

# Implementation

## Abstract

*Any new e-resource will need to be implemented. While implementation may be relatively straightforward for smaller resources, larger resources and new services may take a few months to get just right. Chapter 4 of Library Technology Reports (vol. 49, no. 2) “Techniques for Electronic Resource Management” presents a process for implementation. No matter how big the resource, it will need to be tested and set up in order to embed it into the collection. Training and awareness sessions for staff and users will help, as will a definite launch date that can be used to market the new resources to the intended audience.*

**A**ny new e-resource will need to be implemented. While this may be relatively straightforward for smaller resources, larger resources and new services may take a few months to get just right. No matter how big the resource, it will need to be tested and set up in order to embed it into the collection. Furthermore, implementation may actually take place in multiple stages to incorporate the resource or resources into the various online aspects of the library. Training and awareness sessions for staff and users will help, as will a definite launch date that can be used to market the new resources to the intended audience.

## Test

The first part of the implementation of a resource or service is to test. Just because a trial URL worked well does not mean that a full-blown service will work

without teething troubles. As a rule of thumb, follow these guidelines to fully test a new resource:

- Does the URL you have been given work? Did it work on the first day of the contract? If not, then this should be reported and noted for next year’s review (see chapter 6).
- Has EZproxy/Athens/Shibboleth or other authentication been enabled?
- Do the resources work from on and off campus?
- Has the resource been added to the federated search/web discovery service and A–Z lists?
- Have you added the resources to the appropriate modes of access? Have they all been tested?
  - university portal
  - virtual learning environment (VLE), e.g., Blackboard, Desire2Learn
  - library catalog
  - web pages
  - subject wikis and blogs
- Are there records that can be loaded readily into the online catalog, or do these need editing?
- When you set up and point your link resolver, does the resource link from other resources?
- Set up the admin interface:
  - Add the appropriate contact information.
  - Add library branding; faculty needs to know that this resource was brought to them by the library!
- Does the MARC download work and do uploads go smoothly, if appropriate?
- If MARC editing is needed, can this be accomplished with an editing tool?
- Do the usage statistics work?

## Marketing Matrix: Enter actions, responsibilities, and timings into the appropriate boxes.

You are encouraged to modify this table to suit your needs. You are not expected to use all the boxes. If you prefer, list the actions in the Appendix and put their numbers in the matrix.

Marketing channel \ Customer group	Undergrads and taught postgrads, part-time and full-time.	Academics and re-searchers	Support staff including library staff	Partner Colleges	Potential members of the University (staff and students)	Members of the public, including visitors and professional community	Users with disabilities
Website							
Plasma screens							
Email messages							
Text messaging							
VLE							
Within school/service e.g. posters, roadshow.							
Information skills training							
Student inductions							
Staff induction							
Interaction with Student Union							
Fact sheets							
Press releases							
Student newspaper							
Displays—temporary							
Displays—permanent							
Notice boards							
Presentations							
University publications (including prospectuses and handbooks)							
Via contacts with public library services							
Internal University conferences							
Via University PR function							
Blog							
University Facebook page							
University Twitter account							
Via University committees							
Via Student Panels/Course Committees							
Staff Bulletin							
Bespoke seminar/workshop							

**Table 4.1**

Sample marketing plan matrix (reproduced with kind permission from the Computing and Library Services Publicity and Promotion Group at the University of Huddersfield)

## Market

It is essential to have a marketing plan regardless of the resource you are implementing. Smaller resources do not need their own plan, but it is important to have a strategy for marketing your e-resources as part of the whole library collection or service.<sup>1</sup> For a major new acquisition or service, it will prove useful to have a separate plan. This plan should cover the needs, wants, and interests of all potential users (e.g., undergraduates, researchers, faculty, off-campus users, etc.) who may need to know about the resource. In addition, it should consider those groups in the university who need to be aware of the resource, such as library staff and colleagues in research administration.<sup>2</sup>

The customer groups detailed above can then be used to define different work packages in the marketing plan, as seen in table 4.1. As mentioned above, smaller resources do not necessarily need this kind of planning. However, it is useful to make sure their implementation fits into an overall service marketing plan, which identifies the objectives of the services and a matrix for communication to users.<sup>3</sup> The following sections consider some of the finer points of the marketing plan.

## Train and Document

Many vendors provide excellent training as part of the subscription. Use it! This training is often labelled as free; however, you are paying for it as part of the subscription. Most commonly, vendors will offer webinars, podcasts, conference calls, or a local trainer who can come out to you. Although webinars can be good for individuals and conference calls good to go over admin set up, etc., nothing beats a customized training session with a dedicated trainer. It can also be an ideal opportunity to invite other staff along to help publicize the new resource. Often trainers will tailor a session depending on who can attend and will be able to run a general session for faculty followed by a session on the admin interface for staff.

When a new resource or service is purchased, many libraries get to work on their own user documentation, be it simple web pages, wikis, blogs, podcasts, or printed user guides. This is an important part of the implementation; even if the resource is intuitive, users will often need guidance. In addition, make sure, if the resource acquired is replacing another resource, to update all web guides, subject guides, etc., and don't forget to search out the guides you left with departmental faculty last year! Many libraries make their training documentation and teaching material free to download and adapt. In the United Kingdom, this is often done through the JORUM service or by assigning a Creative Commons license. Other libraries

use the LibGuides service from Springshare to do this. This solution is relatively inexpensive and easy to customize.

### *JORUM*

[www.jorum.ac.uk](http://www.jorum.ac.uk)

### *Creative Commons*

<http://creativecommons.org>

### *LibGuides Community*

<http://libguides.com/community>

<http://libguides.com/community.php?m=i&ref=libguides.com>

### *Springshare*

<http://springshare.com>

Before writing any guides, do not forget to check out what the vendor has to offer; many produce generic guides that may be of use. Encourage them to make these guides copyright-free so that you can download them and customize them to your needs.

## Do a Soft Launch

Although a soft launch may not be necessary for smaller resources, a major change may require a soft launch and a period of review. With any major new resource, no matter how bad the old resource may have seemed at the time, there are always users (and staff) with a “better the devil you know” attitude to change. Although the temptation is to get a new resource out there as fast as possible, a short lead-in time may create problems in the long run. A soft launch midway through the year before a full system replacement in time for the new academic year allows time to get things right. If you are considering a soft launch, do not forget to build it into the marketing plan. Another way to ease a resource or suite of resources into the library environment is through staging the access points and when resources become available through various access points. An example would be to start with MARC record loads to the online catalog and then adding the resource to the library's web pages either through A–Z listings, database listings, or discovery tools, or through incorporation into course guides and instruction sites. By slowly building in the various access points, you are gradually introducing the resource to each audience within your online library environment. This works especially well with patron-driven acquisition models, where you do not necessarily want to expend the majority of your designated budget all at once. This also allows a greater period of time to explore how resources may work with various management tools used for these

different aspects of your online library.

For some services, such as patron-driven books, the soft launch may be the only launch you ever do; in this case, a big launch may result in the budget being spent far too quickly, and the service may then fail. For resources where you are replacing one vendor's product with another, you may be able to negotiate a period of "bedding in," where you can run the new service alongside the old one before the contract dates actually start. This will allow you to migrate users without too much inconvenience and will also give you time to persuade doubters that the new resource is so much better than the old one!

## Assess Feedback

Any soft launch should include a certain amount of user feedback. User feedback may also be useful for smaller resources between acquisition and launch. Feedback can be assessed in a number of ways: through questionnaires, focus groups, or even tracking usage statistics, etc. However, these approaches should be focused and questionnaires brief, ideally no more than ten questions, such as the example shown in appendix 4.1.

If you do ask for feedback at this stage, it may be useful to compare it to your evaluation later in the year (see chapter 5). You can also use it to identify possible participants for a focus group at a later stage, as it can be beneficial to use the same group in order to get consistency. You may find that some access points work better than others, and this feedback will help you learn which access point is optimal for each resource. For example, it may be that there is no need to load MARC records for aggregated database titles if you have a robust discovery tool. If you are loading records to your online catalog for patron-driven acquisition of e-books, then you may not need to have a platform listed in your database A–Z listing.

## Launch

Again, the scale of the launch may depend on the size of the resource. Regardless of the size of the launch, the timing is still very important. Major changes are

often best launched at the beginning of an academic year with as much notice to users as possible—that is, plenty of notice at the end of the previous academic year that the resource is going to be launched. If you are replacing a resource, give your users as much time as you can, as they may need to remove notes saved in the old resources or update websites and reading lists. Be sure to include guides, tips, and tools on how instructional designers and faculty can best incorporate new resources into courseware and learning management software sites.

Remember a launch, however small, is more than just switching the resource on! Links on the web pages, VLE, etc., need to be in place, and any training guides need to be ready. Targeting is also important. Some resources require major launches, either faculty-wide or university-wide, (e.g., a major new research database launched at a research festival). Others are best put "out there" with minimal fuss, as long as the right staff and users know.

## Notes

1. Zuzana Helinsky, "Marketing to Get Better Mileage from Your E-resources," in *E-Resources Management Handbook*, ed. Graham Stone, Rick Anderson, and Jessica Feinstein (Newbury, UK: UKSG, 2007), accessed October 23, 2012, doi:10.1629/9552448-0-3.10.1; Dinesh K. Gupta, Christie Koontz, Angels Massisimo, and Réjean Savard, *Marketing Library and Information Services: International Perspectives* (Berlin: Walter de Gruyter, 2006).
2. June Thoburn, Annette Coates, and Graham Stone, "Simplifying Resource Discovery and Access in Academic Libraries: Implementing and Evaluating Summon at Huddersfield and Northumbria Universities," project report (Northumbria University/University of Huddersfield, Newcastle, 2010), accessed October 23, 2012, <http://eprints.hud.ac.uk/9921>; Graham Stone, "Searching Life, the Universe and Everything? The Implementation of Summon at the University of Huddersfield," *LIBER Quarterly* 20, no. 1 (2010): 25–42.
3. University of Huddersfield, Computing and Library Services, "Marketing Review for Summon and Library Electronic Resources," accessed October 23, 2012, <http://library.hud.ac.uk/blogs/files/summon4hn/docs/Marketing%20Review%20Summon.doc>.

## Appendix 4.1 Sample User Survey

We are interested in your thoughts on our NEW library service.

### Ease of Use

1. How easy was the resource to use?

Ease of Use								
	Very easy	Easy	Quite easy	Quite difficult	Difficult	Very difficult	Not Applicable/ Did not use	Comment?
a. How easy are the screens to understand?								
b. Were the icons clear?								

2. Did you feel you needed help to use the resource?

- Yes      No

Comments (Optional)

3. Did you find what you were looking for?

- Yes      No

Comments (Optional)

### Refining Your Search

1. Did you refine your search?

- Yes      No

2. If you answered YES, please explain how you refined your search.

### Advanced Search

4. Did you use Advanced Search?

- Yes      No

5.a. If you used Advanced Search, was it easy to use?

- Yes      No

Comments (Optional)

5.b. Did it offer enough advanced features?

- Yes      No

Comments (Optional)

6. What did you like BEST about the resource?

7. What did you like LEAST about the resource?

### Your Results

These questions are about the results you received from your search.

1. Was the layout of the results clear?

- Yes      No

Comments (Optional)

2. Were the results relevant to your research topic?

- Yes      No

Comments (Optional)

### Further Research

If you are willing to be contacted for further research, please enter your e-mail address.