Onboarding Guide

This document provides the Project Team with details on the steps, timing and responsibilities for the implementation of eReserve Plus at an institution. It provides a clear way forward for all involved and identifies the resource required for a successful eReserve Plus implementation.

eReserve Project Team

The eReserve Project Team will work closely with Library Staff and IT staff to ensure a successful implementation of eReserve Plus for your specific needs. Implementation will draw on the considerable experience of the eReserve Project Team covering the import of your existing data, integration with key systems and training of your staff as needed.

The project team from eReserve during the Implementation will include:

CEO - Karey Patterson
karey@ereserve.com.au

Senior Customer Advocate - James Leese
james@ereserve.com.au

CTO - Michael Harrison
michael@ereserve.com.au

The technical support team is also on hand at support@ereserve.com.au. We recommend that you post your project communications directly to support as we use a support system that everyone can access which tracks all communications and ensures we are able to provide timely responses.

All customers will have access to the Support System at http://support.ereserve.com.au

Roles and responsibilities

We use a system called Pivotal Tracker which helps the eReserve Project Team work effectively with your team, enabling us to collaborate on project milestones and tasks and ensure everyone on the project has visibility of the work in progress, or completed.

This guide outlines the tasks required for deployment and recommends which team members are best placed to perform the work. Knowing this information upfront will help your team make decisions and assist with resource planning.

When commencing the project, we work with your Project Team to identify and assign effort in Pivotal Tracker which provides us with an accurate timeframe for delivery, based on identified effort for all stakeholders. This transparency is designed to support both Project Teams through the Onboarding Process.

Regular Project Meetings

Throughout the Onboarding and deployment process, the Customer Advocate will chair fortnightly meetings with your team to ensure that the implementation is on track and any blockages or materials are being worked on by all parties to ensure timely delivery and project success. The online meetings usually run for an hour at most, and are recorded for recording-keeping purposes.

Following Go-Live the online meeting frequency will change to a monthly meeting where the Customer Advocate will chair online meetings using a standing Agenda to ensure we can continue to service your Institution effectively:

- What has gone well this past period
- Outstanding Support Tickets
- eReserve Roadmap and enhancements

This approach will also ensure you are aware of new features and functions.

1. 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 to test adding resources to make sure that everything runs smoothly with no issues. It is also used 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/

You may also have opted to setup a Training Environment. We create a training environment in two ways; short-term spin-up instances or permanent environments. The training environment is in place to train end-users on a stable code base and dataset.

The first User that gets added to eReserve Plus has the role of User Manager assigned to them. This person can then add further users to the system as required.

> Please advise eReserve of the Domain Name your institution created
> Please advise eReserve of the first User Manager(s)

2. Configuration and Setup

There are a number of configuration elements required for both the eReserve Plus software itself, and for eReserve Plus to become part of the ecosystem of the Institution's other IT systems. Generally the configuration and setup tasks need to be applied to each environment i.e. Staging, Production, Training.

General practice is to apply all initial configuration and setup to the Staging environment for approval by the Product Owner prior to a release to Production.

This section of the Onboarding Guide is divided into two sections to assist the teams with assigning roles and responsibilities:

1. Configuration by the eReserve Team
2. Configuration by the Institution

Configuration elements recommended for the Institution are a guide only and the eReserve Team is able to assist wherever the technical resources at the Institution may not be available.

2.1 Configuration by the eReserve Plus Team

2.1.1 Environment Setup

As outlined earlier in Accessing eReserve Plus, the first task is for the eReserve Team to setup the environments. In order to do this:

> - Please advise eReserve of the Domain Name your Institution created
> - Please advise eReserve of the first User Manager(s)

2.1.2 Institution Name

The Institution name is used in the Copyright Notice which is displayed online when Academics and Students access a Reading from eReserve Plus and should be the legal name of your Institution

> - Please advise eReserve of the legal name of your Institution

2.1.3 Citation Styles

The Readings on a Course Reading List are presented to Students using Citation Styles. eReserve Plus uses the Citation Style Language (CSL) format to support different types of Citation Styles available and therefore supports over 850 Citation Styles. The APA (American Psychological Association, 6th edition) style is the default Citation Style in eReserve Plus.

Additional Citation Styles can be added by the eReserve Team when we are advised of your supported Citation Styles or provided with a link to the source Citation Style you would like in your eReserve Plus system.

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

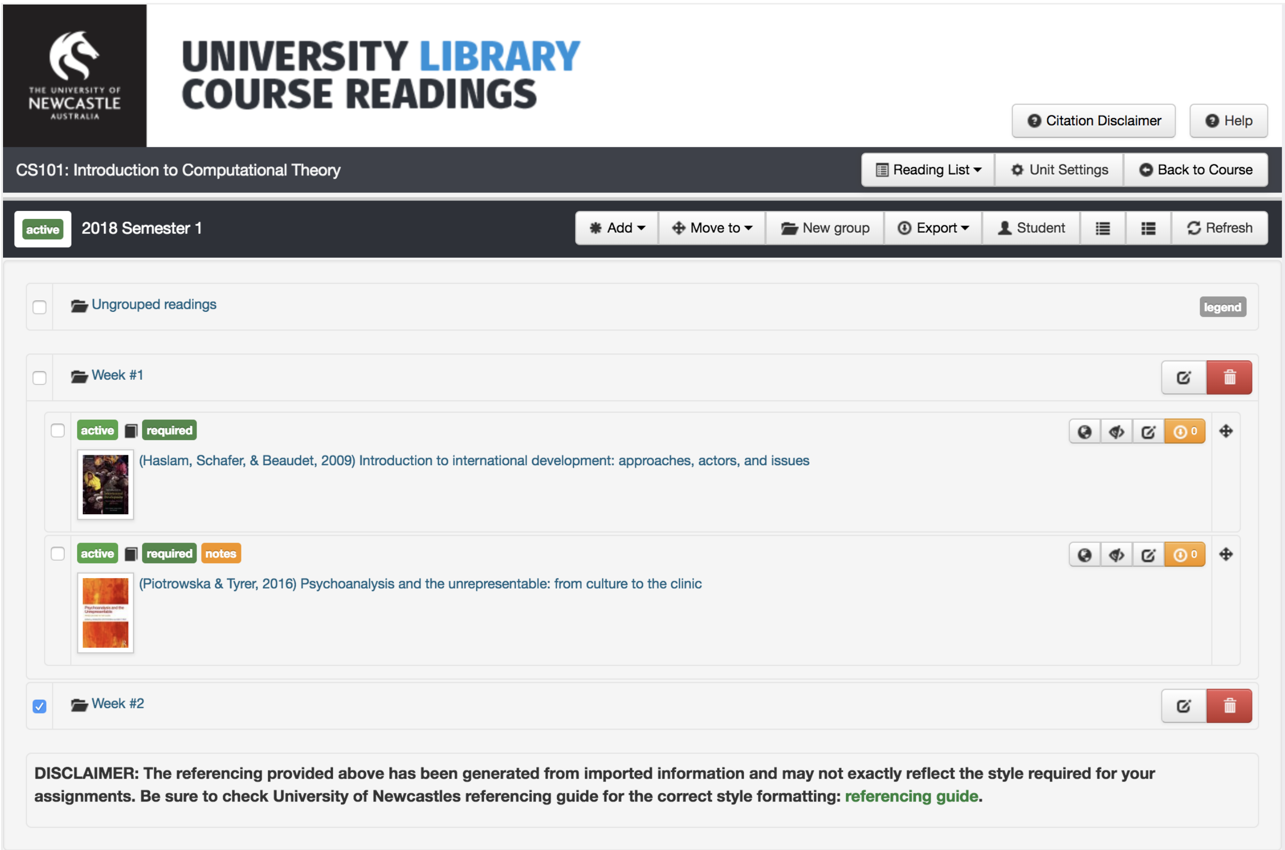
1. Visit https://www.zotero.org/styles
2. Use the search facilities to find your desired Citation Style
3. Hover over the style you want to use and a 'View Source' button will be displayed
4. Click on 'View Source'
5. The source for the style will be displayed and the URL will be displayed in the browser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

If a Citation Style is not available, the Citation Style editor can be utilised to create the 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 the list of Citation Styles to be employed, including a link to the source for each Citation Style (including any customised style that you may have adapted)

2.1.4 Theming

The Academic and Student Interfaces available from the Learning Management System can be styled by the eReserve Team to fit seamlessly with the look and feel of your Learning Management System.



> - Please provide any LMS style guide and screenshots so that the eReserve Plus theme framework can be amended

2.1.5 Email Customisations

Email confirmations are sent to Academics from eReserve Plus when Readings are added by RIS upload or when a Reading is rejected. There are a number of emails customisations that eReserve can configure for your Institution.

Firstly, the email template can be configured with standard content, and there are 3 sections available for customisation:

1. Content at the top of the page before the system generated message
2. An instructions line, and
3. The footer

> - You can view our KnowledgeBase Article about Email Customisations here

By default, eReserve Plus sends email notifications from the address: 'eReserve Team' noreply@ereserve.com.au
This can be amended for your Institution.

eReserve Plus also supports a Blind Carbon Copy (BCC) and Carbon Copy (CC) email address to be set that will receive a copy of all emails that are sent from the system to Academics. If set, this BCC and/or CC copy allows Admin staff to see the email activity sent to all Academic users of the system.

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 provide amendments to the Standard Email Template
> - Please provide eReserve with an email address that can be used as the sending address for email generated from the system
> - Please provide a BCC or CC email address (if applicable)
> - Please provide any third-party help/support email address

2.1.6 Integration of the Discovery Layer and Library System

Connecting eReserve Plus to your Catalogue or Discovery Tools is an essential way to leverage the capabilities of your existing systems in eReserve Plus and ensure that Academics utilise existing subscriptions and resources. Each supported Discovery System has its own integration configuration requirements covered in the documentation for each of the relevant integrations.

There is information that the eReserve Team requires to setup these integrations.

- Please supply the details for the Integration(s) required for your Institution

2.1.7 Summary Checklist

Please provide the eReserve Team with:

1. The Domain Name your Institution created
2. The first User Manager(s) details
3. The legal name of your Institution
4. The list of Citation Styles to be employed, including a link to the source for each Citation Style
5. Any LMS style guide and screenshots so that the eReserve Plus theme framework can be amended
6. A BCC email address (if applicable)
7. Any third party help/support email address
8. The details for the Search Integration(s) required for your Institution
9. An extract of the course codes from your LMS so eReserve can implement the Course Filters

2.2 Configuration and Setup by the Institution

2.2.1 User Setup

Once the initial User Manager(s) is setup, they can then create the other Admin Users in eReserve Plus. You do not need 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. Understanding what these roles are and how they are used will help you decide the appropriate level of access for each new user.

User Manager: This role gives the User the ability to create and manage User Accounts

Site manager: This role is for those people managing integration 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 includes access to Reporting (i.e. Audit and Utilisation) as well.

There are two additional Roles that are not enabled by default, but can be enabled on request. These two roles can be assigned to a user to enable them access and support the view normally associated with Academic and Student Roles.

Academic: This role allows Library and Support staff to test the Theme and Academic functions. A user would also be setup with this role for the email address to be used in Imports

Student: This role allows an Admin user to access the Student View for any Course and is primarily used for testing purposes.

> - Prepare a list of users for your Institution, their Roles and contact details
> - Access the Training documentation for User Management
> - Setup Users in eReserve Plus

2.2.2 Teaching Sessions

Teaching Sessions are typically configured by the Site Manager, Document Manager or the Copyright Officer and provide a set of standard dates for Reading List availability in the system.

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

It is common for these dates to be different from the actual Semester dates so that 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.

> - Prepare a list of Teaching Sessions for your Institution
> - Access the Training Documentation to configure Teaching Sessions
> - Configure Teaching Sessions in eReserve Plus

2.2.3 Schools

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

Users with Site Manager, Document Manager or Copyright Officer can configure the Schools, and later set the default Citation Style for each School once Citation Styles have been setup by the eReserve Team.

> - Prepare a list of Schools for your Institution
> - Access the Training Documentation for configure Schools
> - Configure Schools in eReserve Plus

2.2.4 Connecting the Learning Management System

Each Learning Management System at your Institution will need to be configured to use eReserve Plus using the IMS Global Learning Consortium's Tools Interoperability (LTI) protocol

An LMS Administrator or someone with the requisite permissions to configure LTI will need to be engaged.

An Important part of the LTI Setup is configuration of the Course Filters. The Course Code Filter allows each offering of a course in the LMS to match the Course Code for a Reading List in eReserve Plus. With the Course Code filter in place, eReserve Plus will be able to automatically associate existing Readings Lists to each new offering of the course using the unique Course Codes. If the Course Code Filter does not find a match then the Course Code will be derived exactly as it appears in the LMS. The Course Name Filter is utilised to strip the display of the course name from the LMS, where relevant.

A Systems Administrator with the requisite skillset can configure the Course Code Filter in eReserve Plus by providing the eReserve Team with a regular expression that identifies and matches course codes used by the Institution.

> - Extract Course Codes from your LMS for analysis by eReserve
> - Access the Training Documentation to configure the LMS
> - Access the Training Documentation to configure Course Filters
> - Configure LMS Integration for eReserve Plus
> - Install the LMS plugins for Resource Linking from eReserve Plus

- Provide Course Filter expressions

2.2.5 Summary Tasklist - Customers

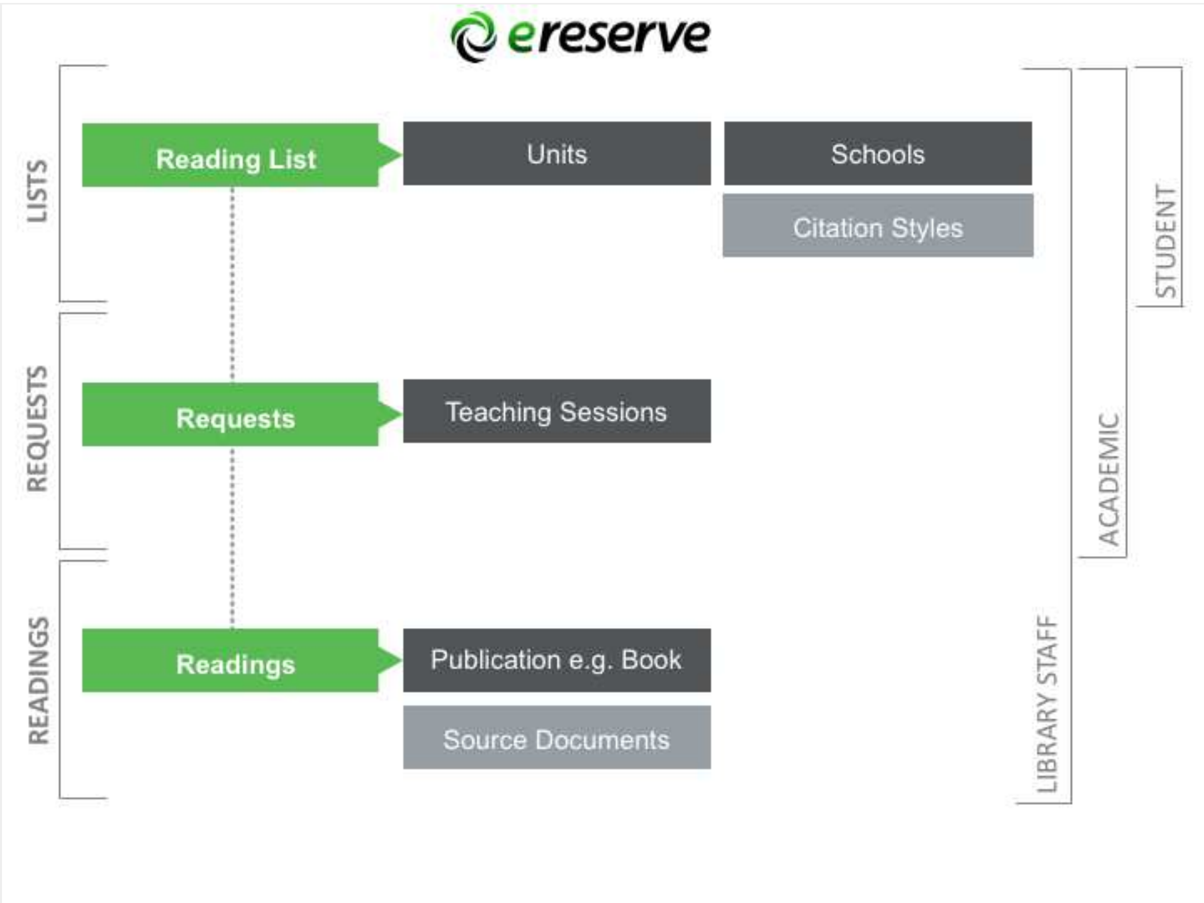
The tasklist below summarises the tasks noted in each section above:

1. Prepare a list of Users for your Institution, their Roles and contact details
2. Access the Training Documentation for User Management
3. Setup Users in eReserve Plus
4. Prepare a list of Teaching Sessions for your Institution
5. Access the Training documentation to configure Teaching Session records
6. Configure Teaching Sessions in eReserve Plus
7. Prepare a list of Schools for your Institution
8. Access the Training documentation to configure School records
9. Configure Schools in eReserve Plus
10. Extract Course Codes from your LMS for analysis by eReserve
11. Access the Training documentation to configure LMS
12. Access the Training documentation to configure Course Filters
13. Configure LMS Integration for eReserve Plus
14. Install the plugins for Resource Linking from eReserve Plus
15. Provide Course Filter expressions

3. Populating eReserve Plus with Data

The most significant aspect to Onboarding with eReserve Plus is Data Migration and the diagram below illustrates the logical data model for eReserve Plus. Identifying where existing reading list resources are located is the first step in the process to populate eReserve Plus with the following records:

- Courses
- Reading Lists
- Requests, and
- Readings.



During the Configuration and Setup phase, the following entities should already have been created:

> - Schools
> - Citation Styles
> - Teaching Sessions
> - Course Code Filter

Generally, the format, quality and location of your existing data will determine the mechanisms by which your Project Team will choose to migrate existing data. Institutions may elect to onboard resources by manually activating eReserve Plus for each course that Readings are being created for, and to leverage Citation Management Software such as Endnote and Zotero. In other instances Institutions may import tens of thousands of resources and these can be added using the Flat File Import mechanism.

The ways to initially populate the database for each entity are outlined below:

3.1 Courses

a. Flat File Import - Courses must be uploaded using the Course Import

3.2 Reading Lists

a. Manually - Reading Lists can be created manually by Academics or Library Staff
b. Flat File Import - Reading Lists can be uploaded using the Request Import.

Requests

a. Manually - Requests can be created manually by Academics or Library Staff, one Reading Request at a time.
b. Discovery Integration Layer - Requests can be created manually by Academics or Library Staff by searching the Discovery Layer, one at a time.

c. RIS File Import - Multiple Reading Requests can be created using an RIS File (just the metadata).
d. Flat File Import - Multiple Requests can be uploaded using the Requests Import (Mimicking an Academic). The Requests Import is a mechanism to combine the upload of Requests, Readings and Reading Lists in a single Flat File Import.

3.3 Readings

a. Manually - Readings can be created manually by Library Staff, one Reading at a time.
b. Discovery Integration - Reading records can be created manually by Academics or Library Staff by searching the Discovery Layer, one at a time.
c. Flat File Import - Multiple Readings can be uploaded using the Readings Import. Importing Readings in this way simply stores the Readings in the core repository for Academics to request post Go-Live.

3.4 Suggested Approach

Throughout the data migration exercise the eReserve team will be more than happy to coach your team through the process and help you select the approach that best suits your Institution.

We recommend initially trialling the population of data into the Staging environment where QA checks can be performed to ensure metadata is populating the correct fields in eReserve Plus.

Once the data migration process is proven the Production environment will need to be populated again using the chosen mechanism(s).