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.

Working Together = Success

During onboarding eReserve will partner and work with your Product Owner to create a collaborative onboarding team made up of staff from the institution and eReserve. The onboarding team's collective effort will ensure we achieve project goals through open communication, shared responsibility, and iterative meetings every two weeks. The onboarding process enables the team to adapt to change, solve complex problems, and deliver value iteratively, on time and on budget.

Our onboarding approach, with short two weekly iterations, allows the team to ensure regular and controlled milestone delivery, adapt to changes and adjust as needed to meet the needs of your institution.

How collaboration works between eReserve and Institutions during onboarding:

The Product Owner

The Product Owner is the key contact person, and decision maker from the institution. The Product Owner works in collaboration with the eReserve Customer Advocate, who is the primary manager of the onboarding process and coordinator of the project, and is responsible for decision making, review and acceptance of delivered work during the project. The Product Owner works with the eReserve Customer Advocate to ensure the team focuses on the most important work, aligning the project goals, timeframes and project needs. The process is one of collaboration, communication and partnership.

Part of the Product Owner's responsibility is to identify the staff at their institution who are best suited for participation during onboarding and to be assigned tasks within ClickUp along with attending the fortnightly meetings. The onboarding process supports the inclusion and involvement of key team members to ensure timely project delivery.

The Onboarding Team

The team will be composed of staff from eReserve and key staff from your institution. The team will work together, overcoming any issues that arise and fostering a collaborative process to ensure project success.

Transparency and communication

Our onboarding model emphasises transparency through regular meetings (every two weeks), encouraging open communication and information sharing and use of a project tracking and management tool (ClickUp). Each member of the team from your institution who are participating in onboarding, will be provided with a ClickUp account. The ClickUp system used to manage onboarding provides all team members a clear and transparent system for communicating, asking questions, prioritising and reduces the reliance on email and ensures the project is on track and meeting the milestones as needed. The process and approach help identify and address potential risks early in the onboarding process and in an ongoing manner to keep onboarding on schedule.

Onboarding Timeframe

Typically eReserve Plus onboarding (including data migration, setup of staging and production instances, theming, configuration and training) has 5 key project milestones and takes 90 days. Onboarding is managed via a regular schedule of meetings every two weeks during the project. The team work together using the onboarding system tools, such as ClickUp, to achieve the project milestones. All team members can quickly determine current goals, next stages of work, communicate via ClickUp and identify any blocks or aspects of onboarding that require assistance to meet milestones.

Onboarding can be completed in under 90 days but will require tight collaboration and agreement between the eReserve Plus Customer Advocate and the institution's Product Owner. Discussion, collaboration and negotiation are required to accurately and mutually determine project goals, what can or cant be completed by a specified date and overall timeframes. Shortening the implementation timeframe from the standard 90 days will require consideration of the impact on such factors as the amount of data that can be processed, number of courses that are scheduled in the first cohort, the approach taken to feature configuration or other factors and will require discussion with and agreement and collaboration between the Product Owner and Customer Advocate.

Data in Staging vs Data in Production

Test data and data generated in training in staging should not be added to production under any circumstances. Staging is used to test new features, train staff and verify data. We strongly advise that training be conducted in the staging environment only and that test data is not added or used in production as that will skew the reliability and accuracy of production analytics and copyright reports.

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:

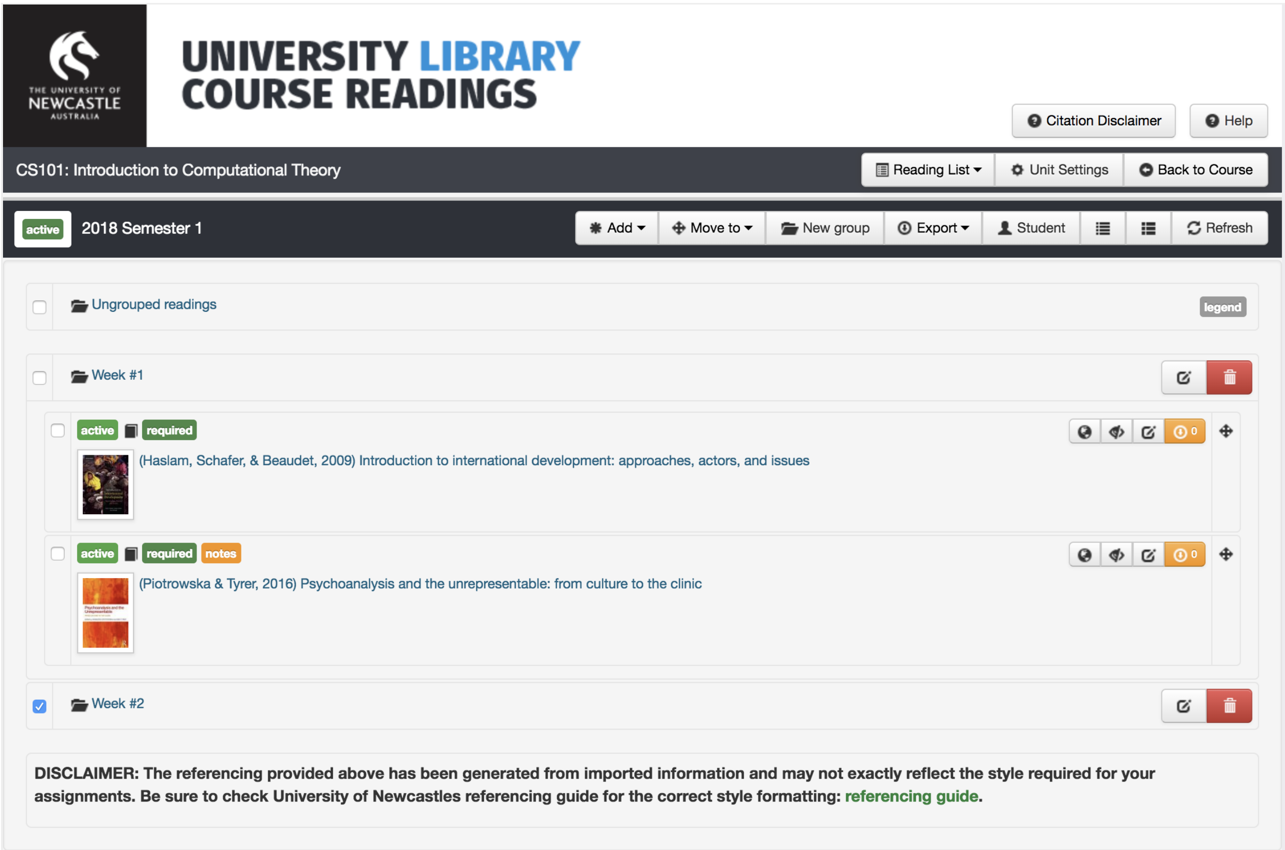
1. Visit https://www.zotero.org/styles
2. Use the search facilities to find your desired Citation Style
3. Hover over the style you want to use and a 'View Source' button will be displayed
4. Click on 'View Source'
5. The source for the style will be displayed and the URL will be displayed in the browser 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. An extract of the course codes from your LMS so eReserve can implement the Course Filters
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. The Domain Name your Institution created

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

2.2.4.1 The Importance of Course Codes and Automated Matching

There are two critical parts of onboarding where we require the customer to provide materials early on in the onboarding process.

These are:

1. Supply and analysis of course codes in the Learning Management System/Virtual Learning Environment (LMS/VLE);
2. Supply of course reading list content (existing course reserve and lists).

Why Course Codes are Important

Units (courses) and reading lists in eReserve Plus are linked to LMS/VLE offerings via their unit/course code LMS/VLE codes that include clearly defined units and timeframes for the offering are easy to match to units and reading lists in eR+. Without correct configuration of a unit code filter, matching student and learning management is unlikely and integration the LMS/VLE will be blocked. eReserve Plus features such as auto-publish of a reading list cant be used unless unit code filter has been completed and the ability to compare analytics for a course or unit from one time period to another wont be possible.

- Check the eReserve Plus help guides for your Learning Management System/ Virtual Learning Environment

- Course code exports from LMS/VLE provided to your onboarding team will be reviewed and a Unit Code Filter developed that will automatically match reading lists to courses/units offered in LMS/VLE. Click here to find details on how the unit filter is developed

2.2.5 Summary Tasklist - Customers

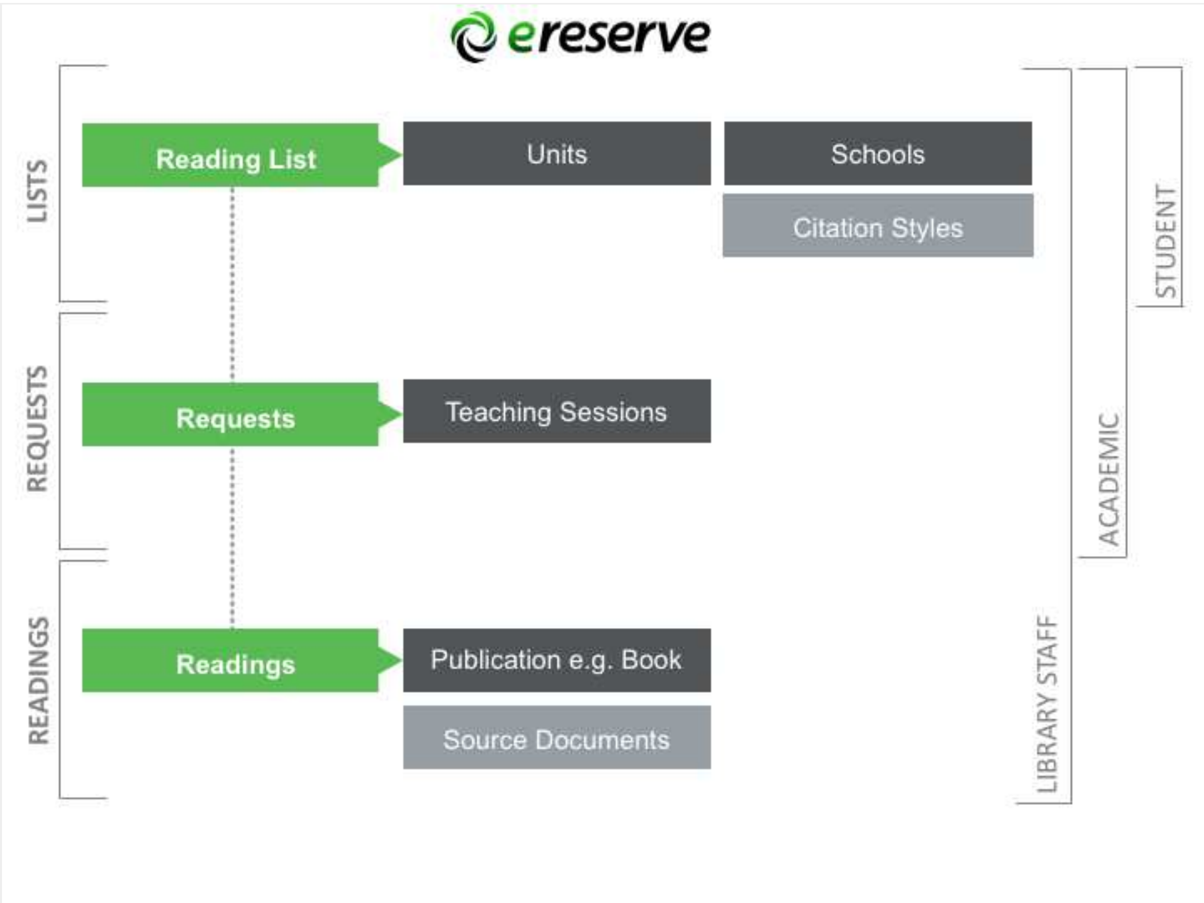
The tasklist below summarises the tasks noted in each section above:

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).