for your help today.
09:14:48 **Kelly Smith:** Bye.

Asked By: Kelly Testing

This is a chat session that was turned into a ticket.

If an end user's issue cannot be resolved and needs follow up, this is a great way to manage that.

Chat history is included in the ticket.

Note from *Kelly Smith* (Nov 23 2015, 09:16am):

Generating a ticket from a chat

Create a Reply | Post an Internal Note | Assign/Transfer

Styles | Format | Font | Size | Source

Tags

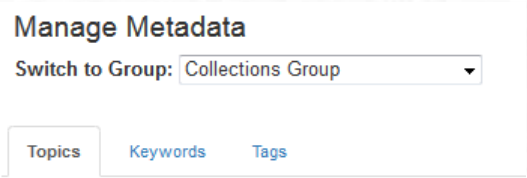
Implementation testing

Add Tag

Add

Reuse Answers

Under the hood… Analytics



EKU Reference Group Topics

For Distance Learners
For Faculty
Printing
Research Help
Resources
Services
Spaces
Technical Help
Technology

Collections (eResources) Group Topics

Discovery
Enhancement Request
EZProxy / Authentication Problem
Link Resolver
Metadata
OCLC System Outage
Subscription Problem
User Technical Issue
Vendor Platform Problem
Workflow Mangement

Tags - apply to all queues in system

* Urgent *
Awaiting Vendor Fix
Help - Directional
Help - Research
Implementation testing
IP / EZproxy
Linking - A to Z list
Linking - Discovery
Linking - link resolver
Metadata update
Open access content
Platform problem - access denied due to excessive downloading
Platform problem - incorrect metadata
Platform problem - missing content
Platform problem - system down
Subscription - activation needed
Subscription - canceled
Subscription - change of pub/platform or title
Subscription - coverage change
Subscription - lapsed
Technical support - browser
Technical support - faculty laptop connectivity
Technical support - media player
Technical support - other
Unresolved - problem cannot be duplicated
Unresolved - referred elsewhere
User error
Workflow - cancelation
Workflow - new resource
Workflow - renewal

Under the hood… Analytics

Knowledge Base Explorer: Tickets

Tickets | Dates & Times | Source & Form Fields | Answerer & Turnaround | Referrer | Export Stats

ID | Full Text | Source: All Sources | Status: All

Asked from: 2015-01-04 to | Updated between and | Owner: View All

Queue: All selected (2) | Tag: Select tags... | Limit by Day: All Days | Limit by Time between: 00 hr and 24 hr

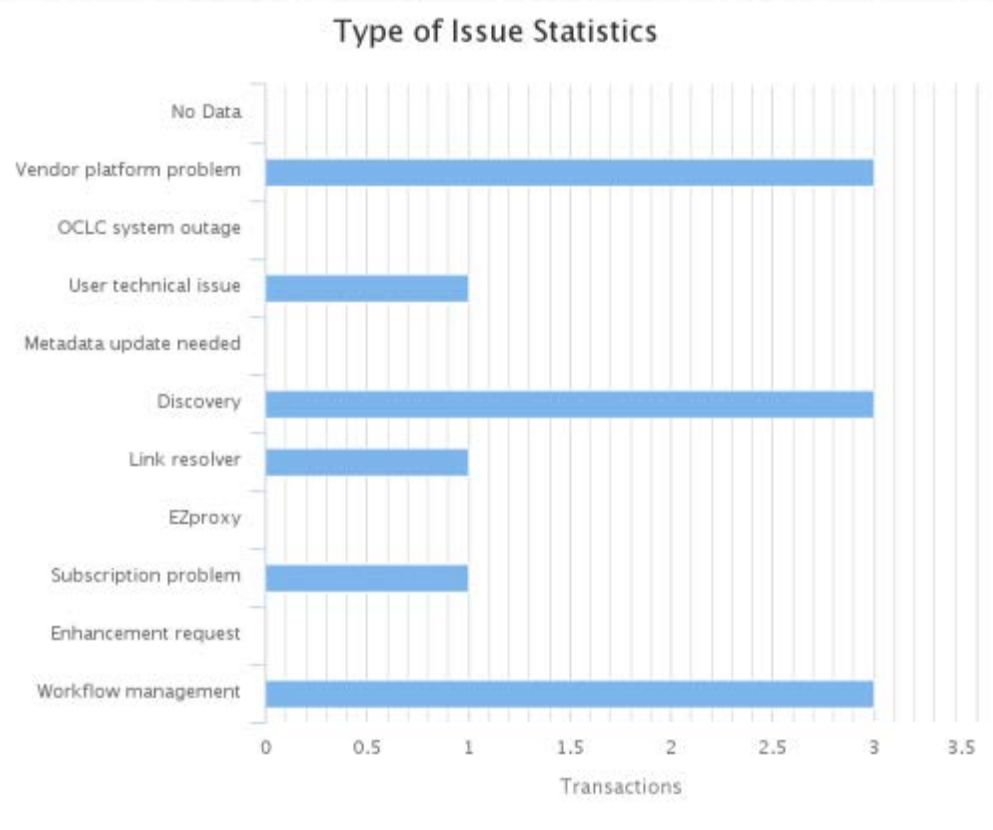
Turnaround (hours): <= | Name | Email | Filter (Clear filter)

Showing statistics for 36 (out of 36) Tickets

Monthly Breakdown

Queue	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
EKU eResources Queue	0	0	0	0	0	0	0	0	1	4	4	19	1
EKU Reference Queue	0	0	0	0	0	0	0	0	0	2	2	3	0
Total	0	0	0	0	0	0	0	0	1	6	6	22	1

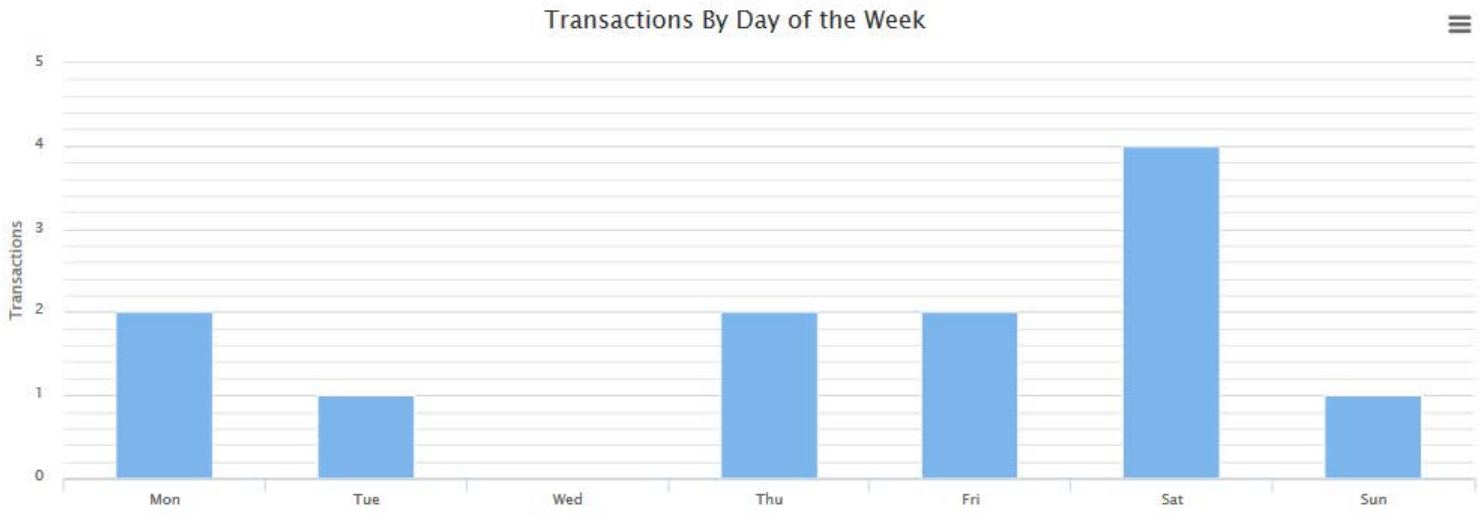
Under the hood… Analytics



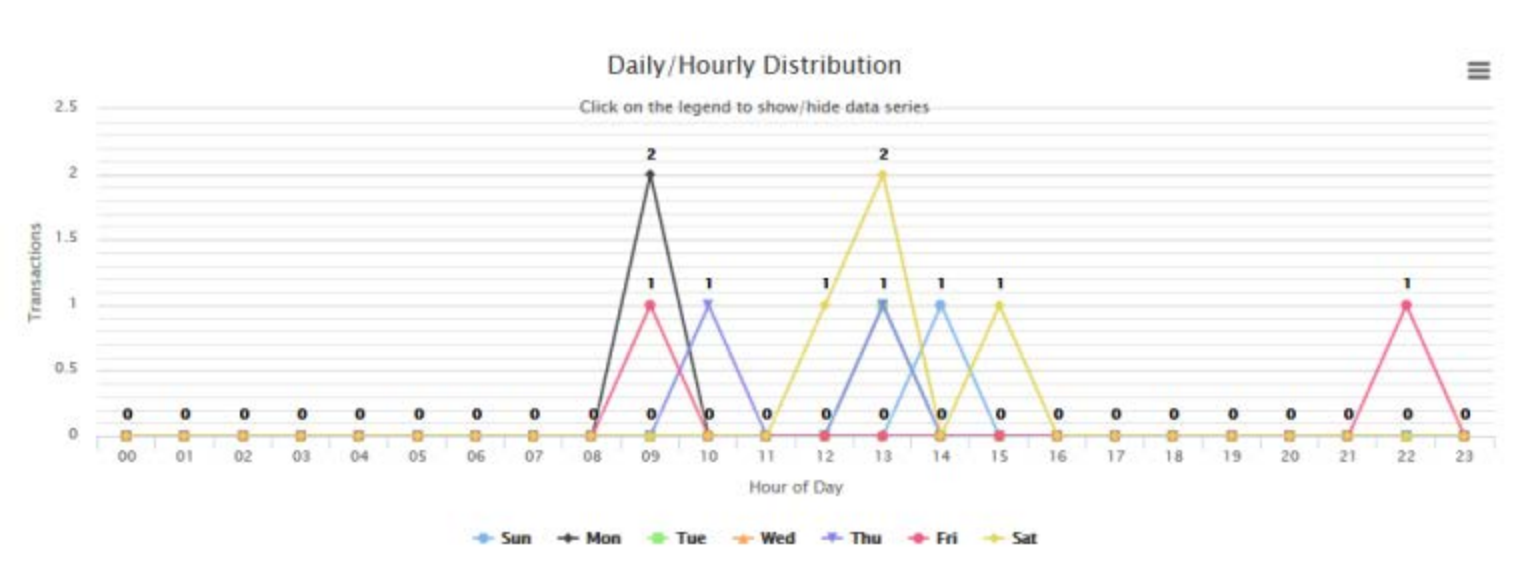
Under the hood… Analytics

Daily Distribution (on what days are the questions asked)

MON	TUE	WED	THU	FRI	SAT	SUN
2 17%	1 8%	0 0%	2 17%	2 17%	4 33%	1 8%



Under the hood… Analytics



Under the hood… Other Features

Resource Status Update Widget

Status

All databases are working normally!

Having issues logging in?
Clear your cache (CTRL + SHIFT + DEL) and try again.

Twitter Integration

683195

Thx @EKULibResources & @ekulibraries! Neuroscience display for Tali Sharot "Optimism Bias" #EKU Thur Dec 3 @ekupsy https://t.co/F4a80oZanN

Asked via Twitter

Queue: EKU Reference Queue
Status: No Response
Site URL / Related Link: No Response
Department or Class (e.g., ENG 102): No Response
More Detail / Explanation: No Response

ErikLiddell
(@ErikLiddell)

Under the hood… FAQ

EKU Libraries / LibAnswers / Collections Group

Internal Staff FAQ

LibAnswers: eResource Troubleshooting

7 Answers | Type your question | Search | Browse: All Groups Topics

Contact Us

Text us: 859-903-0848

Topics

EZProxy / Authentication Problem
Metadata
Subscription Problem
User Technical Issue
Vendor Platform Problem
Workflow Mangement

Popular Recent Featured

WMS link to eBook incorrect?
Last Updated: Nov 14, 2015 | **Topics:** Vendor Platform Problem | **Views:** 2

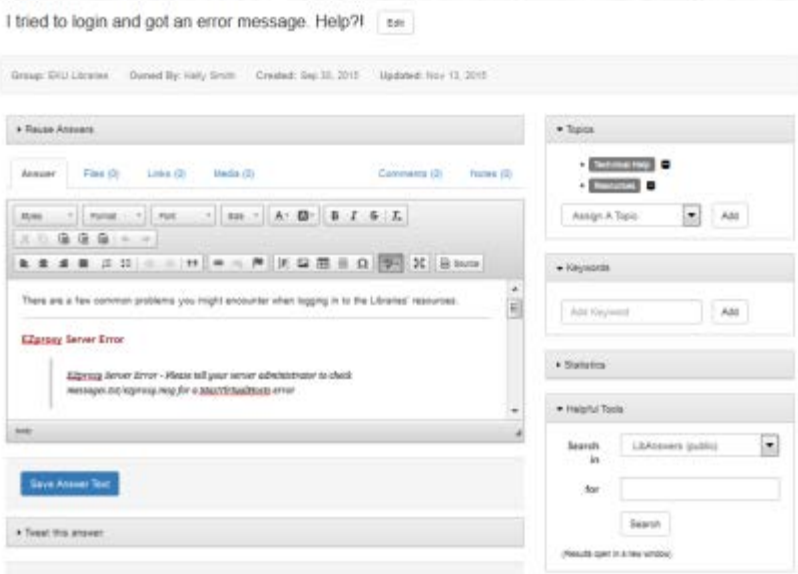
How do I report a problem broken open access link in an OCLC record that I can't change myself?
Last Updated: Nov 15, 2015 | **Topics:** Metadata | **Views:** 0

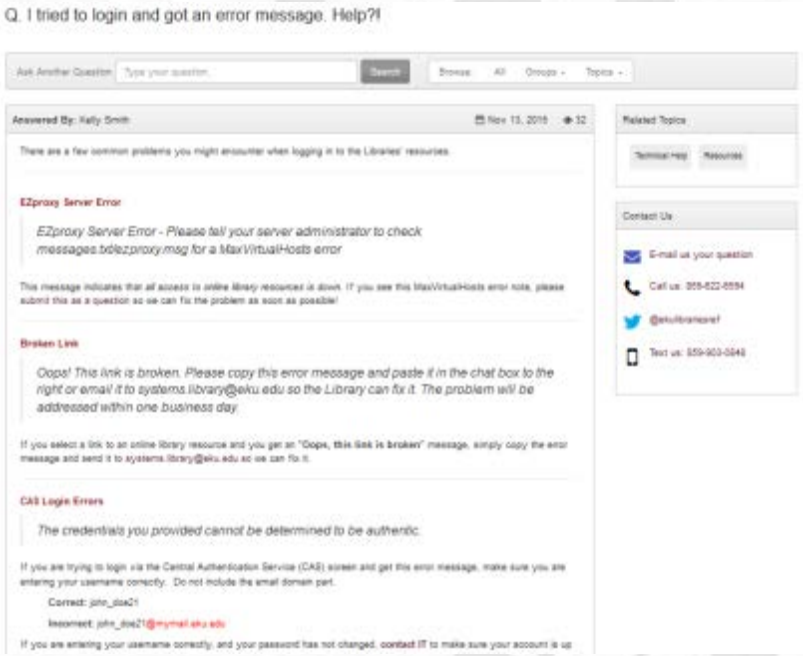
Problem accessing Chicago Manual of Style
Last Updated: Nov 14, 2015 | **Topics:** User Technical Issue | **Views:** 0

RKMA eBook Package 2016
Last Updated: Nov 14, 2015 | **Topics:** Workflow Mangement | **Views:** 0

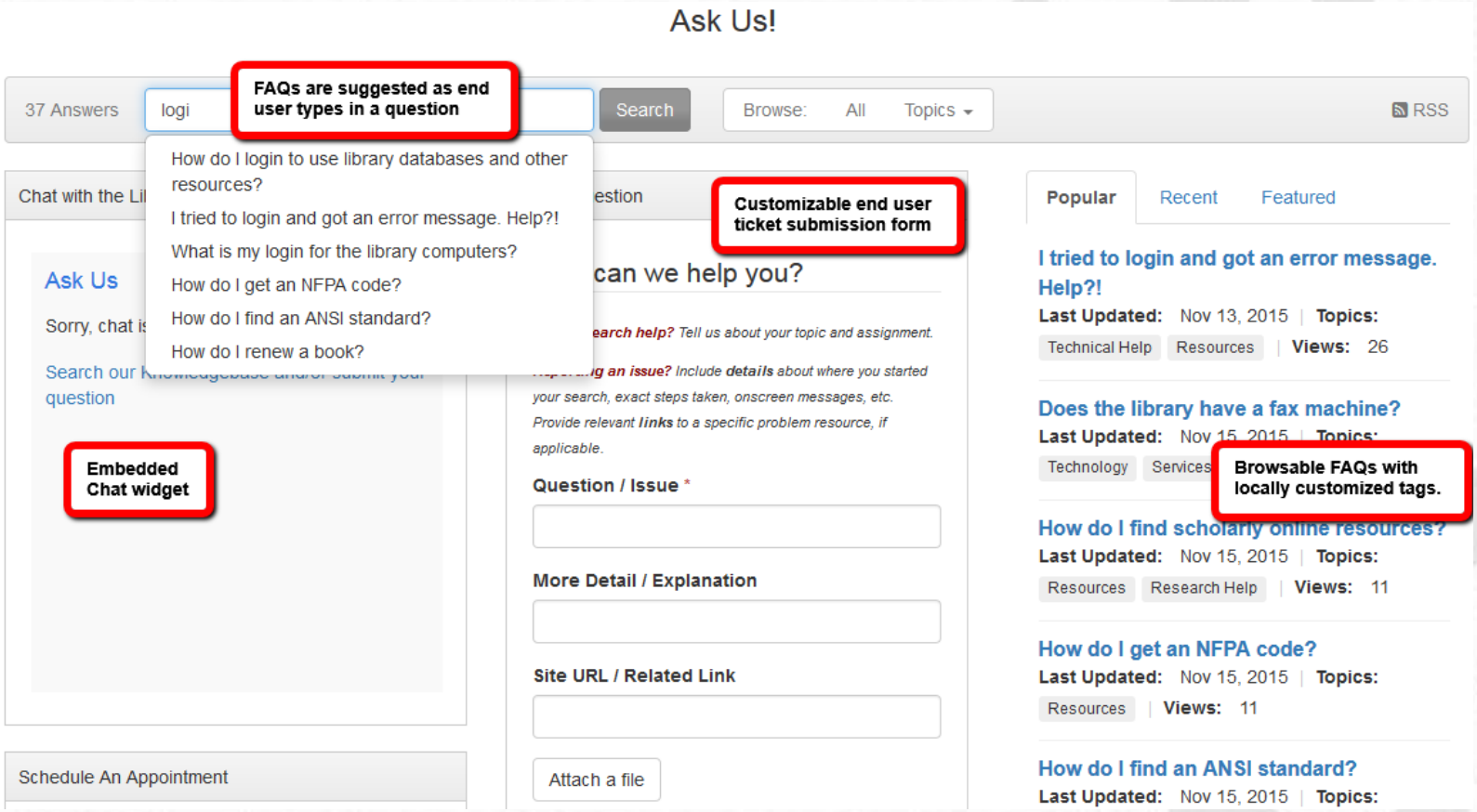
Access denied to All the World's Primates
Last Updated: Nov 15, 2015 | **Topics:** Subscription Problem | **Views:** 0

Under the hood… FAQ





Public portal… FAQ



Benefits

1. Ease of implementation
2. Customizability
3. Integration with existing Libguides
4. Intuitive interface
5. Ability to transfer tickets / assign ownership
6. Ability to merge tickets
7. Centralized management of ERM
8. Unique FAQ functionality

Q&A

https://www.polleverywhere.com/multiple_choice_polls/pqhvlHVEKFQQTUi

https://www.polleverywhere.com/free_text_polls/fqEtj1vK3hTYTnY

LITA/ALCTS Electronic Resources Management Interest Group
Robert Heaton and Buddy Pennington, Cochairs
ALA Midwinter Meeting 2016