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Using Google Calendar as an Email Alert System for Electronic Resource Renewals

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Abstract

This article describes an innovative and simple way for libraries to generate email reminders for the renewal and payment of electronic resources using Google Calendar. The advantages of using Google Calendar include cost (it's free) and ease of use. Setting up an email alert system using Google Calendar enables librarians to track and manage their electronic resources more effectively.

It is common for academic libraries to subscribe to numerous types of electronic resources including indexes, full-text databases, reference sources, streaming video/audio collections, and journal collections from individual publishers. Consequently, it can be challenging for librarians to keep track of the renewal and payment process for online resources. This article will present an easy, readily accessible, and inexpensive way for librarians to alert themselves to upcoming renewals.

Overview

The renewal and payment process begins with the receipt of the renewal invoice/order form and is completed when an institution issues a check. Unfortunately, the process isn't always smooth or uncomplicated. The library might not receive an invoice or order form from a vendor; or it could be late or even misplaced. Losing track of renewal dates can put the library at risk for not notifying a vendor of a cancellation, possibly locking the institution into another one-year contract. Therefore, there is a need for a system which will help manage the renewal and payment process by reminding the relevant staff

members when they need to play their parts. The ideal system would send email reminders to all participants when each resource is up for renewal and a second set of email reminders to confirm that payment has been made to the appropriate vendor.

One possible solution is the adoption of an Electronic Resource Management System (ERMS). These systems provide a wide range of functionality and can be quite complex. An ERMS enables library staff to track the institution's electronic resources and can be set up to automatically send out reminders when necessary. Several major vendors (Ex Libris, Serials Solutions, EBSCO, SWETS, Harrassowitz, and others) offer ERMS systems. However, there are major drawbacks: an ERMS can be costly and difficult to set up and fully implement. Even lower priced systems, like Gold Rush (CARL), start at $4,000 per year for a subscription. Furthermore, the data in the system must be continually maintained. Another option is to go with an open source serials management solution like CUFTS. Unfortunately, there are hidden costs involved with open source. Often, a programmer or systems specialist who is comfortable working with open source software and operating systems like LINUX or UNIX is required. Other expenses which might be incurred include purchasing a server and other hardware to run the application.

Electronic Resource Management at Montclair State University

In an era of declining library budgets, none of these choices satisfied our staff. Rather than purchase and install an ERMS, we chose to continue to store useful information about our electronic holdings (vendors, cost, subject, renewal date, usage, etc.) on spreadsheets. However, we lacked a way to notify staff about impending renewal dates or payment status.

As our electronic resource collection grew and more items became available electronically, it became increasingly difficult to maintain the status quo. We were soon spending approximately $440,000 a year on more than 70 online products. Additionally, more personnel, including the Electronic Resources Librarian, Periodicals Librarian, and the Dean of Library Services and her staff, became actively involved in the management process. We were no longer able to track our subscriptions effectively using spreadsheets.

A Web-based Solution

While spreadsheets handled many of our needs well, we soon recognized that we also needed an email alert system to expedite the handling of renewals. We evaluated two major online calendars, Google Calendar and Yahoo Calendar, to determine whether they could be customized to do what we needed. After signing up for accounts, we set up a test email alert system on both platforms. It soon became obvious that Google Calendar was better suited to the kind of system that we envisioned. While both Google and Yahoo were easy to use, only Google allowed us to set up email reminders up to four weeks in advance of renewal deadlines. Yahoo, by contrast, limited email reminders to fourteen days notice.

Before populating Google Calendar with renewal dates, we needed to go into the “My Calendars” settings and select “Share this Calendar” to add all the email addresses for staff who required access to the calendar, and then save the settings. In addition, staff members needed to have an individual Google Calendar account (linked to a montclair.edu email account) with the same notification settings in order to receive all the email reminders at the designated times. This was accomplished by selecting the “Other Calendars” setting in each account and clicking on “Notifications” for the shared calendar. In the Notifications setup, email reminders were added for the desired time intervals (in our case this was one, two, and four weeks). After this was completed for all participating staff, the calendar was ready to be filled.

The next step was to have a student assistant post events and email reminders in Google Calendar. This was fairly straightforward. For each electronic resource, we wanted to keep track of the renewal date and payment status, so we created an “event” for each title. To create an event in Google Calendar (see Figure 1) staff had to complete the following steps:

1. Click on "Create Event" on the left hand side of the screen.

2. Type the event title in the "What" field (for example, ABI/INFORM Renewal or ABI/INFORM Payment).

3. Indicate the date of the event and whether it repeats yearly or at some other frequency (that is, carrying over the event to the following year or some other future date).

4. Under "Options", add the number of reminders needed and select the type of electronic reminder (for example, an email or pop-up message) as well as the time frame for sending them out in advance of the event (weeks, days, minutes). This can also be preset in the "My Calendars" settings under "Notifications".

5. Insert a description of the event, such as "Check for receipt of resource invoice" or "Verify resource payment".

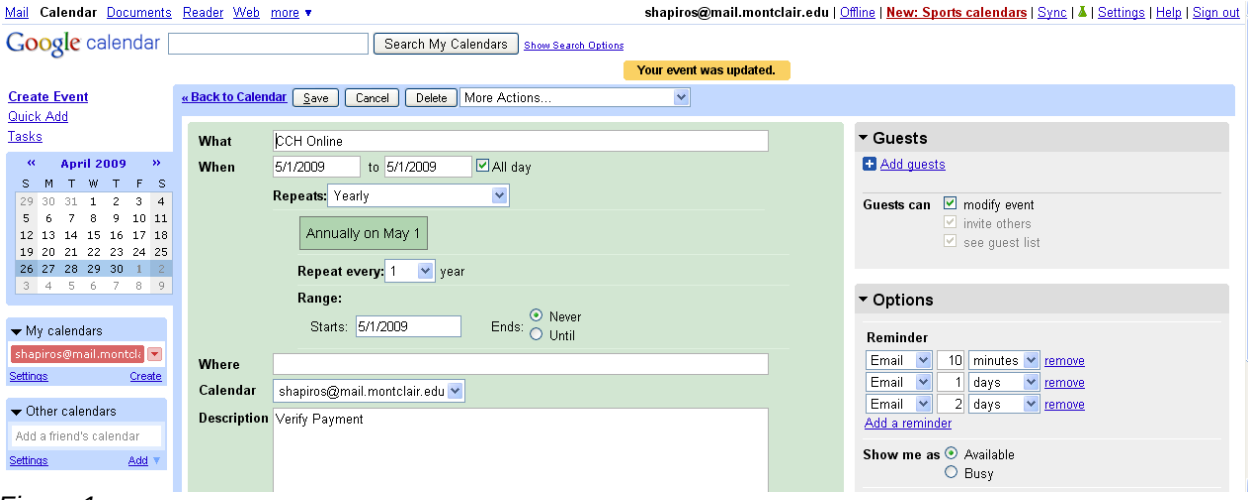

Figure 1

The software was customizable enough that we could add multiple reminders. Reminders were sent out four weeks, two weeks, and one week before the renewal date as well as four weeks, two weeks, and one week before a designated payment status check. The recipients included the Electronic Resources Librarian (myself), the Periodicals Librarian, and the Dean of Library Services' office, the key players in managing our electronic resources. Since Google Calendar allows events to be carried over year after year, there is no need to repopulate the calendar every year.

We developed a work-around in instances where we needed to be notified more than four weeks before a subscription lapsed. For example, if we wanted to generate a reminder 90 days before a renewal date, we simply created an event at least 62 days before the end of the subscription period and set up a reminder to be sent four weeks ahead of time. We made sure to embed the actual renewal date somewhere in the description for the event.

Once the calendar was operational, we had the capacity to login to our account and browse month to month to determine which electronic resources were up for renewal in the future and plan accordingly (see Figure 2).

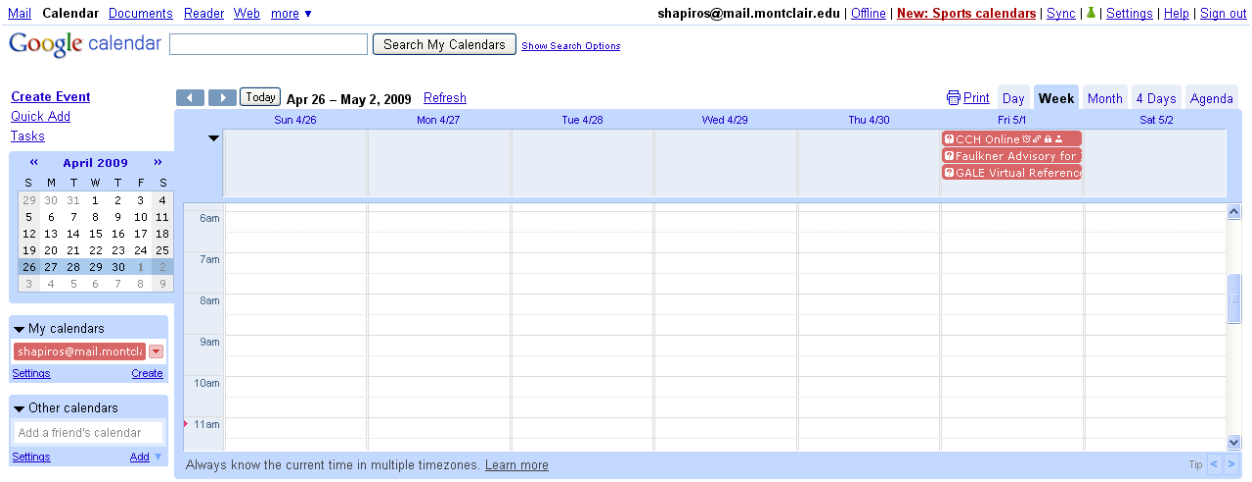

Figure 2

Other uses we discovered included monitoring the beginning and end of database trials as well as tracking scheduled meetings with vendors and staff. For the most part, however, we continue to use the calendar primarily as a basic alerting system. Although we have been using it for less than a year, we are satisfied that we have achieved our modest goals. The minor problems encountered were mostly related to errors in data entry, for example, incorrect dates or typos. All in all, the Google Calendar tool provides us with an effective means of following the renewal cycle for our electronic resources at a fraction of the cost of sophisticated proprietary systems.

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