

Automation Team and Team Leader Charge

Individuals are designated as primary contacts/experts/consultants for the existing Voyager functional areas -- Circulation, Acquisitions/Serials, Catalog and Database Maintenance, and OPAC and End User. In addition, Interlibrary Loan, and the Technical Team should utilize the same charge for all areas that are applicable.

Guiding Principles

- All teams will abide by the "Guiding Principles for Automation Teams" and may develop (as appropriate) mission statements for their individual modules.

Training/Orientation

- The Director of Systems/CUL ISS will coordinate Team Leaders and Back-up Leaders, facilitate their training, and determine when it is desirable for them to meet as a group.

Meetings/Meeting Frequency

- Monthly for each Team. Each individual team will schedule regular team meetings at least monthly and cancel them only if there are no agenda items for that month.
- Team Leaders quarterly with the Automation Technology Steering Committee (normally 2nd Friday of the month in November, February, May, August). All Team Leaders will meet on a quarterly basis with the Automation Technology Steering Committee at their regular meeting to report on the activities of their teams during the past quarter, to discuss and present recommendations to ATSC, and to assure that there is regular cross-team communication.
- Team leaders will meet as a group when planning for upgrades and when determining upgrade acceptability and should meet at other times as needed.
- Other meetings scheduled as necessary, depending upon the nature and urgency of issues to be considered.
- Team members should request additional meetings, including cross-team meetings, as needed and should utilize electronic means of communications.
- All teams will practice effective meeting management including clear establishment of the method for coming to agreement on recommendations -- consensus, bringing in stakeholders, popular vote/input, user input/testing, team member votes.
- Ground rules will be established to assure effective communication and conflict resolution.

Minutes/Documentation

- All team recommendations must be documented in the minutes for team meetings.
- Minutes from all team meetings shall be posted to the T shared drive by each team (example -- T:\Libraries\Voyager Teams\OPAC Team\Minutes\).
- A message with a copy of the minutes in the body of the email message and the location of the minutes on the T shared drive will be sent out after each team meeting to the smulibs list. The only exception will be if the file size of the email message containing the minutes and any attachments are too large for the list software to handle. In that case, some information may have to be referenced by its location on the T drive.
- Any system-wide configuration or SMU local customizations will be documented and stored on the T: shared drive.

Project Coordination

- Teams will submit top priority projects for their modules to the Library System Office.
- In October of each year, each Team Leader will provide a list of current and pending projects to the Library Systems Office and their incoming Team Leader.
- Project lists should include project target dates and the status of each item to assure a smooth transition when the leadership of the team changes **annually on November 1**.

Skills Required

Team Leaders shall be skilled in:

- Using the functional module for which they have been designated
- Use of effective problem-solving and troubleshooting skills
- Use of electronic communications (electronic mail, local listserv, telephone calling groups, shared network drives, etc.)

Communication/Accountability/Feedback

- Each team member has been appointed to fulfill an important role for the SMU Libraries automation program and their full participation is critical to the success of the automation system.
- Each Team Leader will communicate regularly to team members and other teams as appropriate and maintain a current list of campus library contacts for their area of responsibility, using currently available communication links (electronic mail, local listserv, telephone calling groups, shared network drives, etc.).
- All team members will respond by requested deadlines to all communications from ATSC, Library Systems staff, and team leaders.
- ATSC members for each library will be kept informed of any communications issues and will hold team members from their libraries accountable for full active participation on teams.
- All team members are charged with keeping coworkers informed of automation system issues in their areas.
- All team members are charged with establishing methods for assuring that users (faculty, students, and staff) have methods to provide input into proposed system changes as appropriate and to provide additional feedback after changes are made.
- Methods for feedback from users must include procedures for communicating this information to all team members and to ATSC for consideration.

Problem Reporting/Verification

Each Team Leader will:

- Receive reports of problems in the appropriate system module.
- Coordinate the verification, testing, and investigation of the problem, before forwarding it to the Systems Office.

The Systems Office will:

- Coordinate resolution of the problem, perhaps by forwarding the report to Ex Libris, other automation vendors and/or ITS.
- Determine when a reported problem or issue should be brought before the Automation/Technology Steering Committee.

New Feature Research and Recommendation

Responsibilities include:

- Investigating and researching new features available in upgrades prior to the upgrade date.
- Making team recommendations to ATSC for utilizing any new features.
- Recommending changes available with an upgrade.

Utilization of Resource Staff

- Teams may recommend appointment of small groups of resource staff outside the team membership to investigate new features, develop and perform usability testing, configure user-defined upgrade features, or for other specific areas as needed.
- Appointments of resource staff members will be cleared through the ATSC and accountability for participation of those resource staff members will be through ATSC members of individual libraries.

Upgrade Testing & Evaluation

- During system upgrades and patches, the Team Leaders will coordinate timely testing, evaluation, and reporting of any problems.
- Each team is responsible for developing, updating, and maintaining test scripts for their module for use during testing, including adding tests for any planned utilization of new features.

Back-up Leaders

- Each Team agrees to recommend to ATSC one or more formal backup leaders and report the name of the backup(s) to the Director of Library Systems/CUL ISS.
- These backup team leaders will be kept informed of all issues by the Team Leaders and will serve as backup team leaders performing the duties and responsibilities of team leadership as required.
- After serving as Back-up Team leader for one year, the Back-up Team Leader will serve as the Team Leader the following year. The change will take place on November 1 of each year.

Coordination Across Modules

- All teams and ITS and Systems staff members are charged with responsibility for coordinating and notifying other teams of changes that impact other modules, including PONI files.

Time Requirement

- Staff serving as team leaders will require a certain amount of released time from their primary work assignments.
- They may need special training in varying degrees.

Members:

Selection of Team Members/Term Team Members Serve:

- The Council of Library Directors (COLD) appoints the members from a list of candidates prepared by the Automation/Technology Steering Committee and will decide upon the length of service of their appointees. These appointments are reviewed annually in October and new terms start November 1 of each year.

Composition of Team leaders and back-up leaders from the following areas:

- Acquisitions/Serials
- Catalog and Database Maintenance
- Circulation
- End User
- Interlibrary Loan Technical Team

Acquisitions/Serials Team and Team Leader Responsibilities

Important Note: [Team Leaders](#) guide the team in this effort; however, the responsibilities of the Team are the shared responsibility of all team members. [Team Leaders](#) will notify back-up team leaders if they will be on vacation or out of town. [Back-up team leaders](#) will then be responsible for running the team.

Review Voyager-L for your functional area

- Discuss messages that are of general interest to your group
- Note and communicate important upcoming activities
- Review and discuss issues reported on Voyager-L related to acquisitions and serials.
- Record and report to Systems Office staff problems reported in your area of functional responsibility
- Recommend and implement, as appropriate, solutions suggested for your area of functional responsibility
- Report suggestions for enhancements to Systems Office

Become expert in the setup of your area of functionality

- Know all different records in Acquisitions/Serials module
- Know what kind of information is represented in each record
- Know how to find up-to-date information about items. Examples: Is an item on order, has it been received, has it been claimed, invoice status
- Know how search types work in all areas of acquisitions: purchase orders, invoices, publication patterns, vendor records, ledgers, funds, and routing lists
- Use Excel reports provided by Systems Office
- Know and practice all areas of serials functionality
 - Patterns
 - Receipt
 - Claiming and Problems Lists
- Develop a thorough understanding of the relationship between serials and acquisitions, cataloging, and OPAC display
- Know how workflow in other modules affects procedures in Acquisitions/Serials

Address functional problems

- Attempt to duplicate reported problems. Determine if the problem is unique to one location or occurs across all SMU libraries.
- Search the Ex Libris Knowledge Base Bugs & FAQ to see if anyone else has reported the same problem
- Write up problems and questions (with appropriate supplementary information or documentation) to send to the Systems Office. The Systems Office will then forward them to Ex Libris.
- Report the status of problems to all Team members who will relay the information to the appropriate people in their libraries.
- Increase awareness of functionality that you do not regularly use in your area of responsibility. . Examples could be new functionality in a planned release or functionality used in one library but not another.

Coordinate upgrades and changes to the module or workflow

- Help people who work in your area of responsibility be informed about the upgrade implementation schedule: timing and impact
- Develop a training program to ensure staff who work in functional area are familiar with all new enhancements relevant to acquisitions/serials functionalities before the upgrade by having team members study release notes and documentation prior to upgrade and schedule use of the preview server
- Get testing commitments from other team members and staff as appropriate
- Develop detailed scripts
- Coordinate testing of all old and new functionalities by use of test scripts. Examples: Creating and updating purchase orders, creating and approving invoices, searching and creating vendors
- Assign who will be testing what and when
- Report any problems to the Systems Office immediately

- Keep team members aware of the status of reported problems
- Develop training for acquisitions/serials staff if appropriate
- During system upgrades, the Team Leaders will coordinate testing, evaluating, and reporting any problems. This may include making recommendations to ATSC for utilizing any new features or recommending changes available with an upgrade.

Regular activities

- Exchange ideas in order to educate each other regarding workflow, enhancements, and implementation of new features.
- Experiment in order to encourage efficiencies in your functional area.
- Notify the OPAC team of any changes that impact PONI files. This responsibility needs to be shared by the Acquisitions/Serials Team and the Systems staff, if they make the changes
- Review displays in PONI which may be affected by some changes in procedures
- Review changes in PONI which may affect procedures
- Review processes in circulation which may affect procedures
- Review processes in acquisition which may affect bibliographic records
- Be responsive to questions, concerns from all other teams
- Monitor PeopleSoft Financials interface
- Monitor vendor file to assure integrity.
- Monitor processes in cataloging which may affect acquisitions procedures

Perform general communication liaison duties

- The goal of communication is to work together as a team: encourage the fertilization of ideas, experimentation, and the discussion of alternative viewpoints.
- Develop modes of communication that encourage participation
- Share problems, issues or highlights of your work with the ATSC
- Work together to develop feedback about the module and to make recommendations that affect functionality
- Inform Systems Office when members should be added or removed
- Poll the team members for feedback and recommendations
- Write up formal team responses to the ATSC when team recommendations are made to ATSC, when ATSC charges a team with a specific task, when upgrade decisions are being made, or when teams are asked for their recommendations by ATSC.
- Perform liaison duties during upgrade periods
- Coordinate Fiscal Year Close testing and activities with team members and designated ITS staff members.

Catalog and Database Maintenance Team and Team Leader Responsibilities

Important Note: [Team Leaders](#) guide the team in this effort; however, the responsibilities of the Team are the shared responsibility of all team members. [Team Leaders](#) will notify back-up team leaders if they will be on vacation or out of town. [Back-up team leaders](#) will then be responsible for running the team.

Review Voyager-L for your functional area

- Discuss messages that are of general interest to your group
- Note and communicate important upcoming activities
- Review and discuss issues reported on Voyager-L related to cataloging and authority control
- Record and report to Systems Office staff problems reported in your area of functional responsibility
- Recommend and implement, as appropriate, solutions suggested for your area of functional responsibility
- Report suggestions for enhancements to Systems Office

Become expert in the setup of your area of functionality

- Know all different records in Cataloguing module
- Know what kind of information is represented in each record
- Know how to find up-to-date information about items. Examples: Is an item still on order, is it in process, has it been already cataloged and when.
- Know how search types work
- Know how workflow in other modules affects procedures in Cataloguing

Address functional problems

- Attempt to duplicate reported problems. Determine if the problem is unique to one location or occurs across all SMU libraries.
- Search the Ex Libris Knowledge Base Bugs & FAQ to see if anyone else has reported the same problem
- Write up problems and questions (with appropriate supplementary information or documentation) to send to the Systems Office. The Systems Office will then forward them to Ex Libris.
- Report the status of problems to all Team members who will relay the information to the appropriate people in their libraries.
- Increase awareness of functionality that you do not regularly use in your area of responsibility. . Examples could be new functionality in a planned release or functionality used in one library but not another.

Coordinate upgrades and changes to the module or workflow

- Help people who work in your area of responsibility be informed about the upgrade implementation schedule: timing and impact
- Develop a training program to ensure staff who work in functional area are familiar with all new enhancements relevant to cataloging and authority work functionalities before the upgrade by having team members study release notes and documentation prior to upgrade and schedule use of the preview server
- Get testing commitments from other team members and staff as appropriate
- Develop detailed scripts
- Coordinate testing of all old and new functionalities by use of test scripts. Examples: Download/overlay bibliographic record from OCLC, edit fixed and variable fields, create holdings record, create item record, create authority record, check links to authority records, test all search types, check the information on indexes, etc.
- Assign who will be testing what and when
- Report any problems to the Systems Office immediately
- Keep team members aware of the status of reported problems
- Develop training for catalogers if appropriate
- During system upgrades, the Team Leaders will coordinate testing, evaluating, and reporting any problems. This may include making recommendations to ATSC for utilizing any new features or recommending changes available with an upgrade.

Regular activities

- Exchange ideas in order to educate each other regarding workflow, enhancements, and implementation of new features.

- Experiment in order to encourage efficiencies in your functional area.
- Notify the OPAC team of changes that impact PONI files. As a specific example, Marc tags were updated, but since the information wasn't shared with the OPAC team, changes weren't made in appropriate keyword search configurations. This responsibility needs to be shared by the Cataloging Team and the Systems staff who are making the changes (not all come directly from cataloging staff).
- Review displays in PONI which may be affected by some changes in cataloging procedures
- Review changes in PONI which may affect cataloging procedures
- Review processes in circulation which may affect database maintenance
- Review processes in acquisition which may affect bibliographic records
- Be responsive to questions, concerns from all other teams

Perform general communication liaison duties

- The goal of communication is to work together as a team: encourage the fertilization of ideas, experimentation, and the discussion of alternative viewpoints.
- Develop modes of communication that encourage participation
- Share problems, issues or highlights of your work with the ATSC
- Work together to develop feedback about the module and to make recommendations that affect functionality
- Inform Systems Office when members should be added or removed
- Poll the team members for feedback and recommendations
- Write up formal team responses to the ATSC when team recommendations are made to ATSC, when ATSC charges a team with a specific task, when upgrade decisions are being made, or when teams are asked for their recommendations by ATSC.
- Perform liaison duties during upgrade periods

Circulation Team and Team Leader Responsibilities

Important Note: [Team Leaders](#) guide the team in this effort; however, the responsibilities of the Team are the shared responsibility of all team members. [Team Leaders](#) will notify back-up team leaders if they will be on vacation or out of town. [Back-up team leaders](#) will then be responsible for running the team.

Review Voyager-L for your functional area

- Discuss messages that are of general interest to your group
- Note and communicate important upcoming activities
- Review and discuss issues reported on Voyager-L related to circulation
- Record and report to Systems Office staff problems reported in your area of functional responsibility
- Recommend and implement, as appropriate, solutions suggested for your area of functional responsibility
- Report suggestions for enhancements to Systems Office

Become expert in the setup of your area of functionality

- Know all different records in Circulation module
- Know what kind of information is represented in each record
- Use Excel reports provided by Systems Office
- Gradually develop a general idea of what goes where. Examples:
- How many days does a book stay on the hold shelf at Hamon?
- What loan period do Guest Grad patrons get at Underwood?
- Can a Colophon patron place a recall at ISEM?
- Can my student assistants collect fines?
- My books are coming due on Sunday, but we're closed on Sunday, aren't we?
- Know how to find up-to-date information about items
- Know how search types work
- Know how workflow in other modules affects procedures in Circulation

Address functional problems

- Attempt to duplicate reported problems. Determine if the problem is unique to one location or occurs across all SMU libraries.
- Search the Ex Libris Knowledge Base Bugs & FAQ to see if anyone else has reported the same problem
- Write up problems and questions (with appropriate supplementary information or documentation) to send to the Systems Office. The Systems Office will then forward them to Ex Libris.
- Report the status of problems to all Team members who will relay the information to the appropriate people in their libraries.
- Increase awareness of functionality that you do not regularly use in your area of responsibility. . Examples could be new functionality in a planned release or functionality used in one library but not another.

Coordinate upgrades and changes to the module or workflow

- Help people who work in your area of responsibility be informed about the upgrade implementation schedule: timing and impact
- Develop a training program to ensure staff who work in functional area are familiar with all new enhancements relevant to circulation work functionalities before the upgrade by having team members study release notes and documentation prior to upgrade and schedule use of the preview server
- Get testing commitments from other team members and staff as appropriate
- Develop detailed scripts
- Coordinate testing of all old and new functionalities by use of test scripts. Coordinate testing all old and new functionality by use of test scripts. Examples: Check out a book, put a book on reserve, Update a patron, Place a hold, etc.
- Assign who will be testing what and when
- Report any problems to the Systems Office immediately
- Keep team members aware of the status of reported problems
- Develop training for circulation staff if appropriate
- During system upgrades, the Team Leaders will coordinate testing, evaluating, and reporting any problems. This may include making recommendations to ATSC for utilizing any new features or recommending changes available with an upgrade.

Regular activities

- Review regularly scheduled activities to make sure they happen
 - Patron loads
 - Cashier Transfers
- Exchange ideas in order to educate each other regarding workflow, enhancements, and implementation of new features.
- Experiment in order to encourage efficiencies in your functional area.
- Notify the OPAC team of changes that impact PONI files. This responsibility needs to be shared by the Circulation Team and the Systems staff, if they are making the changes.
- Review displays in PONI which may be affected by some changes in circulation procedures
- Review changes in PONI which may affect circulation procedures
- Review processes in circulation which may affect database maintenance
- Review processes in acquisition which may affect bibliographic records
- Be responsive to questions, concerns all other teams

Perform general communication liaison duties

- The goal of communication is to work together as a team: encourage the fertilization of ideas, experimentation, and the discussion of alternative viewpoints.
- Develop modes of communication that encourage participation
- Share problems, issues or highlights of your work with the ATSC
- Work together to develop feedback about the module and to make recommendations that affect functionality
- Inform Systems Office when members should be added or removed
- Poll the team members for feedback and recommendations
- Write up formal team responses to the ATSC when team recommendations are made to ATSC, when ATSC charges a team with a specific task, when upgrade decisions are being made, or when teams are asked for their recommendations by ATSC.
- Use email list (circtf@mail.smu.edu) as one means of communication to those on circulation list
- Perform liaison duties during upgrade periods

Interlibrary Loan Team and Team Leader Responsibilities

Important Note: [Team Leaders guide the team in this effort; however, the responsibilities of the Team are the shared responsibility of all team members. Team Leaders will notify back-up team leaders if they will be on vacation or out of town. Back-up team leaders will then be responsible for running the team.](#)

Review ILLiad-L and Voyager-L regularly for your functional area

- Discuss messages that are of general interest to your group
- Note and communicate important upcoming activities
- Review and discuss issues reported on Voyager-L related to interlibrary loan
- Record and report to Systems Office staff problems reported in your area of functional responsibility
- Recommend and implement, as appropriate, solutions suggested for your area of functional responsibility
- Report suggestions for enhancements to Systems Office

Become expert in the setup of your area of functionality

- Know all different modules in ILLiad: borrowing, lending, electronic delivery.
- Know what kind of information is represented in each record
- Know how to find up-to-date information about requests.
- Develop a thorough understanding of the relationship between Voyager and ILLiad.
- Make time to practice functionality that you do not regularly use in your area of responsibility
- Know how workflow in other modules affects procedures in interlibrary loan.

Address functional problems

- Attempt to duplicate reported problems. Determine if the problem is unique to one location or occurs across all SMU libraries.
- Check to see if anyone else has reported the same problem
- Write up problems and questions (with appropriate supplementary information or documentation) to send to Atlas Systems
- Keep team members aware of the status of reported problems
- Report the status of problems to all Team members who will relay the information to the appropriate people in their libraries.
- Increase awareness of functionality that you do not regularly use in your area of responsibility. . Examples could be new functionality in a planned release or functionality used in one library but not another.

Coordinate upgrades and changes to the module or workflow

- Help people who work in your area of responsibility be informed about the upgrade implementation schedule: timing and impact
- Develop a training program to ensure staff who work in functional area are familiar with all new enhancements relevant to interlibrary loan work functionalities before the upgrade by having team members study release notes and documentation prior to the upgrade
- Get testing commitments from other team members and staff as appropriate
- Develop detailed scripts
- Coordinate testing of all old and new functionalities by use of test scripts
- Assign who will be testing what and when
- Report any problems to the Systems Office immediately
- Keep team members aware of the status of reported problems
- Develop training for interlibrary loan staff if appropriate
- During system upgrades, the Team Leaders will coordinate testing, evaluating, and reporting any problems. This may include making recommendations to ATSC for utilizing any new features or recommending changes available with an upgrade.

Regular activities

- Exchange ideas in order to educate each other regarding workflow, enhancements, and implementation of new features.
- Experiment in order to encourage efficiencies in your functional area.
- Review processes that may affect database maintenance.

- Share problems, issues or highlights of your work with the ATSC
- Be responsive to questions, concerns from all other teams

Perform general communication liaison duties

- The goal of communication is to work together as a team: encourage the fertilization of ideas, experimentation, and the discussion of alternative viewpoints.
- Develop modes of communication that encourage participation
- Share highlights of your work with the ATSC
- Work together to develop feedback about the module and to make recommendations that affect functionality
- Inform Systems Office when members should be added or removed
- Poll the team members for feedback and recommendations
- Write up formal team responses to the ATSC when team recommendations are made to ATSC, when ATSC charges a team with a specific task, when upgrade decisions are being made, or when teams are asked for their recommendations by ATSC.
- Perform liaison duties during upgrade periods

END USER TEAM

TEAM AND TEAM LEADER RESPONSIBILITIES

VISION: To effectively meet user needs by increasing SMU Libraries' collaboration and communications in order to provide access to shared resources.

NOTE: This charge replaces the previous "OPAC and End User Team and Team Leader Responsibilities" document, but does not replace the "Automation Team and Team Leader Charge" that applies to all Automation Teams.

Scope of the End User Team:

The SMU End User Team, composed of representatives from all SMU Libraries, oversees the public face of these shared SMU Libraries web services: OPAC, Summon/Discover SMU Libraries, and the SMU Online Resources pages. Specifics of the End User Team's scope include the following:

- The End User Team assumes responsibility for user/usability testing of mobile skins related to these three products, but not strategy relating to mobile skins and applications, nor for testing the mobile interface of every database linked from the OR.
- The End User Team assumes responsibility for communicating and conferring with web designers/developers about the usefulness of web design and content from the End Users' perspective related to the three products listed above.
- The various Reference departments across campus are responsible for collaborating and setting policy about the most effective means of funneling users to the correct virtual Reference channels. The End User Team will participate in communication aimed at improving any

funneling systems once they are put in place, as well as helping test these systems to determine their effectiveness from the End Users' perspective.

- The EU Team is responsible for upgrades and changes for the Voyager OPAC, Summon, and the Online Resources, to the extent that we have control over these products. The SMU Libraries web page is not included in this charge.

Structure:

The EU Team will be headed by two co-leaders, will meet quarterly to discuss ongoing projects, and will communicate frequently between meetings. The co-leaders will divide responsibilities based on their respective interests and skill sets. Each year one co-leader will rotate off, leaving an experienced co-leader and adding a new co-leader. A rotation of co-leaders will be suggested by the EU Team and approved by ATSC. The EU Team sub-groups, consisting of standing committees and task forces as yet to be named, will each meet monthly and will be responsible for work related to specific products or projects. One example of this would be a standing committee on usability testing. Other standing committees will follow as the new organization gets underway. The task forces will be formed and dispersed on an ad hoc basis. Because of the large scope of the proposed team, members from outside the EU team may be needed for specific projects. Approval for these assignments will be sought through ATSC, which would communicate with the individual's supervisor as appropriate.

Communication:

To facilitate early communication within each library at all levels, as well as efficient decision making, the chain of communication should work as follows:

- Proposals from task forces or individual EU Team members should be communicated to all of the EU Team members.

- Before a proposal is made to ATSC, EU Team members should discuss it in their regular management meetings, and/or with others in their libraries who would be affected by the decision, including their ATSC representatives and library directors. The BIC representative will discuss the proposal with the BIC CoLD member, as BIC lacks representation on ATSC. If the EU Team members do not meet regularly with their CoLD representative, then they should ask their ATSC member to communicate the information to the CoLD representative. This method of communication should occur early in the process.
- When it is time to refer a decision to ATSC, the EU Team representative for the project or the task force will prepare a document to submit for consideration. The representative will be prepared to attend the ATSC and/or CoLD meeting if requested. Alternatively, the EU Team leaders can request that they be allowed to attend the portion of ATSC and/or CoLD meetings where their proposals are being discussed.
- The EU Team will communicate its proposals to ATSC, which has the responsibility to refer them to CoLD as appropriate.
- To expedite the decision-making process, CoLD members have agreed to appoint a backup for occasions when they will be out of the office for extended periods.
- CoLD requests for the EU Team should be channeled through ATSC.

Responsibilities of the EU Team Co-Leaders:

Team Co-Leaders guide the Team, however, the responsibilities of the Team are shared by all team members. Co-Leaders will notify each other if they will be out of the office so that the counterpart can be responsible for running the Team.

Coordinate communication between the EU Team and other interested parties.

- Review appropriate resources for the library products.

- Note and communicate important upcoming action items.
- Submit proposals to ATSC.
- Report problems to library systems office.

Coordinate upgrades and changes to the web products.

- Inform the EU Team about the upgrade implementation schedule.
- Get testing commitments from other team members and staff as appropriate.
- Report any problems to library systems office immediately.
- Keep team members aware of the status of reported problems.

Collective Responsibilities of the EU Team

Team members contribute according to their area of expertise.

Develop knowledge of how the EU products work.

Examples include:

- Know how workflows in different areas of the libraries affect the products.
- Become familiar with possible error messages users may encounter.
- Become familiar with available product log files.
- Know how search types work.

Prioritize and address problems.

- Attempt to duplicate reported problems. Determine if the problem is unique to one location or occurs across all SMU Libraries.
- Document and submit problems and questions to the library systems office.
- Report the status of problems to the appropriate people in their libraries.

- Search the available knowledge bases and listserv archives.

Regular activities:

- Notify other teams of changes that impact web products.
- Respond to questions and concerns from all other teams.
- Develop and implement detailed test scripts.
- Participate in task forces as assigned.

Revised 1/24/2011

~~OPAC/End User Team and Team Leader Responsibilities~~

~~Important Note: Team Leaders guide the team in this effort; however, the responsibilities of the Team are the shared responsibility of all team members. Team Leaders will notify back-up team leaders if they will be on vacation or out of town. Back-up team leaders will then be responsible for running the team.~~

~~Review Voyager-L for your functional area~~

- ~~Discuss messages that are of general interest to your group~~
- ~~Note and communicate important upcoming activities~~
- ~~Review and discuss issues reported on Voyager-L related to the OPAC~~
- ~~Record and report to Systems Office staff problems reported in your area of functional responsibility~~
- ~~Recommend and implement, as appropriate, solutions suggested for your area of functional responsibility~~
- ~~Report suggestions for enhancements to Systems Office~~

~~Become expert in the setup of your area of functionality~~

- ~~WebVoyage files that most impact functionality of the OPAC include:
 - Local directory: webvoyage.ini, opac.ini, displayn.cfg, emailn.cfg, saven.cfg, search.ini
 - WebVoyage directory: html directory (includes Help directory, images directory, and the main WebVoyage page, webvoy.htm)~~
- ~~Develop knowledge of how the OPAC works. Examples include:
 - Know how holds and recalls work for various patron groups
 - Know how workflow in other modules affects the OPAC: i.e. URLs in holdings and bibliographic records, adding e-items to Course Reserve records, processing information that should appear in OPAC holdings records, Systems Administration settings that affect OPAC, etc.
 - Become familiar with possible error messages users may encounter and learn why they may appear
 - Become familiar with OPAC log files and coordinate with the OPAC team sampling periods during the year when the log should be turned on for capturing snapshots of usage. Communicate these time periods to the Systems Office so this can be scheduled with ITS.~~
- ~~Know how search types work~~
- ~~Know how workflow in other modules affects the OPAC~~

~~Address functional problems~~

- ~~Attempt to duplicate reported problems. Determine if the problem is unique to one location or occurs across all SMU libraries.~~
- ~~Search the Ex Libris Knowledge Base Bugs & FAQ to see if anyone else has reported the same problem~~

- Write up problems and questions (with appropriate supplementary information or documentation) to send to the Systems Office. The Systems Office will then forward them to Ex Libris.
- Report the status of problems to all Team members who will relay the information to the appropriate people in their libraries.
- Increase awareness of functionality that you do not regularly use in your area of responsibility. Examples could be new functionality in a planned release or functionality used in one library but not another.

~~Coordinate upgrades and changes to the module or workflow~~

- Help people who work in your area of responsibility be informed about the upgrade implementation schedule: timing and impact
- Develop a training program to ensure staff who work in functional area are familiar with all new enhancements relevant to OPAC functionalities before the upgrade by having team members study release notes and documentation prior to upgrade and schedule use of the preview server
- Get testing commitments from other team members and staff as appropriate
- Develop detailed scripts
- Coordinate testing of all old and new functionalities by use of test scripts. Check to see that old and new functionality works as expected. Perform searches to see if old functionality still works. Examples: Search with various limits set, search periodical titles with multiple holdings, test all search types (title left-anchored, title keyword, author authority, author keyword, series titles, etc.).
- Assign who will be testing what and when
- Report any problems to the Systems Office immediately.
- Keep team members aware of the status of reported problems
- Develop training for OPAC users as appropriate
- During system upgrades, the Team Leaders will coordinate testing, evaluating, and reporting any problems. This may include making recommendations to ATSC for utilizing any new features or recommending changes available with an upgrade.

~~Regular activities~~

- Exchange ideas in order to educate each other regarding workflow, enhancements, and implementation of new features.
- Develop new services.
- Notify other teams of changes that impact PONI and other modules. This responsibility needs to be shared by the OPAC Team and the Systems staff, if they are making the changes.
- Review displays in PONI which may be affected by some changes in cataloging procedures
- Review changes in PONI which may affect cataloging procedures
- Review processes in circulation which may affect database maintenance
- Review processes in acquisition which may affect bibliographic records
- Be responsive to questions, concerns from all other teams.

~~Perform general communication liaison duties~~

- The goal of communication is to work together as a team: encourage the fertilization of ideas, experimentation, and the discussion of alternative viewpoints.
- Develop modes of communication that encourage participation
- Share problems, issues or highlights of your work with the ATSC
- Work together to develop feedback about the module and to make recommendations that affect functionality
- Inform Systems Office when members should be added or removed
- Poll the team members for feedback and recommendations
- Write up formal team responses to the ATSC when team recommendations are made to ATSC, when ATSC charges a team with a specific task, when upgrade decisions are being made, or when teams are asked for their recommendations by ATSC.
- Perform liaison duties during upgrade periods

~~Spearhead OPAC user education and development of user education literature needed by all SMU Libraries by notifying and working with the User Education librarians to produce PONI help guides and web screens.~~

Technical Team and Team Leader Responsibilities

Important Note: Team Leaders guide the team in this effort; however, the responsibilities of the Team are the shared responsibility of all team members. Team Leaders will notify back-up team leaders if they will be on vacation or out of town. Back-up team leaders will then be responsible for running the team.

Individuals are designated as primary contacts/experts/consultants for their respective libraries – CUL – Fondren Library Center complex, Hamon, Bridwell and Underwood. In addition, as part of their regular position responsibilities, representatives from Information Technology Services and the Systems Office are designated as key contacts for the team. Appointees shall be skilled in areas related to personal desktop computers (both hardware and software) and networks. This group serves as a distributed deployment team for Voyager and other shared library software technical responsibilities.

- Voyager Upgrades/patches
The Technical Team Leader and Back-up Leader, in close consultation with designated representatives of ITS and the Systems Office are responsible for developing a basic understanding of the work to be accomplished, for customizing Ex Libris supplied instructions for upgrading/patching Voyager clients and for facilitating the team implementation of the clients through to the completion of the work. Each party is accountable to respond to each other in a timely manner.
 1. Designated ITS staff members download the Voyager upgrade clients, preview server clients, or client patches and Ex Libris supplied instructions and provide this information to the Technical Team leaders and the SMU Libraries Systems Office staff.
 2. Systems Office staff members review the information, gather feedback (as appropriate) from the Voyager functional teams to determine whether patches are needed and communicate this information to the designated ITS staff members and Technical Team leaders.
 3. Technical Team leaders:
 - create the instructions customized for the SMU installation.
 - anticipate questions from the team.
 - walk through the procedures and test them (if possible).
 - provide customized instructions to the designated ITS staff members for review.
 4. Designated ITS staff members review customized instructions and sign off on them and clarify any questions from the Technical Team leaders with Ex Libris.
 5. Technical Team leader: coordinates and communicates to all team members, and the SMU Director of Library Systems, the specific instructions for the work to be accomplished; responds to any questions and coordinates responses from the ITS Technology Group, or Systems staff as needed; and follows up with Tech Team members to ensure that client installations are completed within the assigned target date. The Technical Team leader drives the process.
- Technical Team Leader coordinates with Technical Team members to ensure that:
 1. an inventory of Voyager related computer equipment (PC's, receipt printers etc.) for his/her library of responsibility is maintained and reported if needed to the Systems Office.
 2. software or software upgrades related to the Library System or software shared across libraries are installed as needed for his/her library of responsibility. Examples: Voyager, PrintNow, MacroExpress, Observer.
 3. no additional Voyager clients are loaded without Systems Office approval due to contract/licensing restrictions.
- The Technical Team may make hardware or software recommendations to ATSC or recommend technical changes available or required with an upgrade.
- Starting in 2003, the Technical Team rotates team members to serve as team leaders and back-up leaders. A rotation list is available each year with the team member roster.