Customer Service and Systems Administration Guide

This document provides the 'Business As Usual (BAU) team with details on the roles and responsibilities for the ongoing management of eReserve Plus at an Institution. It is designed to bridge the gap between the BAU Team and the Project Team that may have been seconded temporarily for the initial implementation.

The document also outlines the impacts of changes that the Institution may make and how eReserve can work in partnership with customers to ensure the service continues to run smoothly.

eReserve Team

The eReserve Team will work closely with Library Staff and IT Staff to ensure the ongoing success of eReserve Plus. The team from eReserve, following a successful implementation of eReserve Plus includes:

- Technical Support Team - First line assistance is available by telephone or email or via the support portal. You can also arrange a screen-sharing session by emailing the team to setup a convenient time.
  - Support Portal: - http://support.ereserve.com.au
  - Email: support@ereserve.com.au
  - Phone: (02) 6622 2725

- Customer Advocate - Regular monthly meetings are facilitated by the Customer Advocate with a Standing Agenda over a web conferencing facility.
  - Email: customer.advocate@ereserve.com.au

- Customer Accounts - All contractual and biling enquiries are managed by emailing Customer Accounts.
    - Email: accounts@ereserve.com.au

Roles and Responsibilities

During the initial implementation of eReserve Plus, the joint Project Team led by the Institution's Project Manager and the eReserve Customer Advocate used a system called Pivotal Tracker to collaborate on project milestones and tasks to ensure everyone on the project had visibility of the milestones to Go Live. Access to the Pivotal Tracker project is available to the BAU Team on request.

Throughout the Onboarding and deployment process, the Customer Advocate met with the Project Team on a fortnightly basis to ensure that the implementation was on track and any blockages or tasks were being worked on by all parties to ensure timely delivery and project success. Post Go-Live, these regular meetings are facilitated on a monthly basis by the Customer Advocate. It is ideal for the Manager and BAU Team members to attend. There is a Standing Agenda which ensures eReserve continues to work closely with customers and areas for discussion include:

- What has gone well this past month
- Outstanding Support Tickets
- eReserve Roadmap and Enhancements

The online meetings usually run for half-an-hour and are recorded for record-keeping purposes.

Following Go-Live, it is recommend that the BAU Team members register for the eReserve Support Portal so they can keep up-to-date with progress on support tickets by visiting https://ereserve.zendesk.com. Where you experience difficulties with eReserve Plus, first contact can be made by emailing support@ereserve.com.au.

> eReserve recommends the BAU Team register for first line support at http://ereserve.zendesk.com

Accessing eReserve Plus

The majority of implementations deploy eReserve Plus to two Environments in the Cloud; a Staging and a Production Environment. The URLs consists of the domains that have been chosen by the institution will replace the [ereserve] in the URL. To access the Administrator Interface of eReserve Plus, please visit the following URLs:

The Staging Environment is in place for eReserve to release new features for you to test before the feature goes into the Production Environment.
`https://[ereserve]-staging.institution.edu.au/`

Production is your Live Environment.
`https://[ereserve].institution.edu.au/`

eReserve has access to your Live Environment but will not make changes to your data without your express instructions.

You may also opt to setup a Training Environment. We create training environments in two ways; short-term spin-up environments or permanent environments. The training environment is typically put in place to train end-users on a stable code base and dataset. The Staging environment cannot be guaranteed as we employ a continuous release of minor software amendments.

Students and Academics will access eReserve via the Learning Management System where eReserve Plus is embedded into the page.

Ongoing system administration

There are a number of configuration elements which require ongoing attention for both the eReserve Plus team and for the Institution's own BAU Team (including Library and IT Staff).

This section of the Systems Administration Guide is divided into two sections to assist teams with best practices with regard to managing ongoing configuration and data. Configuration elements recommended for the Institution are a guide only and the eReserve Support Team is able to assist wherever the technical resources at the Institution may not be available.

1. Service from the eReserve Team

There are a number of configuration elements which the eReserve Plus team will continue to manage and maintain with customer direction. Each of these is outlined below.

1.1 Software

eReserve's software development lifecycle operates using the Agile methodology. As such, software is delivered via a continuous deployment strategy and any minor or major software updates will be communicated via a broadcast newsletter to all customers or in monthly customer meetings with a Customer Advocate.

Minor software amendments are usually deployed to Staging and Production in short succession. Major amendments on the otherhand are discussed with customers and a mutually convenient time for deployment to Production is agreed with the Customer Advocate.

New Features and improvement suggestions are positively encouraged! You can submit or keep track of 'New Ideas' on the public Roadmap for eReserve Plus:

https://ereserveplus.roadmap.space/

or

by submitting a support request (the eReserve Support Team will add it for you).

> To get on the mailing list for minor software updates, please contact support@ereserve.com.au or the Customer Advocate

1.2 Environment Setup and Refresh

eReserve will continue to manage Environments on the Cloud and is responsible for monitoring uptime and service levels according to the contract.

Copying from Production to Staging
The team recommends a regular refresh of data from Production to Staging. We usually undertake this task at your request and need at least 2 days notice. The copyback will over-write all data including User Accounts, Integration Records etc. Please also note that the files for file-based readings (binary data) will not be copied as a standard and you will be asked to confirm whether this is a requirement.

Copying from Staging to Production
Data cannot be copied from Staging to Production and to move data in this direction will require you to manually re-key data or consider the Flat File Import mechanism that is available in the product to import Readings or Requests.

> Where any difficulties are experienced or a refresh of an Environment is required, the first line of contact should be with support@ereserve.com.au

1.3 Citation Styles

Readings are presented to Students from eReserve Plus using standard citation style templates. eReserve uses the Citation Style Language (CSL) format to support the different types of citation styles available and therefore supports over 850 citation styles. The APA (America Psychological Association, 7th edition) style is the default in eReserve Plus.

The initial Project Team advised eReserve of the CSL templates to employ in eReserve Plus, and they will have set the default style for each School. It is the responsibility of the Institution to advise eReserve of any updates or changes which may be required to the CSL template(s) employed. You can ask eReserve to use the standard CSL templates or supply a link to Citation Styles which are managed by your own Institution from a repository like Zotero.

Additional Citation Styles can be added or amended by the eReserve Team when they are provided with a link to the source Citation Style Template you would like in your eReserve Plus System.

You can find the source for a Citation Style by following these steps:

1. Visit https://www.zotero.org/styles
2. Use the search facilities to find your desired Citation Style
3. Hover over the style you want to use and 'View Source' button will be displayed
4. Click on 'View Source'
5. The source for the style will be displayed and the URL will be in the browser address bar.

If a Citation Style is not available, the Citation Style editor can be utilised to create a customised Citation Style. Ideally start from a similar style and make the customisations based on that style rather than creating a new Citation Style from scratch.

> Please advise eReserve of any new or amended Citation Style templates by raising a Support Ticket

1.4 Theming

Faculty and Student access to eReserve Plus is available from the Learning Management System which has been styled by the eReserve Team to fit seamlessly with the look and feel of your Learning Management System.

To review the Theme employed, you may login to your Learning Management System and click on the eReserve Link. Customers are recommended to embed the iframe into the Learning Management System page. If you wish to control the size of the iframe, you will need to contact your IT team for them to make the necessary changes.

> Please advise eReserve of any new or amended Theme by raising a Support Ticket

1.5 Email customisations

Email confirmations are sent to Academics and Library Staff from eReserve Plus when Readings are added by RIS uploads or when a Reading is rejected. There are a number of Email Customisations that eReserve configured for your Institution:

1. The email template was configured with standard content;
2. The sender address (default: 'eReserve Team' noreply@ereserve.com.au) is likely to have been amended for your Institution;
3. A Blind Carbon Copy (BCC) email address is likely to have been set so that this selected email address will receive all emails that are sent from the system to Academics;
4. If your Institution has an external customer support system to manage feedback or help enquiries, there is a customisation to enable a link to that email address from within eReserve Plus.

> Please advise eReserve of any new or amended Email Customisations by raising a Support Ticket

1.6 Configuration of the Discovery Layer and/or Library Systems

Connecting eReserve Plus to your Catalogue or Discovery Tools is an essential way to leverage the capabilities of your existing systems and ensures that Academics utilise existing subscriptions and resources. This functionality is available via 'Find an Existing Reading'.

The eReserve Team have a standard set of Integrations for each type of system and additional configuration elements may have been applied based on the source system's configuration for your Institution. The Project Team will have been supplied with a configuration mapping file for the Integration during the initial implementation.

The configuration of the Discovery layer is set in eReserve Plus and users with the 'Site Manager' role are able to review the record(s).

The Institution has control over one element of the Integration Record called 'Preferred Search'. Enabling 'Preferred Search' will ensure the Integration is preselected by default as a 'Location' in 'Find an Existing Reading'. It should be noted that enabling this element of the configuration will also utilise the Integration as a primary lookup for matching when adding new records to eReserve Plus. This ensures duplicate records are not created and encourages re-use of existing records.

> If you are experiencing any issues with the return of results from your Discovery or Catalogue Integration to eReserve, please let the eReserve Support know by raising a support@ereserve.com.au

1.7 Configuration of Course Code Filter

eReserve Plus is connected to the Learning Management System (LMS) via a standard integration method called the Learning Tools Interoperability (LTI) protocol.

When eReserve Plus was first setup, the course records were imported via a Flat File mechanism. Following GoLive, this Course Import is no longer required because the LTI integration is in place. During the initial implementation, the course codes utilised by the Learning Management System(s) at your institution were analysed to find patterns in the label that is created for the course name. An expression was created to manage the creation of new courses for each new Teaching Session - this is called the Course Code Filter in eReserve Plus.

These Course Filter expressons may need to be amended from time to time because of the way course names are constructed by the LMS changes. The configuration of the LTI integration is set in eReserve Plus and Users with the `Site Manager` role have privileges to manage the record(s). The Course Filter expressions entered into the configuration record are version-controlled by the eReserve Support Team.

> If the Course Filter expressions require new analysis or amendment, please let the eReserve Support Team know by raising a support@ereserve.com.au

1.8 Removal of Records

The data inside eReserve Plus is owned by the Institution, however the eReserve Support Team have access to your Environments to assist with support queries. From time-to-time we are asked to delete spurious records such as Courses, Readings or Reading Lists which have been created in error. Generally there are user tools available to assist, however eReserve may be able to assist where user controls are not available.

- Course records: Courses can be deleted by eReserve on request. You will need to supply the full course name.
- Reading records: Readings can be deleted by the eReserve Team where the BAU Team does not have control. You will need to supply the ID(s) of the record(s) which can be obtained from the URL.
- Reading List records: Reading Lists can only be deleted where there are no Reading records left on the Reading List.
- Teaching Sessions records: Teaching Session names can be updated or retired by users with the 'Site Manager' role.
- Integration records: Integration records for Learning Management Systems should not be deleted as they link to related authentication information about Students and their utilisation of readings.

> Please advise eReserve of any records which require removal in the back-end database by raising a support@ereserve.com.au

1.9 Adhoc Reports

eReserve Plus has a number of reports embedded in the system, as well as an API. The data available varies depending on the country or region you are in. If these reports are not providing the necessary management information required by your Institution, we are happy to assist. The eReserve Support Team regularly run adhoc reports for our customers as we have access to the underlying database.

> Please advise eReserve of any adhoc reporting requirement, specifying the conditions and columns expected in the .csv file to be supplied

1.10 Refresher Training

eReserve creates a wide range of training materials including videos and documentation to support staff involved in creating and maintaining Reading Lists (Academics or Teaching and Support Staff) as well as Librarians and Copyright Officers involved with the review and approval of resources for Reading Lists.

You are welcome to re-use the content as you see fit for your Institution.

The Project Team initially attended train-the-trainer sessions for the Academic Interface and the Admin Interface.

> If you'd like to book further training, please discuss this with the Customer Advocate. Refresher sessions can be run remotely whilst face-to-face training is chargeable.

1.11 eReserve Checklist

The eReserve Team will perform the following tasks as part of our service to you:

- Environment setup and refreshes

- Citation Style template loads
- Theme updates
- Email customisations
- Course Filter alterations to suit the Learning Management System integration
- Discovery Layer integrations
- Removal of records
- Adhoc reports
- Refresher training

2. Administration by the Institution

There are a number of configuration elements which the Institution can maintain. Each of these System Administration functions is outlined below.

2.1 User Management

Any user with the 'User Manager' role can manage Users and their roles in eReserve Plus.

Understanding what these roles are and how they are used will help you decide the appropriate level of access for each new user of the Admin Interface.

- User Manager: This role gives the User the tools to create and manage User accounts
- Site Manager: This role is for staff who are required to manage integration records and settings for eReserve Plus. Typically this is given to the Learning Management System and Library Catalogue Administrators, allowing them to create and configure integrations with those systems
- Document Manager: This role is given to users who require full access for the day-to-day management of Readings and associated Requests
- Copyright Officer: This role includes access to all of the features of the Document Manager and additionally includes access to Reports (i.e. Audit and Utilisation)
- Insight API User: This role is available if the eReserve Insight API Feature Switch is enabled. This role is given to a user who is required to extract data using the eReserve Insights API.

You are not required to add Academic or Student accounts to the system as they will be automatically created when Academics or Students access a Reading List from the Learning Management System for the first time.

Please note that if the eReserve Support Team is instructed to refresh the Staging Environment from Production, all user accounts will be over-written by the user accounts stored in Production

> Training Documentation - User Management - Manage new starts and leavers

2.2 Teaching Sessions

Teaching Sessions are typically configured by a user with the 'Site Manager' role and provide a set of standard dates for Reading List availability in the system. Teaching Session records can be created, updated or retired.

The Start and End Dates of a Reading List are primarily set by Predefined Start and End Dates, usually reflective of Semester, Course Periods etc.

It is common for these dates to be different from the actual Semester dates so the Students can then access their Reading Lists before Semester officially starts. Some Institutions will set the Teaching Session dates to begin two weeks before the Semester officially starts and a month after the Semester ends. You Institution will have made a decision on the policy to employ during the initial implementation.

> Training Documentation - Manage Teaching Session Records

2.3 Schools

So that eReserve can generate meaningful Audit and Utilisation Reports, eReserve Plus groups the Courses into Schools. The Schools setup in the system means Academic Staff can select the appropriate School when they update a Citation Style for their own Course.

A user with the 'Site Manager' role can configure the Schools records, and later set the default Citation Style for each School once Citation Styles have been setup by the eReserve Team.

During the initial implementation, a list of Schools will have already been setup in eReserve Plus. If the School name changes, you can amend the label and the change will be reflected globally. If however, you want to report on the old School Name as well as the new School Name, you will be required to create a new record and retire the old record.

> Training Documentation - Manage School Records

2.4 Connecting the Learning Management System

Each instance of a Learning Management System at your Institution can be setup and connected to eReserve Plus using LTI by your LMS Administrator.

To manage and maintain the integration records, there is an LTI Guide for each LMS. The guide covers the setup of the LTI integration as well as the detail on how to setup the LMS for the eReserve Resource Linking Features.

Please note that if the eReserve Support Team is instructed to refresh the Staging Environment from Production, all Integration Records will be over-written by the Integration Records stored in Production and therefore, the configuration of the Staging records will be required to be reset. eReserve will take a screen-shot of the record prior to the copy-back and make it available to you to assist.

> Guide Documentation - LMS Integration Guide

2.5 Flat File Imports

Following the initial implementation of eReserve Plus, it is unlikely that Flat File Imports will be required, however if a bulk ingest of resources is required into eReserve Plus then there is a single mechanism to undertake different types of imports for Requests or Readings.

More detail on the pre-requisties of using the Flat File Import function is available in the Flat File Import Guide. The eReserve Support Team is available to mentor or coach staff through the Flat FIle Import process. Another aspect which may be useful is to supply the eReserve Team with the initial files which we can load into an alternative Environment and provide some initial verification of the files you have prepared.

> Guide Documentation - Flat File Import Guide

2.6 Customer Checklist

- Manage Users
- Manage Teaching Session records
- Manage School records
- Manage LTI Integration configuration records
- Undertake Flat File Imports