Biz of Acq — LibGuides: Changing the Game for Technical Services Procedures & Policies

by **Kat Landry Mueller** (Electronic Resources Librarian, Sam Houston State University, 1830 Bobby K Marks Drive, Huntsville, TX 77341; Phone: 936-294-1613; Fax: 936-294-3282) <klandry@shsu.edu>

and **Molly Thompson** (Principal Catalog Librarian, Sam Houston State University, 1830 Bobby K Marks Drive, Huntsville, TX 77341; Phone: 936-294-1613; Fax: 936-294-3282) <mthompson@shsu.edu>

Column Editor: **Michelle Flinchbaugh** (Acquisitions and Digital Scholarship Services Librarian, Albin O. Kuhn Library & Gallery, University of Maryland Baltimore County, 1000 Hilltop Circle, Baltimore, MD 21250; Phone: 410-455-6754; Fax: 410-455-1598) <flinchba@umbc.edu>

Have you ever tried to play a board game without any instructions or rule book? This scenario is too familiar for many Technical Services staff. While librarians are stereotypically excellent at preserving and ensuring access for patrons, there is a noticeable lack of instructions when it comes to documenting their own workflows and procedures.[1] Technical Services librarians at **Sam Houston State University's Newton Gresham Library** are trying to "change the game" when it comes to internal documentation of procedures and workflows.

Sam Houston State University (SHSU) is a Doctoral/Research University located in Huntsville, TX. The Technical Services department at **Newton Gresham Library (NGL)** consists of 5 units, 7 librarians, and 11 paraprofessionals. The Technical Services units are: Acquisitions, Cataloging, Electronic Resources, Bindery, and Collection Development. **Kat Landry Mueller** is the Electronic Resources Librarian and **Molly Thompson** is the Principal Cataloger, both hired in the fall of 2012. As supervisors, we started examining written procedures and policies in our respective areas and found a huge amount of disorganization, duplication, and believe it or not, paper! We also had trouble finding written evidence of key policies and procedures. Our goal in exploring a new system of documentation was to have a seamless, localized, and logically organized approach for recording and displaying important Technical Services information.

Past Attempts at Documentation

Historically, there have been printed training binders as well as multiple on-campus servers which have hosted procedures and documentation. A major problem with having multiple locations of storing procedures was that when a staff member could not find a procedure in one location, they would generate a newer version. Alternately, copies existed in 2-3 locations, but only one copy was being revised with changes and new information. While redundancy is generally a beneficial IT security policy, it was not a helpful feature for procedures, as there were multiple copies containing duplicate, incorrect, or outdated information. This was confusing to new and existing staff. An additional complication was that the oldest server, which contained the majority of the procedures, was no longer being supported by the IT department, and thus migration from this server was imminent.

Beyond the server problem, there was no universal organization structure. Multiple folders existed on these servers, and each unit was storing files differently. Many of these procedures were outdated and had never been updated from the initial documentation. There was also no department-wide mandate to create procedures and document workflows. Therefore the depth and breadth of documentation and procedures varied wildly among units within Technical Services. Further adding to the confusion was a lack of standard file format. There were Microsoft Word documents, Adobe PDFs, Microsoft PowerPoint presentations, video tutorials, and stand-alone images (typically screenshots).

The previous attempt to make information and forms available among the department was to set up a free PBworks (formerly PBwiki)[2] Webpage. The **NGL** wiki was created in May 2008 and was initially intended for the Reference Librarians. A Technical Services wiki was created shortly after, but the PBwiki platform did not have features that in-depth Technical Services procedures needed, compared to the Reference department's information. The Technical Services wiki essentially housed only downloadable Word documents, hyperlinks, and general information (plain text). The shortfall of the Technical Services wiki was that it was not user-friendly in viewing or editing. Formatting and aligning text, adjusting the layout, and embedding images were not easily accomplished in the wiki. Pages frequently were difficult to print, creating and updating tables within the wiki was next-to-impossible, and a single username and password allowed anyone to edit every page. Additionally, in order to keep the page restricted only to **NGL** librarians and staff, logging in was required, even to just view information. The principal flaw of the Technical Services wiki was that it was not often referenced or updated by staff or librarians, presumably due to the unfriendly interface. After attempting to revamp the Technical Services' wiki pages, ultimately the decision was made to seek a different product that would better suit the needs of the department.

Why LibGuides?

While other options for a collaborative Webpage exist, the choice had to be inexpensive (or FREE), user-friendly, and both flexible and customizable. Wiki pages remain a popular option; however, our negative experience with the free PBwiki Webpage dissuaded us from pursuing that option (we cannot speak to how a paid account would have functioned). Many Technical Services librarians were already familiar with SpringShare's LibGuides[3] platform, from creating research guides as subject selectors and using them at the reference desk. It was decided to utilize the existing subscription and create a Technical Services LibGuide to house policies and procedures. The flexibility of the platform to easily aggregate multiple file formats and intuitively display procedures were the major attractions for selecting LibGuides. Most importantly, the system had to be easy for everyone to use, whether adding content or simply viewing it.

Setting up Technical Services LibGuides:

The Web Services Librarian set up the main Technical Services LibGuide in April 2014. Only librarians added content from April through August of 2014 to test the features and decide if it was suitable. Existing research guides were still using version 1 of LibGuides, but in consideration of the impending migration to version 2, the Technical Services guide was created in the new version. The Web Services Librarian provided training to Technical Services faculty and staff at the end of May.

The Technical Services LibGuide is an "internal" (private) guide in order to: protect passwords and sensitive information, avoid search engines indexing these Webpages, and prevent confusion to patrons who would likely not find any of this information useful. Currently only Technical Services librarians and staff members are able to edit these private LibGuides, but anyone can view it by going to the URL. Since the guide is internal and private, a viewer must know the URL, as search engines are not crawling these Webpages. Due to the wiki's underutilization, logging in is not required for view-only access. Sensitive information is available on the guide within password-protected PDFs.

LibGuides allows all librarians and staff members to have individual accounts, which can be customized to control editing privileges. Typically whoever creates the guide is the guide owner (usually a librarian within each unit). Guide owners are responsible for organization and keeping the content current, as well as granting editing privileges to appropriate staff members. Staff are encouraged to post procedures and assist with the guide in order to increase department-wide adoption.

Figure 1. (*former*) free PBwiki account: Technical Services Wiki, compared to (*current*) SpringShare LibGuides: Technical Services internal, private LibGuide

The Technical Services LibGuide is arranged in a two-column layout with one content column and a left side navigation column. The two columns are spaced left to right with approximately 30% of the space for the left navigation column and 70% for the main content in the right column. On most pages, a box below the navigation menu indicates the guide owner and their contact information. As more information is being added to the LibGuides, some information may be better displayed as a single-column or three-column layout, but the layout can only be applied to an entire guide; specific pages within a guide cannot have different layouts. The horizontal tabs layout, the default for LibGuides version 1, is not being used, as the consensus was that side navigation better displays procedure-based content.

Using LibGuides for Technical Services:

The **NGL** Technical Services department is using LibGuides in a variety of ways. The main guide for Technical Services links to each unit's guide. It also contains the Technical Services department organizational chart, contact information, an annual projects timeline, and lists of working groups.

Microsoft Visio[4] diagrams of workflow processes provide visualization of individual units' tasks as well as the department's organizational chart. This chart denotes librarian and staff positions, summarizes one or two main responsibilities of each position, and outlines supervisory relationships. This organizational chart not only helps new department employees, it also helps librarians and staff members outside Technical Services to know whom to contact. Embedding workflow diagrams and images is an uncomplicated and useful feature of LibGuides.

Technical Services is also using LibGuides' rich-text content boxes when recording meeting minutes, which can be easily referenced by attendees and non-attendees. Participants update the agenda prior to the meeting; additional information is recorded throughout the meeting in order to accurately record ongoing project management as well as policy updates and creation.

Each unit has a separate LibGuide linked within the main Technical Services guide where respective policies and procedures are housed. Procedures are created in LibGuides or copied from Word documents, and images, if needed, are embedded. A PDF of the original document is usually uploaded to the LibGuide and made available for download or printing. Additional features included are links to library resources in the catalog, gallery boxes which rotate hyperlinked images, and widgets. Adding content is a continuing process that will never end as policies and technologies are constantly changing.

Key Benefits

There are many benefits of using LibGuides for Technical Services' documentation. It has already been used to train new staff members and student workers and is also the planned acclimation tool for the new head of Technical Services. With documentation hosted through LibGuides, Technical Services is being more cost-effective and environmentally-conscious by not printing training binders. The LibGuide content is the most recently updated version, making it the most authoritative. Other advantages include that the LibGuide easily assists in capturing and retaining institutional knowledge, content can be reused between units, and policies are more transparent to other departments. The departmental organization and individual areas of responsibilities are now visible to other areas of the library, which leads to expediency when addressing issues.

Challenges

One major challenge was, and still is, getting everyone in the department comfortable creating and editing LibGuides. There are varying levels of technological skills among department members, which is important to keep in mind when training. Not everyone feels comfortable "playing around" with the features, thus those staff and faculty require more in-depth training. Important institutional knowledge is held by library employees with varying levels of computer skills,

so encouraging documentation of relevant information can be difficult depending on their comfort level with LibGuides.

A missing LibGuides feature is the ability to bulk upload and download screenshot pictures out of the image gallery. Before embedding pictures, the image must be uploaded to the gallery. When a procedure requires multiple images, it is time consuming to upload each image. Another major issue is that one cannot search within the guides due to their "private" settings. Another challenge is logically designing each guide. Avoiding oversaturating any guide or page with information is essential. Pages are moved and created as needed to navigate efficiently. Staff involvement is key in this process, as they typically need to reference the procedures most frequently. Review by someone outside of the department assists in finding areas needing revision. Lastly, finding time to create and maintain the LibGuides as well as create new procedures remains a constant challenge.

Conclusion

Future ideas for additional uses of Technical Services LibGuides include: collecting acquisitions, cataloging, and electronic resources usage statistics via an embedded widget; cross-training employees within Technical Services; and mirroring selected content for the public to see. LibGuides has thus far proved to be an effective system for documenting Technical Services procedures and policies. As with any documentation system, continued success depends upon continuous updating, maintaining access, and widespread adoption. 🐾

Endnotes:

White, H. C. (2005). Documentation in Technical Services. *Serials Librarian*, *49*(3), 47-55.

PBworks Wiki: *http://www.pbworks.com/wikis.html*

SpringShare LibGuides: *http://springshare.com/libguides/*

Microsoft Visio: *https://products.office.com/en-us/Visio*

Figures:

Figure 1: (old) Tech Services wiki vs (new) Tech Services LibGuide: side-by-side comparison

Related Material:

Bazeley, J. (2015, April 15). Using LibGuides in Technical Services [Webinar]. Retrieved from *http://www.ala.org/alcts/confevents/upcoming/webinar/041515.*

Blake, K., and **Stalberg, E.** (2009). Me and My Shadow: Observation, Documentation, and Analysis of Serials and Electronic Resources Workflow. *Serials Review*, *35*(4), 242-252. doi:10.1016/j.serrev.2009.08.018

Mackinder, L. (2014). The Seemingly Endless Challenge: Workflows. *Serials Librarian*, *67*(2), 158-165. doi:10.1080/0361526X.2014.940481