2CUL TSI E-Resources Working Group

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Charge (revised Dec. 2013)

The aim of the merged E-Resources Working Group and E-Resources Troubleshooting Team for Phase 2 is to: (1) examine current policies, practices, and workflows at Columbia and Cornell, (2) working with other 2CUL working groups and library units, propose, develop, and test consolidated and cross-institutional workflows, as appropriate. More specifically, for Phase 2 the group is charged to:

PHASE 2

- Working within the team and in concert with other 2CUL working groups and library units, further examine points of discord to determine which differences are crucial to operations and quality service at each institution and which can be better harmonized to improve efficiency and service and/or eliminate redundancies. This review should incorporate and may, to some extent, build on the work of both the E-Resources Working Group and the E-Resources Troubleshooting Team.
- Plan ways to best utilize relevant staff at each institution for ongoing proactive maintenance work, regular just-in-time troubleshooting, as well as related special projects.
- If the decision to implement 2CUL Alma in 2015 goes forward, work together to develop workflows in the new system to maximize effectiveness for the integrated technical services operation. If the decision to implement 2CUL Alma is postponed beyond 2015, work together to develop and adjust workflows using our separate Voyager systems to the same end. Test and pilot new ideas, as appropriate, in consultation with the TSI JSMIN group and the TSI assessment leads. Plan a path forward if Alma is delayed.
- Recommend and implement tools to enhance 2CUL e-resource troubleshooting activities and e-resources management. i.e. Incident ticketing /tracking, remote access testing. Working with the team and in concert with other 2CUL working groups and library units, propose, develop and test the feasibility of collaborative projects and consolidated workflows, as appropriate.
- Recommend that a group look into the pros and cons of making more troubleshooting information available to the public.
- Through a subgroup of this team evaluate the knowledge bases used in e-resources work, including, but not limited to, Alma, not only in regards to content coverage, but what works and how it works in providing and maintaining access to e-resources.
- Provide input for the creation of a space for shared TSI documentation. Edit and package existing and new documentation for optimal use in this shared space (expected sometime in 2014), keeping in mind the eventual need to distinguish between 2CUL and locally specific guidelines and policies.
- Maintain an inventory of relevant expertise, as needed.
- Provide assistance to the TSI Steering Committee in the form of feedback and, if necessary, data to measure the costs and benefits of the all the preceding steps, plus any new 2CUL tasks or initiatives related to this charge. This evaluation will guide future decisions about the practicality of long-term integration of e-resources activities and initiatives.
- Communicate regularly with the 2CUL TSI Steering Committee, through the dedicated liaison with that group and/or through publically posted meeting notes, reports, or other announcements.

The group is strongly advised to observe the Operating Principles for Technical Services Integration.

Leads: Jesse Koennecke (chair -- Cornell), Joyce McDonough (Columbia)

Other Members: Susan Marcin, Liisa Mobley, Colleen Major, Bill Kara

Liaison to TSI Steering Committee: Adam Chandler

Timeline:

- Phase 2: January 2, 2014 – June 30, 2015
- Follow-up and ongoing development, including, but not limited to Phase 1 recommendations.
- Propose, develop, and test consolidated workflows in Voyager or other systems, as appropriate for shared problem solving.

Meeting Notes