

A man in purple shorts is captured mid-air, jumping from a wooden pier into a vast blue lake. The sky is bright blue with scattered white clouds. In the background, a small boat with a person is visible on the water, and a white buoy floats nearby. The pier's wooden structure is prominent in the foreground and middle ground.

# Taking the Next Plunge: Managing a Full Steam Upgrade to LibApps

John Hernandez  
Web & Mobile Services Librarian  
Northwestern University

# Today's Talk Will Share...

- Our attempt to consolidate our subscriptions under LibApps
- Our overall upgrade plan and how that's gone so far
- What we've learned from the experience that might help you
- Where we hope to go next

# Northwestern University

- Private not-for-profit, Ph.D. granting institution
- 3 campuses: Evanston, Chicago and Doha, Qatar
  - 17,500 full-time and 4,300 part-time students
  - 9,050 undergrad and 12,750 graduate/professional
- Member of the Big Ten Academic Alliance (formerly the CIC)
- Quarter system
- Growing online programs
- Canvas course management system
  - Switched from Blackboard Fall 2015

# Northwestern University Libraries

- 75 librarians (40 subj specialists), 37 non-librarian, 101 support staff
- Evanston campus libraries:
  - Main Library (social sciences, humanities, digital collections, multimedia, Africana, transportation, government information)
  - Deering Library (art, music, special collections, archives)
  - Mudd Library (science, technology, engineering)
  - Math Library
  - United Library (Theological Seminary)\*
- Chicago campus libraries:
  - Schaffner Library (professional & continuing studies)
  - Pritzker Legal Research Center (Law School)\*
  - Galter Library (Medical School)\*
- Qatar campus library\*

# Springshare Products @NU

- Main Library adopted LibGuides in Summer 2008
  - Upgraded to LibGuides v2 (Fall 2014)
  - LibAnswers v1, LibCal v1, LibAnalytics (upgrading)
- Qatar library add-on to Main subscription
  - LibGuides & LibAnswers v1 (about to upgrade to v2)
- Separate subscriptions at Law, Medical, Business Career Center, and Theological Seminary libraries

# LibApps Suite for NUL

- LibGuides CMS
  - LMS integration (biggest selling point)
  - LibWizard Lite (for forms and surveys)
  - Mobile Site Builder (added extra)
- LibCal v2 (incl. MyScheduler for individual calendars)
- LibAnswers v2 (incl. LibChat)
- LibInsight Lite (formerly LibAnalytics)
- LibStaffer (desk management)





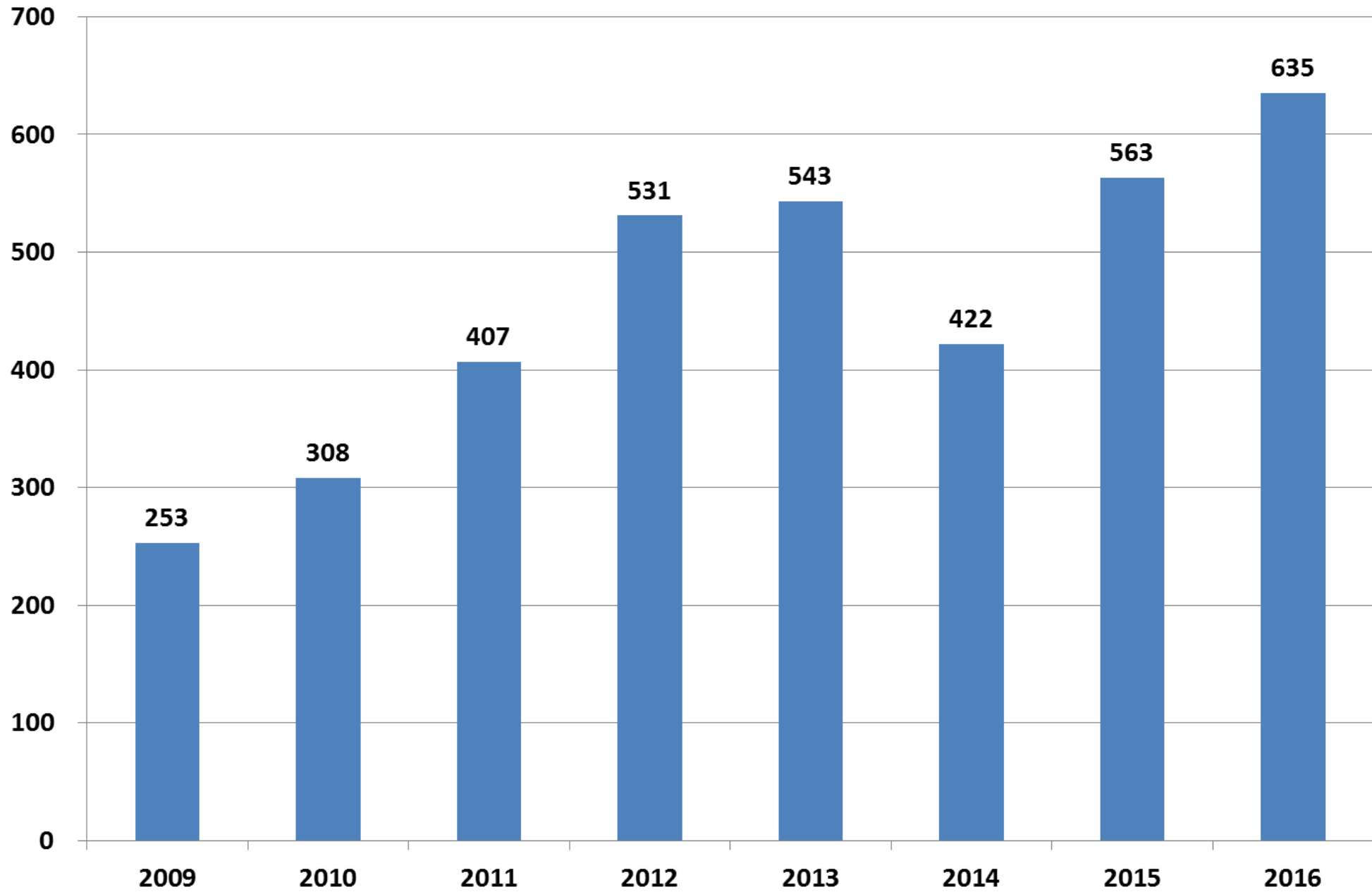
# Guide Trends

- Both number of guides and overall usage have been going up
- Course guides get disproportionately lower usage compared to subject guides
  - Subject guides serve wider audiences and are more general in scope
  - Fewer active course guides per quarter
  - Course guide creation driven by instruction and very few are posted in course sites
- Existence of guides not widely known, but when discovered they are universally appreciated



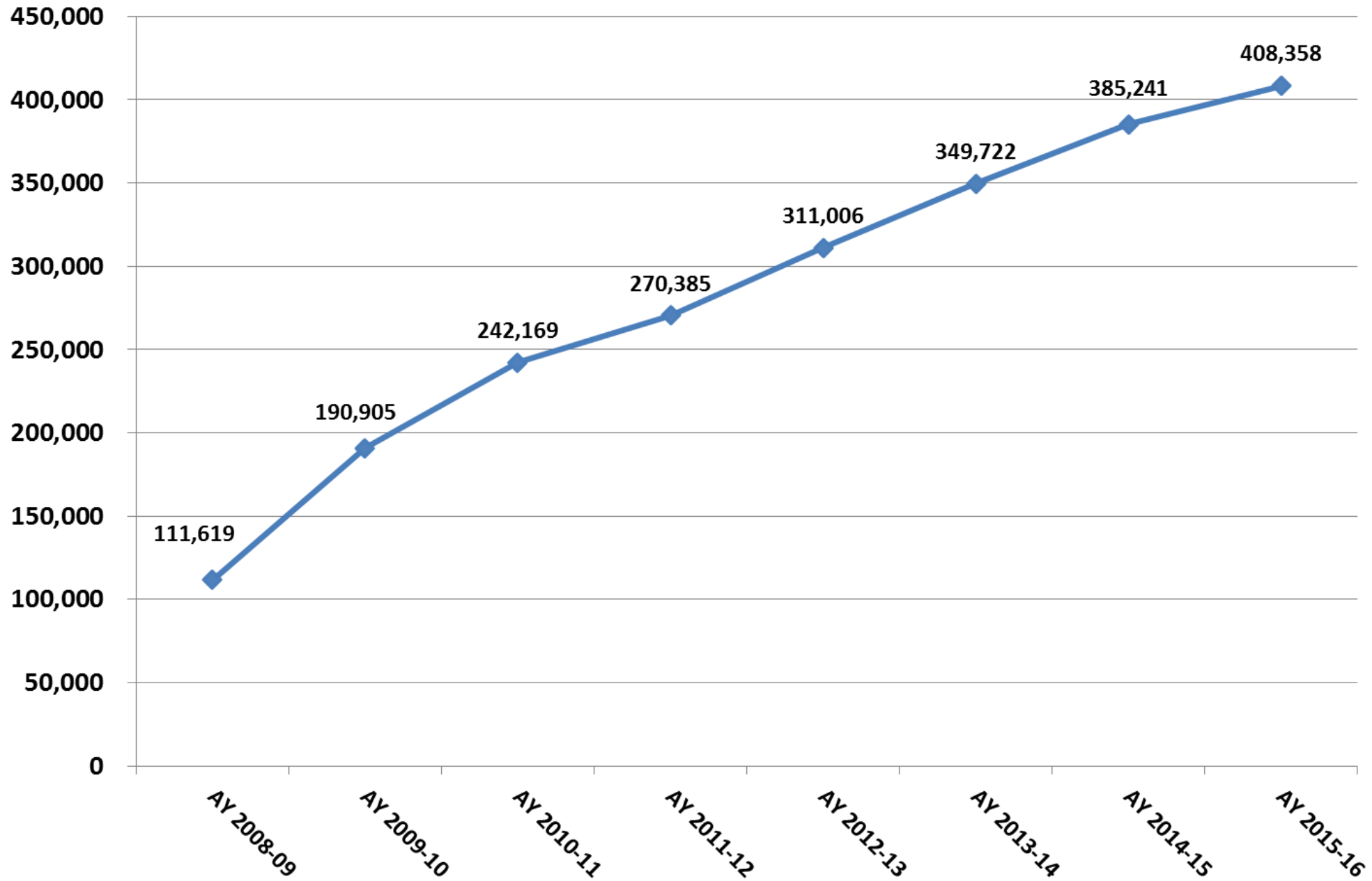
# Number of Published LibGuides

AY08-09 to AY15-16



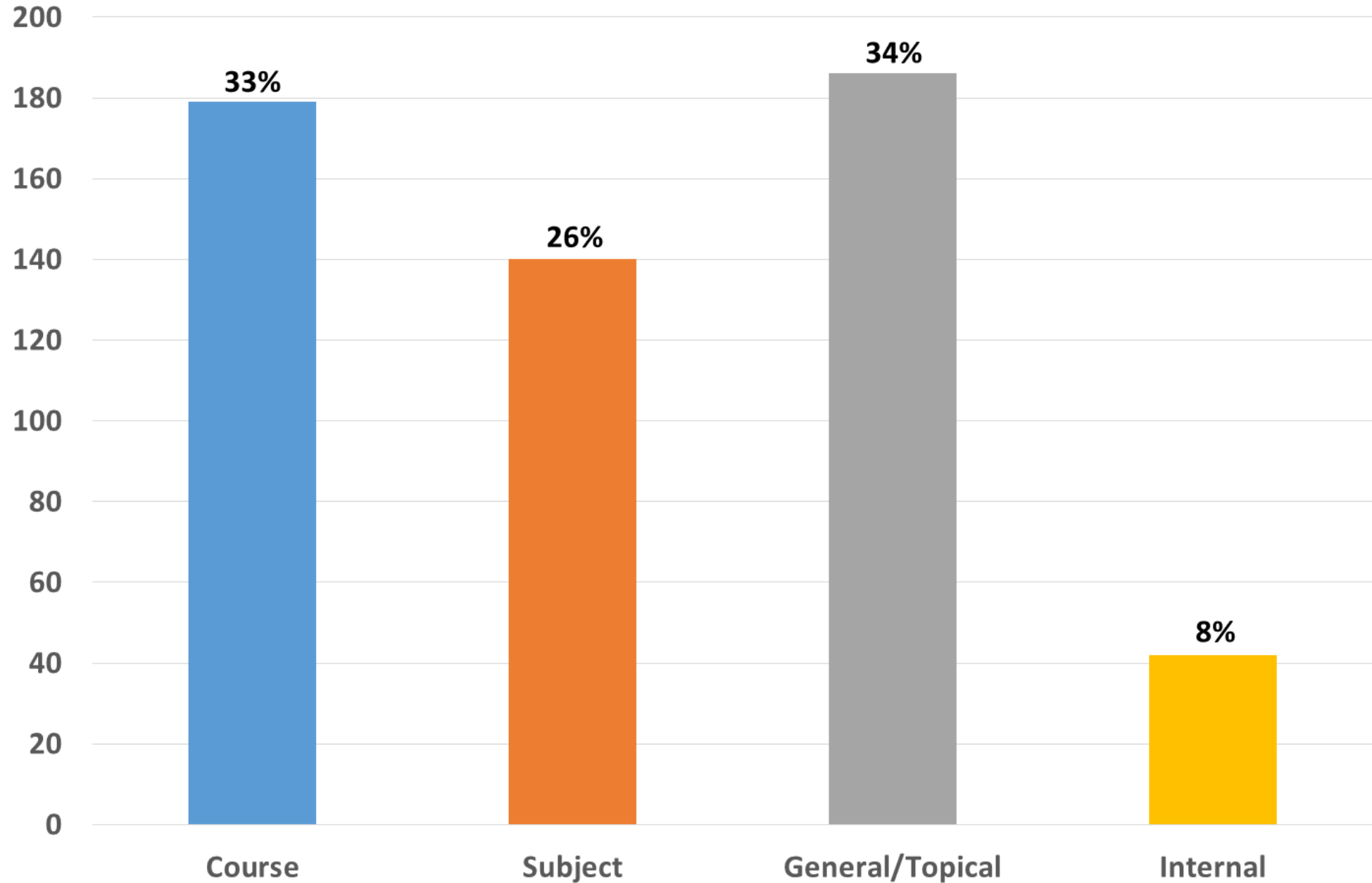
# Annual LibGuides Traffic

Visits AY2008-09 to AY2015-16



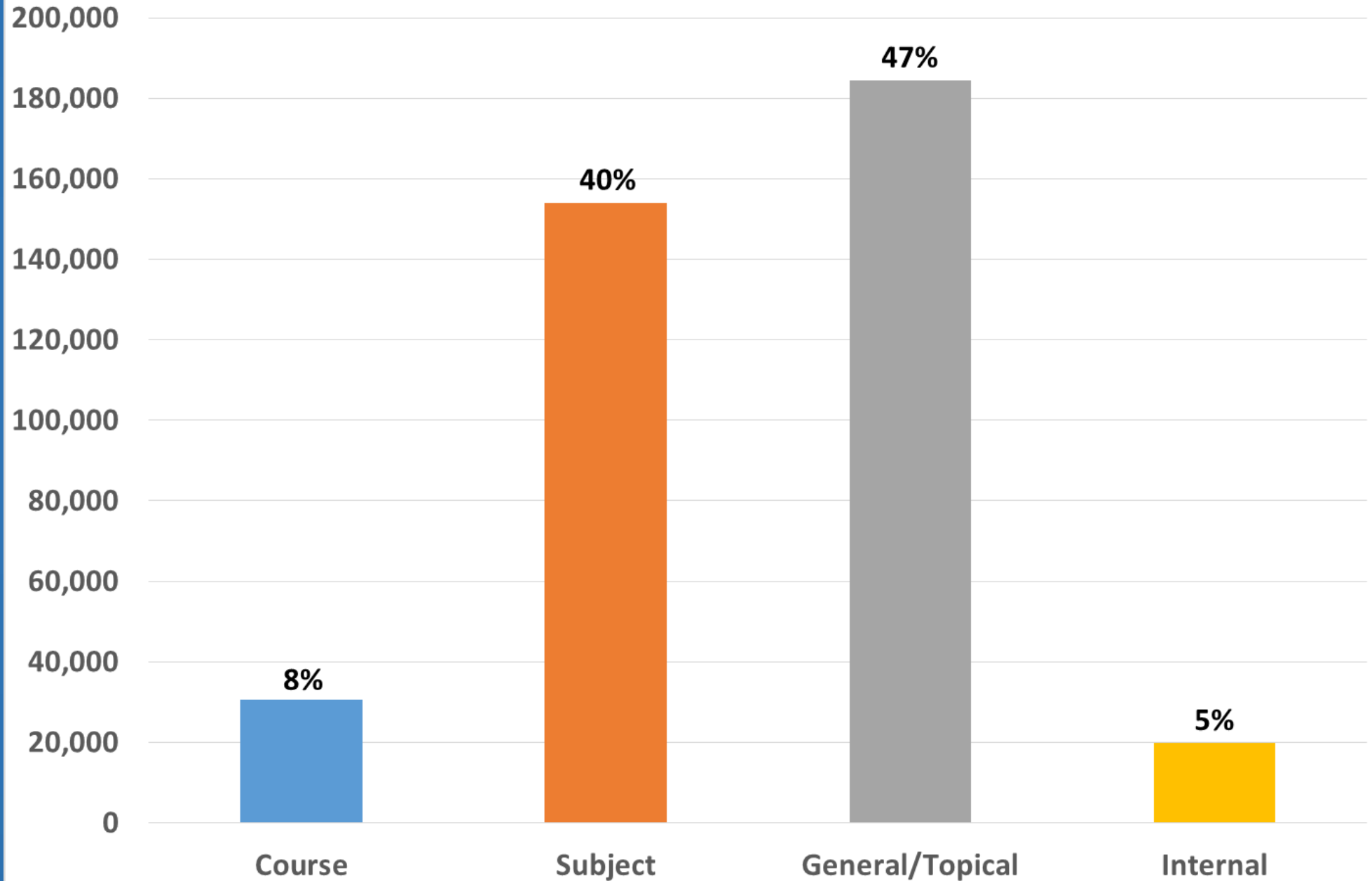
# Guides by Type

## AY 2015-2016



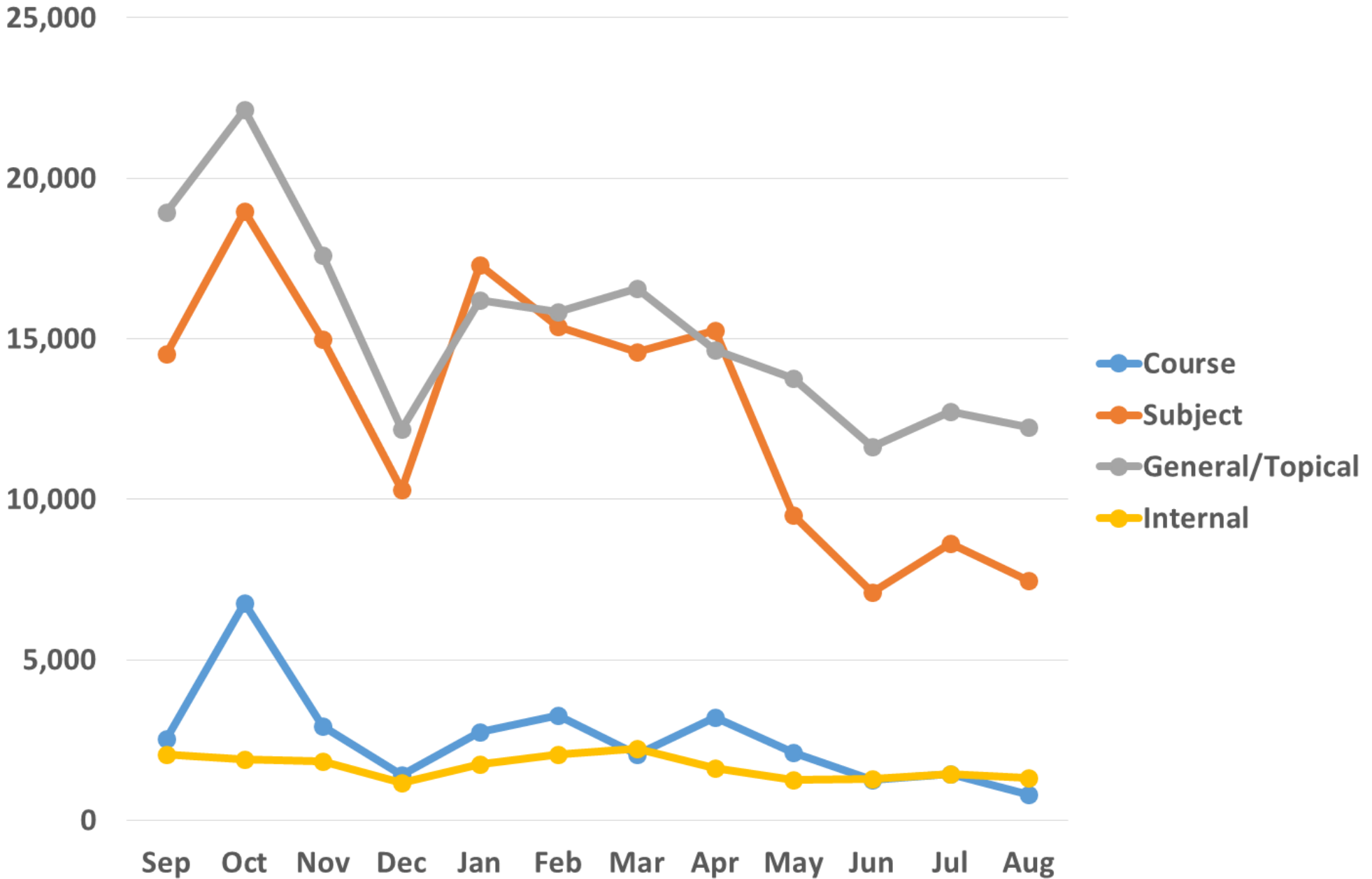
# Total Traffic by Guide Type

AY 2015-2016



# Monthly Traffic by Guide Type

AY 2015-2016



# Long Term Goals for LibGuides

- Increase awareness, usage and satisfaction
- Provide support for instruction and learning needs at the course level
- Match course content to appropriate resources, tools, and expertise
- Create more opportunities for faculty-librarian contact



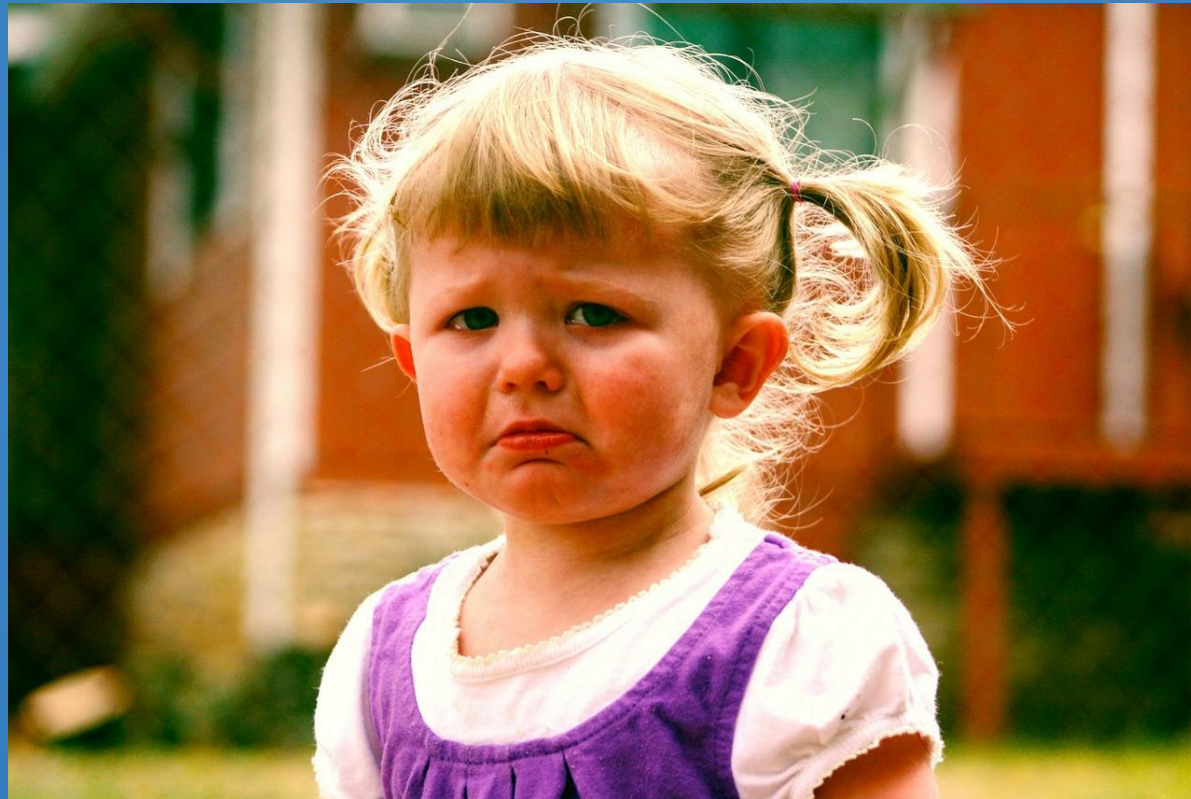
# Short Term Objectives

- Create an “opt-out” service for every course site in Canvas
- Promote the existence of course guides
- Drive greater use of course guides by making them available in the student environment
- Get more feedback from faculty
  - Encourage creation of more course guides
  - Ensure that guides really do meet needs

# A Few Setbacks



# Some Disappointments



# Many Lessons Learned



# Benefits of Consolidating

- Unify multiple existing subscriptions at NU
  - Law, medical, business career center, and remote campus at Qatar
- Upgrade all of our Springshare products at once
- Cost savings by moving from ala carte purchasing
- Combined administration - we're all one university after all
- Flexibility for individual presence



# Herding Cats





# Mission Not Quite Accomplished

- Law library decided to go it alone and build a new site
- Medical library decided to cancel subscription
- Business career center stayed with theirs for time being
- Main Library upgraded to LibApps in June 2016
  - Qatar campus library joined in
- May try to revisit again
  - Approach the Theological Seminary library





# LibGuides-Canvas Integration

- Library presence in course environment where students “live”
- Every course will have a “Library Help” link (except Law & Medical schools)
- LibGuides content pulled directly into course sites via LTI
- Increased usage of LibGuides
- Guide development to be driven by course needs

# What is LTI?

- LTI = “Learning Technologies Interoperability”
- Standard protocol for learning management systems to share information with other systems
- Developed by consortium of LMS vendors
- NUL uses LTI -compliant apps to deliver streamed video to Canvas course sites and facilitate course reserves

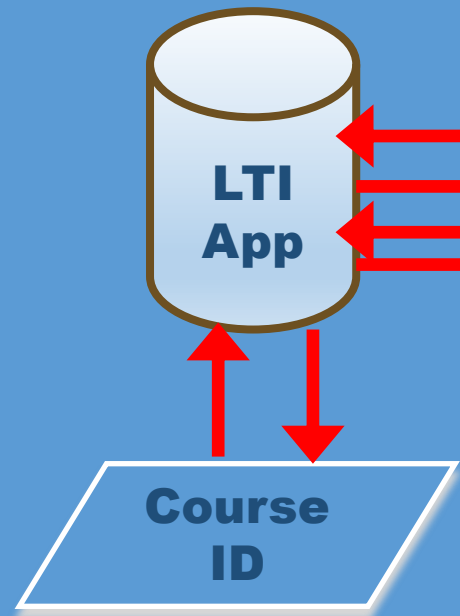


# Course to Guide Matching

- LTI tool uses the LMS' context\_label variable (course identifier string)
- Course ID string is mapped to custom metadata that gets added to guides and subject categories
- LTI tool finds match between course ID string and guide metadata
- Subject experts and databases are selected by match on subject metadata



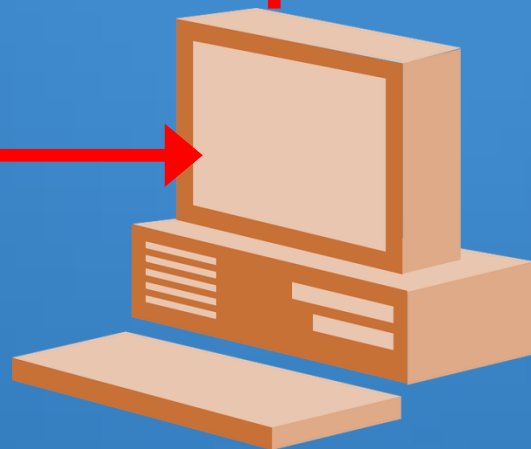
# CANVAS



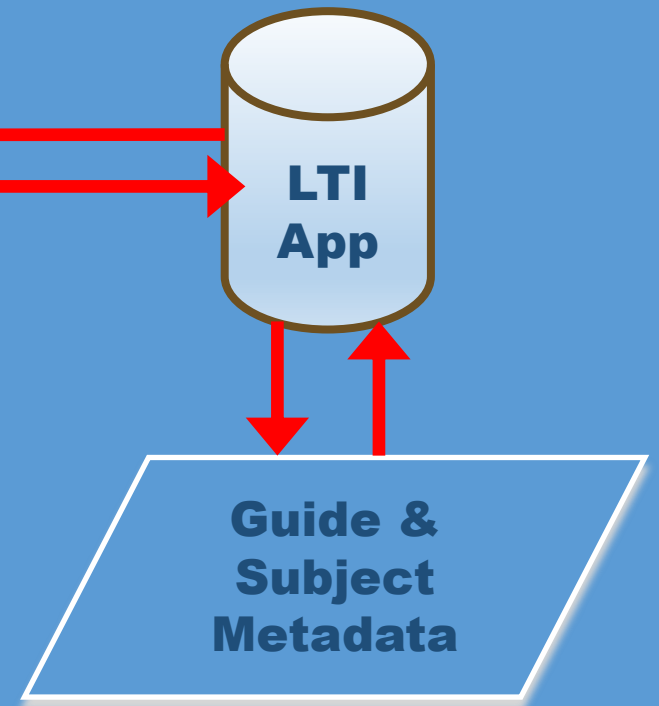
LTI app grabs the course ID

LibGuides LTI sends guide link, subject specialist info and databases link to Canvas LTI course ID to LibGuides LTI

Canvas LTI delivers links to user on LTI page in course site  
User clicks on "library help" link in course site



# LIBGUIDES



LTI compares course ID to LibGuides metadata



Account



Dashboard



Courses



Calendar



Inbox



Help

Prep Site Term

Home

Announcements

**Library Research Help**

Assignments

Discussions

Grades

People

Pages

Files

Syllabus

Outcomes

Quizzes

Modules

Conferences

Collaborations

Attendance

## Library Resources for CCS\_JJH996-A

### Counseling

#### A-Z Database List for Counseling

Full list of Databases to which the library subscribes, including trial access.

### Counseling Experts



John Hernandez

# Matching Techniques

- Stepped Search
  - Searching algorithm tries to match entire course ID string and if not successful removes one character at a time from the right until a match is found
  - Metadata value is left-anchored sub-string of the course ID
- Translation Table
  - Provides a one-to-one match of each individual course ID string with a specific metadata value that is assigned to guides and subjects

# Original Canvas Integration Plan

- Began conversations with Academic & Research Technologies manager during Summer 2016
  - Agreed to install LTI tool in all Canvas courses
  - Set for a mid-Fall 2016 launch
- All other work to be done by library staff
  - Advance work in finding matches between courses and guides/subjects
  - Follow-up work to modify or adjust guides
  - Primary contact for support questions



# IT Issues

- Unexplained delays to implementation
- Unforeseen difficulties with LTI function
  - Won't handle guides with redirects
  - More sub-account level installs
- Growing resistance to universal installation of LTI tool
  - Increased pressure to install other LTI tools and add more menu items to Canvas from other units
  - Concern that not all faculty would want the library tool
  - Misunderstandings about how guides are developed
  - Non-communication of critical feedback
- Refusal to install unless specifically requested





# Appeal to Higher Authority

- Asked head of UX to have meeting with A&RT manager
- We pleaded our case
  - Reminded that we had an agreement and work had already begun
  - Emphasized the importance of wide-spread installation
  - Presented guide usage data and evidence of benefits to going “opt-out” from other peers
- Head of A&RT decided to move the project forward after all



# Course Review & Analysis

- Reviewed Fall 2016 & Winter 2017 courses
- Data extract from Canvas for all courses (>4,000 each quarter)
- Several rounds of pairing course content to existing subject and course guides
  - Paired courses with existing course-specific guides
  - Most courses paired with corresponding subject guides
  - Some courses had to pair with special “landing page” guides
  - Consulted with subject specialists when needed
  - Created a few brand new guides (many more to come)

# Some Interesting Patterns

- Difficulties with course ID strings
  - Year-quarter numbering (i.e. “2016FA\_ECON\_101-6\_SEC20”)
- Recurring courses
- Cross-listed courses
- Courses that don't fit traditional library research mold
- Language instruction courses
- More exclusions for other academic programs

# Revised Canvas Plan

- Adjusted timeline
  - Treating this as a “pilot project” for Spring 2017
- Switched from Stepped Search to Translation Table
  - Avoid the year-quarter problem in course IDs
  - Better for handling cross-listed courses
  - Requires more work at start, but easier to maintain
  - Eliminates need to revise metadata
- Formal project plan with assessment component
- Security review
- Marketing plan

# LibCal v2

- Wanted to improve user experience
- Responsive design - good for mobile devices
- Recurring room bookings
- Went live in Fall 2016
  - Created new calendars instead of migrating existing ones
  - Improved graphic interface
  - Using in room reservation kiosk at One Button Studio
  - Evaluating for room kiosks at remodeled Mudd Library

# LibCal Before & After

- Old version 1 site: <http://972.v1.libcal.com/>
- New version 2 site: <http://northwestern.libcal.com>

# MyScheduler

- Manage individual meeting schedules
- Sync with Google and Outlook calendars
- Enhancement to research consultation request process
  - Coordinating with Reference Services Manager
  - Enabled for all subject specialists
  - Training began this month
  - Instant appointment confirmation - getting used to it
  - More direct contact with specialists, less triage
  - Will be added to Canvas integration



# LibAnswers v2

- Plan to go live in April 2017
  - Re-creating knowledge base instead of migrating
  - Streamlining question tags and eliminating duplication
  - Recruiting staff from service points to help maintain
- Interface improvements on front and back ends
- Group customization
- Option to add more answer queues
- Social media integration

# LibChat

- Fully integrated into LibAnswers v2
- Ability to create departments for better chat management
- Replacing current LibraryH3lp service for ref chat
- Training begins in March
- Widget will be added to Canvas integration

# LibInsight Lite

- New version of LibAnalytics product
- Upon consultation with Assessment Librarian, we decided to hold off on migrating for the time being
- Purchased option for up to 20 datasets
  - All have to be manually customized
- May consider going with full version
  - Several pre-configured templates
  - Hoping for more direct streams from other Springshare products
- Qatar campus librarian is experimenting with it

# LibStaffer

- Desk schedule manager
- Essentially came free as part of the LibApps suite
- We had a trial before but were not particularly impressed
- Will review again to see if we might use it for reference desk scheduling
- Qatar campus library seeking a centralized desk scheduler, so they are reviewing it and may adopt ahead of Main



# Wisdom Gleaned - LibApps Consolidation

- Cost savings
  - Pricing for LibApps suite is better than ala carte
  - If multiple subscriptions already exist, Springshare will preserve revenue by charging for each academic unit under LibApps
- A-to-Z Database Library could be tricky for campus-specific or school-restricted resources
- CMS provides multiple groups with individual look and feel
- LibCal is currently limited to one time zone



# Wisdom Gleaned - LMS Integration

- Sweet talk, bribe, cajole, etc. your IT folks
- Face time with IT folks is very important
- Draft a project plan with clear expectations about work responsibilities and timelines
- Get intimate with your LMS data architecture and course identifier patterns
- LTI tool may have to be installed in several LMS sub-accounts
- Develop a marketing campaign and assessment strategy

# Springshare Products Advisory Team

- Include representatives from across the library (and Qatar)
- Communicate with various library stakeholders
- Keep informed about developments at Springshare and peer institutions
- Encourage and evaluate new ideas
- Evaluate and prioritize further modifications
- Manage user testing and feedback

# Staff Forums

- Get work done and do training
- Promote new features
- Communicate design and service philosophies
- Ask questions and give feedback
- Share snacks







# Thanks!

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