That Was Easy! Incorporating (Free) Cloud-based Project Management Tools into Your Day-to-Day Library Workflows

Allison Kaiser Jones
College of Charleston Libraries

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Abstract

After realizing the limitations of Microsoft Office Suite for managing subscription renewals, the author evaluated commonly used cloud-based project management tools to help make the renewal workflows more collaborative, dynamic, and accessible. One criterion necessary for implementation- it would have to be free. This paper, derived from the author's presentation given at the 2019 South Carolina Library Association, explores several cloud-based project management tools that were considered, how the author incorporates a cloud-based project management tool into her collection management workflows, the pros and cons of doing so, and tips for implementation.

Keywords

Cover Page Footnote

The images within this paper are examples of the ways in which cloud-based project management tools may be used by collection management librarians; however, the information they contain do not represent actual vendors, costs, or materials. Correspondence concerning this article should be addressed to Allison Kaiser Jones, Electronic Resources & Serials Librarian, College of Charleston Libraries, 66 George Street, Charleston, South Carolina, 29401. Email: jonesak@cofc.edu

Introduction

In 2016, the College of Charleston Libraries' Collection & Content Services department was formed when Digital Scholarship & Services and Technical Services were reorganized. The department now consists of Acquisitions & Resource Management, Description & Cataloging Services, and Digital Services. Necessary to successfully reorganizing any library department is evaluating past workflows and implementing new ones. During the 2018 Spring Semester, the Electronic Resources & Serials Librarian realized a need to have a more dynamic and collaborative way to manage renewals of the Libraries' subscription-based resources. Previously she used email, Excel, and paper-based files to track the process. Although these tools were reliable, there were limitations for sharing information regarding the various steps that made-up each renewal with other members of the Acquisitions & Resource Management team. Thus, the Electronic Resources & Serials Librarian aimed to incorporate a cloud-based project management tool that was easy-to-learn, would allow for collaboration with multiple colleagues, and that was, most importantly, free.

While very few, if any, cloud-based project management tools are completely free, there are several which offer free modules that have a lot of functionality and versatility. These include Airtable, Asana, and HeySpace. In Airtable, users have access to 1,200 records per workspace, can access forms and a calendar tool, both of which are not customizable in the free module, meaning the Airtable branding cannot be removed (Airtable Pricing, n.d.). Asana allows for up to 15 users in their free module, has no limits on the number of projects that users can start, and has plenty of versatility for organizing tasks (Asana: The best…, n.d.). HeySpace allows for up to 10 collaborative members, provides 10 gigabytes of storage and unlimited spaces for projects as well as an unlimited chat feature (HeySpace Pricing, n.d.).

However, given that these tools are not as widely used for project management in libraries, the

Electronic Resources & Serials Librarian chose Trello, namely because it had been recommended by

several librarians on an ALCT's e-forum exploring project management in libraries. Trello's platform is

based on the Kanban model which allows users to break large projects up into manageable, linear tasks

(Jones, 2016). Benefits of using the basic Trello platform include an unlimited number of personal

boards, an unlimited number of cards to incorporate into the boards, an unlimited number of lists, and

10MB per file attachment, which is generally enough to upload a usage data or pdfs of correspondence

(Trello Pricing, 2020). Other pros of Trello include a Help Page that is truly helpful, keyboard shortcuts

that are not too difficult to master, and a Due Dates function that can send reminders to email.

Creating a Trello Board to Manage Renewals

An account is required in order to get started with Trello. Once registered, Trello can be used to

create boards. Each project is organized on a board. A board is composed of lists linearly arranged, and

each list consists of cards, which are where users input information about their projects. In October

2019, at the annual South Carolina Library Association Conference in Columbia, South Carolina, the

Electronic Resources & Serials Librarian demonstrated how she created a Trello board to manage

renewals. During the presentation, she demonstrated how she set up her renewals board, the lists that

make up the board, and the types of information input into the individual cards. She demonstrated how

to create and assign labels to cards, which provide a colorful way for flagging important information for

easy retrieval, and how to add attachments to them. Her presentation also included examples of two

more types of boards that may be created by collection management librarians, including one for

managing trials and one for organizing summer shifting/weeding projects. Examples of each of these

boards are in Figures 1, 2, & 3.

Figure 1
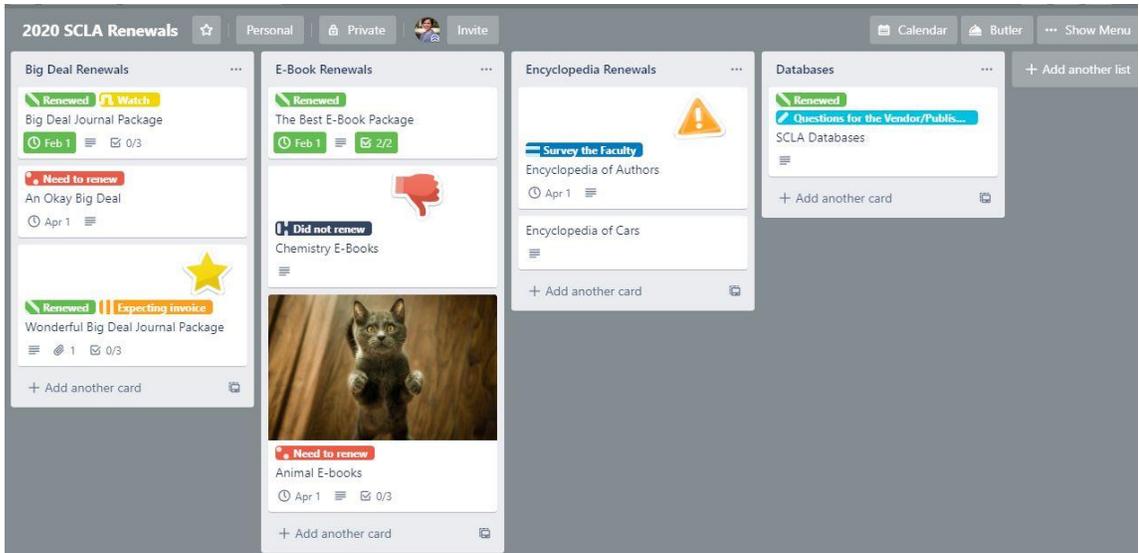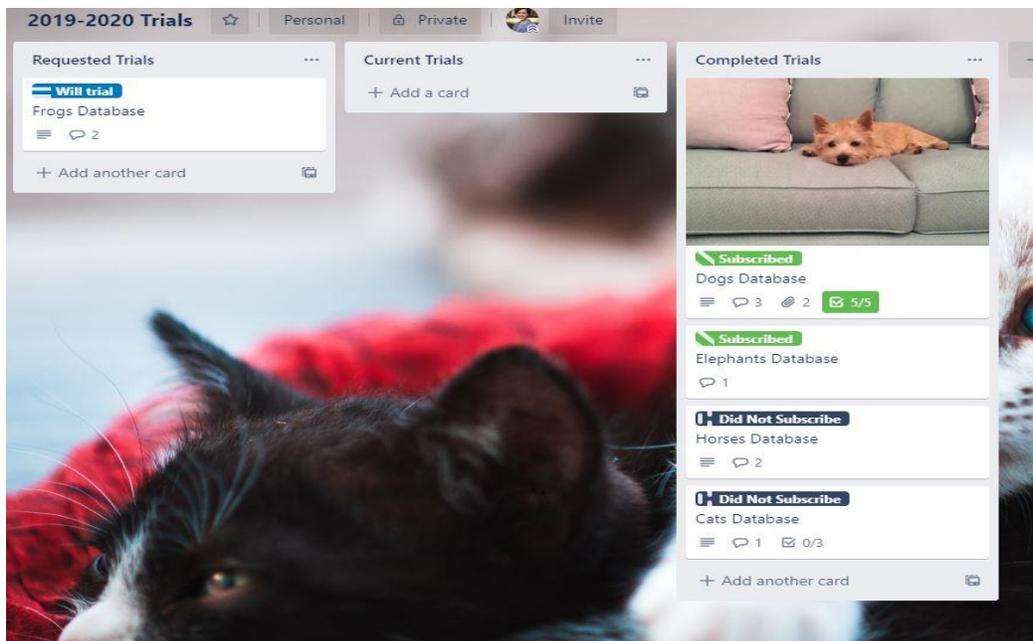
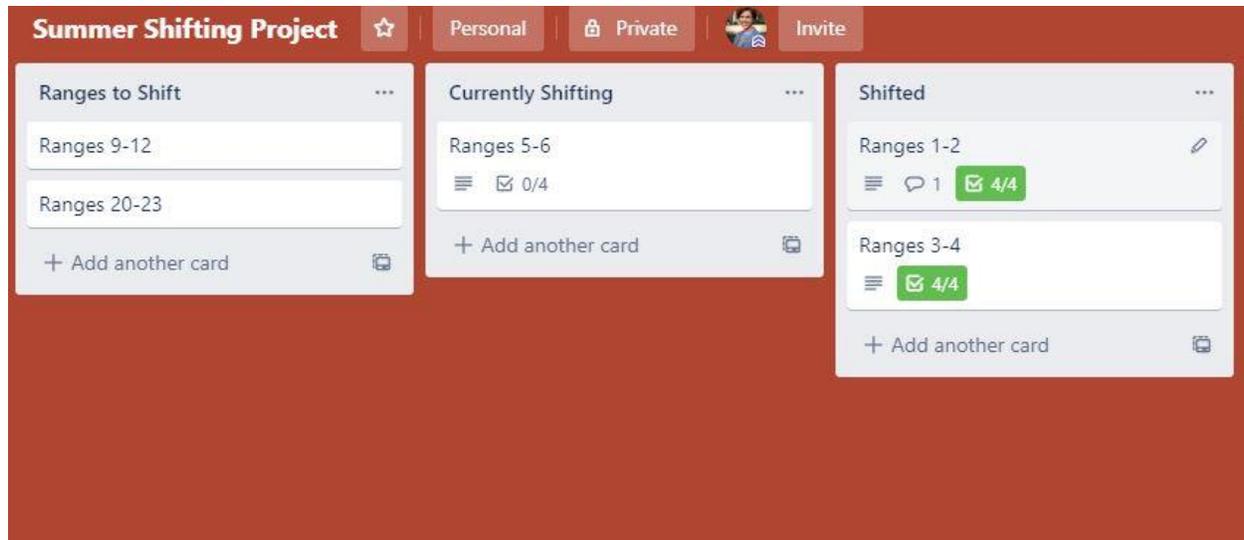*Image of using Trello to track renewals*

Figure 2

Image of using Trello to track trials

Figure 3

Using Trello to track shifting/weeding projects

Limitations of Trello for Collection Management Projects

Trello offers a lot of functionality for collection management projects, both large scale and small, but it does have some limitations. For instance, data put into Trello can only be exported in JSON which does not load into Excel (Exporting Data from Trello, 2019). This makes creating reports using Trello practically nonexistent. Another limitation of Trello is that although it has a lot of features for visualization and collaboration, it could be more robust. Labels are useful for vividly displaying information about particular cards within a board so that they stand out, but there is a limited number of colors available, which may be an issue for more complicated projects. Likewise, each card allows for commenting by a board's team members, which can be a great way for members to collaborate from multiple areas and at different times, but there is no way to filter comments. Too many comments can easily clutter a card, causing it to become overwhelming rather than organized and informative.

Conclusion

The Electronic Resources & Serials Librarian concluded her presentation about cloud-based project management tools by offering tips for incorporating these tools into collection management workflows. These are:

- Choose one project management tool that works for the entire department.

- Be patient while others learn to integrate the tool into their workflows.

- In Trello, be careful when adding new members to boards- it is easy to make a mistake.

- For larger/ongoing projects, edit Boards regularly, daily if possible.

- Set news alerts about a favorite project management tools to learn how others are using it and about important updates or changes to the platform or pricing models.

- Finally, while cloud-based project management tools are great, they likely will not replace an old-fashioned white board for handling "To Do" lists and jotting down ideas for future projects.

Author Note

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