TechAtlas for Libraries Technology Planning Guide
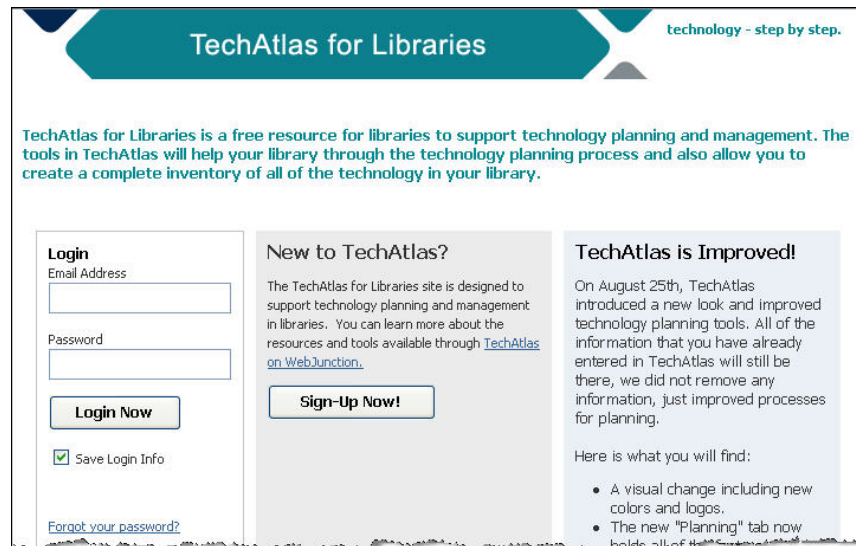
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Introduction

TechAtlas for Libraries is a suite of online technology management and planning tools provide as a free resource for libraries. Among the features included in TechAtlas are tools for creating your library's technology plan from Mission and Vision to creating a Budget to implement your plan. You will also find computer and technology assets inventory tools, a helpdesk tool called Event Tracker and reporting features. This guide introduces the technology planning process found in the **Planning** section of TechAtlas.

TechAtlas Login

To log into TechAtlas for Libraries, point your web browser to the following address:

http://webjunction.techatlas.org

Login with your existing TechAtlas account information or create a new account using the **Sign-Up Now!** button.

Home

The first time you log into TechAtlas you are placed on the Home page. Here you see site navigation links and tabs to tools and features on the site.
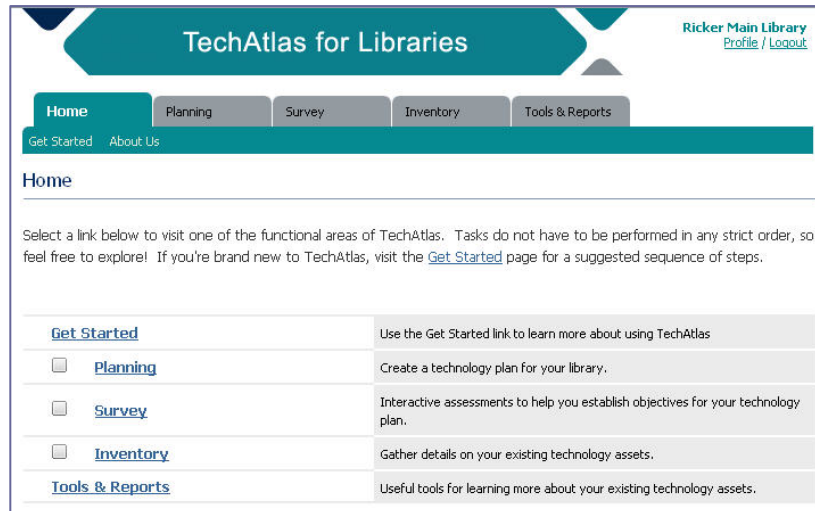
Getting Started

The technology planning process built into TechAtlas does not have to be performed in any strict order, so feel free to explore! If you're brand new to TechAtlas or the technology planning process, consider following this sequence of steps:

Planning tab

- Assemble a planning team.

- Describe your mission and create a vision.

- Identify goals and related objectives and activities.

- Consider adding links or downloadable copies of relevant technology policies into TechAtlas.

Inventory tab

- Create an inventory of computers and technology assets in your library in order to identify opportunities for upgrades and improvements and then plan accordingly.

Survey tab

- If you need help breaking your goals down into specific objectives, you can take one or more online assessments. You can also survey your staff members to learn about their current technology skills.

Planning tab

- Create a budget to support the plan.

- Once you've completed your technology plan, add steps to evaluate the overall progress of your plan.

- You can download a copy of your plan and edit it further, or send it by e-mail to the members of your technology team for review.

- Conduct ongoing reviews of the plan's progress, make midcourse corrections and update the plan, as needed.

To get you started, the remainder of this guide will explain how to use the features found in the Planning tab only.

E-rate Applicant Tips are placed throughout the Planning section in the upper right corner of the page to assist libraries preparing a technology plan for that purpose.

Planning

Begin the technology planning process by clicking on the **Planning** tab or click the **Planning** link on the Home page.

Plan Years

Start the planning process by specifying which years your technology plan will cover. This information defines the scope of the entire plan and budget years.

1. Click **Plan Years** on the Planning page.

2. Select a year from the **Year** drop down menu.

3. Enter the **Start Date** for the year in DD/MM/YYYY format.*

4. Enter the **End Date** in DD/MM/YYYY format.

   - You can leave the Start Date and End Date fields blank or edit the dates at a later time, if desired.

5. Click **Add**.

   - The year will display and is marked **Active** by default.

6. Repeat the process to add one or more years to your plan.

*For example if your library considers planning year 2010 to run from July 1, 2009— June 30, 2010, you can specify that date range. If you choose to enter the optional start

and end dates for your calendar years, the dates will display and print out at the top of the technology plan when it is downloaded or printed.

Deactivate a Plan Year

Once a plan year has passed or you longer want the technology plan to reflect that year's budget information, you can deactivate the plan year. Deactivating the plan year does not delete budget information, only hides it from view. It does not affect display of goals, objectives or activities even if they have delivery dates set within that year.

To deactivate a Plan Year:

- Select the Active checkbox for a Plan Year to remove the green check.

To make a Plan Year active:

- Select the Active checkbox for a Plan Year to display the green check.

Delete a Plan Year

If you delete a plan year, all budgetary information associated with the year is also deleted. It does not affect display of goals, objectives or activities even if they have delivery dates set within that year.

To delete a Plan Year:

1. Select the **Delete** button adjacent to the Plan Year.
2. Select **OK** to delete the Plan Year.
3. The year is removed from the list of Plan Years and all related budgetary information posted in the Budget Worksheet is deleted as well.

Team

Assemble a technology planning team that includes representation from a broad spectrum of program and stakeholder perspective. Finding the right mix of board members, staff, volunteers, and others will help shape a technology plan that supports your library's mission and can be successfully implemented. Links to additional information on the planning process are provided in the upper right corner of the page throughout the Planning section. See: WebJunction Article: Building a Technology Team.

1. Select **Team** from the sub-navigation link under the Planning tab or click **Assemble your Team** from the site navigation links.
2. Enter the name and email address of your technology plan team leader.
3. Enter the email address of the other technology planning team members.

The team email addresses will automatically display as potential staff to assign Activities to in the Goals and Objective section. The email addresses are also used in the Download Technology Plan section to email the technology plan to the team for review and approval.

Mission & Vision

Mission and vision statements are great resources to help guide the library through the decision making process. The technology team can refer back to these statements to reinforce decisions, guide planning and provide a check for the direction that the library is choosing to take. Although continuous changes in technology will require you to review and revise your technology plan, most mission and vision statements are written with a long-range perspective that remains applicable for many years.

Describe Your Mission

Describe your library's service priorities in a short, succinct statement. This mission statement may already exist as an outcome of the library's long-term strategic planning process.

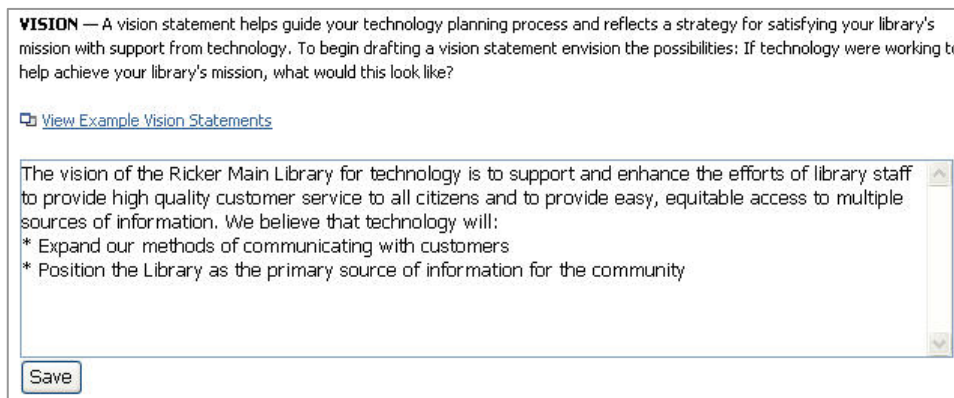1. Select the **Mission & Vision** sub-navigation link or click **Describe your Mission**.

2. Either copy & paste or enter the library's mission into the textbox.
3. Click **Save**.

Create Your Vision

Create a vision for the use of technology in your library that reflects a strategy for satisfying your library's mission.

1. Select the **Mission & Vision** sub-navigation link or click **Create your Vision**.

2. Scroll down the page to the Vision section of the page.

3. Either copy & paste or enter the library's vision into the textbox and click **Save**.

The mission and vision statements display in the technology plan.

Goals and Objectives

With a mission and vision in place to guide your planning, you are ready to start setting goals, creating objectives and assigning activities to staff.
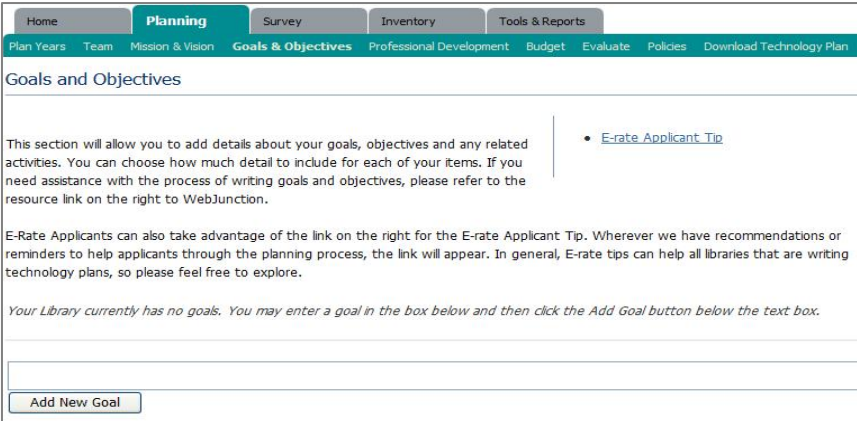
Technology planning goals are broad in scope and should be driven by your technology vision statement. Refer to the library's mission and technology vision to ensure goals are relevant to the library's long-range plans. Consider the question: "What patron service outcomes do we expect to see from implementing new technologies in the library?"

An objective is tied to a goal and is a specific, required step toward accomplishing the goal. Write objectives describing specific outcomes so that the expected results are easily understood and the statement makes sense without further explanation. Review the webinar "Writing SMART Goals" for additional information on writing goals and objectives.

Add New Goal

To create goals:

1. Select **Goals & Objectives** on the Planning tab.

2. Enter the text of the goal in the textbox and click **Add New Goal**.
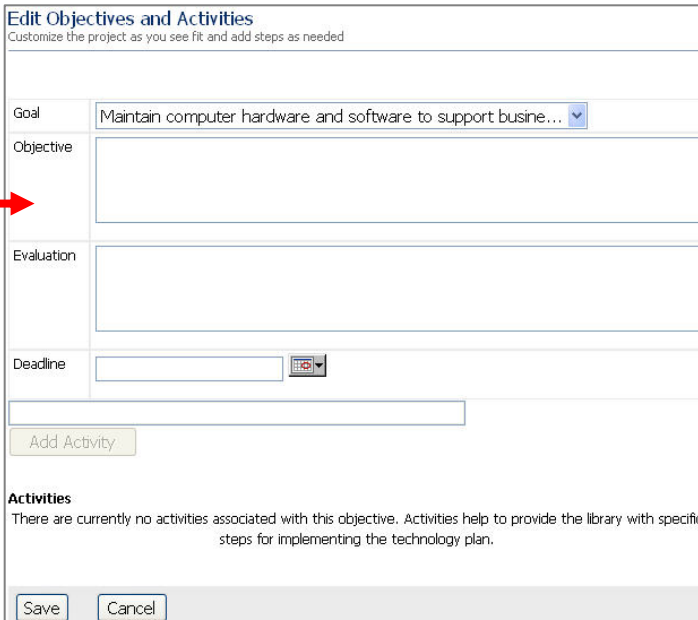
3. The Goals and Objectives page refreshes to display the new goal.

4. Continue to add additional new goals, as needed.

You can either, create all goals at one time and then return to each goal to add the objectives or create one goal and related objectives at a time.

Add Objective

To add one or more objectives to a goal:

1. Scroll down the list of goals and locate the desired goal.

2. Click **Add Objective** under Actions for that goal. The **Edit Objectives and Activities** page will display listing the goal statement.

- Note the associated goal for the new objective defaults to the goal you selected. If you would prefer to link the new objective to a different goal, select a goal from the **Goal** dropdown menu.

3. Enter an objective using specific, clearly understood details in the **Objectives** textbox.

4. Enter text for the **Evaluation** plan. Identify how you will measure successful completion of the objective in order to determine whether you have reached the expected results. This is an optional step.

5. Enter a **Deadline** date for completion of this objective. Part of your evaluation plan should include completion of the process within a specific timeline. This is an optional step.

6. Click **Save**.

   - You can not enter activities for a new objective until it has been saved.

7. The Goals and Objectives page will refresh and display the new objective.

Add Activity

Once you have created objectives for a goal, you have the ability to break down the objectives into actionable and assigned tasks or activities. This level of detail is optional, but can aid in creating specific steps for implementing the technology plan.
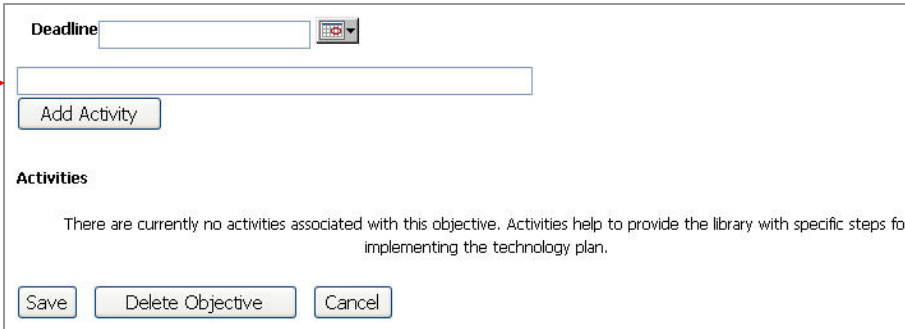
1. Click **Add Activity** in the Actions column next to the desired objective. The Edit Objectives and Activities page displays.

   - Note you can change the goal to which an objective is linked, however activities are linked to the objective and will move with the objective when reassigned.

   - To reassign an activity to a different objective you will need to recreate the activity in the correct objective and delete the old one. See **Edit and Delete.**

2. Scroll down the page and locate the **Add Activity** button.

3. Enter the activity details in the textbox above the button.

4. Click **Add Activity**. The page will refresh and display additional fields define the scope of the activity.

5. The **Assigned to** field allows you to assign the activity to a technology team member. Click a listed member's email address or enter anyone's email address in the textbox provided.

6. Enter a **Deadline** date when the activity should be completed using *mm/dd/yyyy* format.

7. Click **Save**.

8. The Goals & Objectives page will refresh listing the new activity.

You can either, create all objectives at one time and then return to each objective to add the activities or create one objective and related activities at a time.

Edit and Delete

Select the **Edit** link for a specific goal, objective or activity in order to update or make changes to the item. This includes:

- Change the goal association for objectives.

- Edit the wording of goals, objectives and activities.

- Update the deadline for completion of an objective or activity.

- Change the member assignment of an activity.

- Edit activities.

Select the **Delete** link for an item to permanently remove it. Before deleting an item consider the following impact:

- Deleting an activity only deletes the specific activity selected.

- Deleting an objective will also delete all related activities.

- Deleting a goal will break the link to the related objectives and activities and move them into the **Unassigned Objectives** section at the bottom of the Goals and Objectives page.

Unassigned Objectives

You will initially have no unassigned objectives. Completing an assessment in the TechAtlas Survey tab may generate new objectives for your library. You will need to either assign these objectives to a goal or delete them. Unassigned objectives and related activities will also be listed here after there assigned goal has been deleted.

To attach unassigned objectives to an existing goal:

1. Click the **Edit** link for the specific objective listed in the Unassigned Objectives section.

2. The Edit Objectives and Activities page will display and the Goals dropdown menu will be blank.

3. Select a goal from the dropdown list.

4. Click **Save**.

The Goals and Objectives page will refresh and the newly assigned objective and related activities will be listed under the specified goal.

Note you can also create a new goal and assign the objective to it once the new goal is created.

To delete the Unassigned Objectives:

1. Mark the **Delete** checkbox for the specific unassigned objective.

2. Select the **Delete selected unassigned objectives** button.

Reorder Goals

Once you have created all your technology planning goals, you can reorganize the order in which they display in the plan.

1. Click the **Reorder goals** link above the Planning Steps section of the Goals and Objectives page.

2. The **Edit Goals** page will display. You can also access this page by clicking the **Edit** link next to any goal.

3. Use the number field to the left of the goals to change the order in which they will appear on the Goals and Objectives page.

4. Click **Save**.

All associated objectives and activities remain linked to the reordered goals.

Show/hide Objectives and Activities

Once you have created a number of objectives and activities for each goal, you may find it convenient to change the viewing option to display only the goals. To do so, click the **Hide objectives and activities** link above the Planning Steps section of the Goals and Objectives page. Select the **Show objectives and activities** to return to the full display of all items.

Professional Development Strategy

Part of planning and managing technology in your library is anticipating the training needs of your staff to ensure they know how to use new technologies to improve education or library services.

One of the easiest ways to make sure that you address this requirement is actually in the Goals & Objectives section of the technology plan. Any time a new goal is created for the technology plan, create any related training objectives needed to insure the goal can be met. Another option is to use the professional development box to explain how the library handles training and ongoing efforts to meet staff training needs. Certain programs, such as E-rate require a professional development strategy in your technology plan.

To create a professional development strategy,

1. Select the **Professional Development** sub-navigation link.

2. In the **Describe your strategy** textbox enter your professional development strategy.

3. Click **Save**.

Budget

With a clearly defined plan you can now prepare a budget for funding your technology needs. TechAtlas allows you to design and customize a budget worksheet. The basic steps to creating a budget in TechAtlas include:

1. Specify in the **Plan Years** the technology plan will cover in the Planning tab. Then return to the Budget section to continue.

2. Configure **Budget Setup** options for your technology plan by choosing to budget at either the Objective or Activity level.

3. Add **Budget Categories** and **Funding Sources** to create the structure of your budget worksheet.

4. Open your customized **Budget Worksheet** to begin entering budget figures. Fill out the budget worksheet for your technology plan entering as much or as little budget detail preferred.

Budget Setup

Choose the level of detail for your budget by selecting from the dropdown menu.

- Activity level budgeting links costs to specifically assigned tasks created for objectives.

- Objective level budgeting is more general but still tied to measurable outcomes.

Budget Categories

Identify the budget categories you will use to group resources and spending allocation. These categories may coincide with those of the library's general budget and may include categories unique to technology, such as Computer Hardware, Software, Services or Networks.

1. Type in the title of a category in the **Add new Budget Category** textbox

2. Click **Add**.

3. The page will refresh with the new category listed. Repeat the process to add more categories.

Funding Sources

Use this function to designate the source of funds for line items in your TechAtlas budget worksheet. Funding Sources may be the same as those found in your general library budget and those unique to technology funding, such as E-rate or LSTA.

1. Type in the title of a category in the **Add new Funding Source** textbox

2. Click **Add**.

3. The page will refresh with the new source listed. Repeat the process to add more funding sources.

Budget Worksheet

The Budget Worksheet is a web form based on the plan years, goals, objectives and activities, and budget categories and funding sources that you have already created. Use this form to create your technology budget:

1. Click the **Budget Worksheet** link on the upper right corner of the Budget Setup page.

The Budget Worksheet page first displays any unassigned objectives or activities followed by those assigned to a specific goal or objective.

2. Click **Edit**.

3. For each item listed,

    - Enter the annual budget amount for each year of your plan.

    - Enter any **Ongoing Costs** for the item.

    - Select a **Budget Category** from the dropdown list.

    - Identify the primary **Source of Funding** from the dropdown list.

4. Click **Save** when finished editing the worksheet. The screen will return to the Budget Setup page.

Budget Worksheet

You are currently budgeting at the **objective** level.

[Print Table]   [Download Spreadsheet]

[Edit]

Objectives	2009	2010	2011	Ongoing Costs	Budget Category	Source of Funds
Upgrade the hardware components over a 3 year cycle.	$0	$0	$0	$0		
Take WebJunction's World Wide Web Assessment.	$0	$0	$0	$0		
Use asset management software to ease the process of tracking your computer inventory.	$0	$0	$0	$0		
Total Costs for this Goal	**$0**	**$0**	**$0**	**$0**		

	2009	2010	2011	Ongoing Costs	Budget Category	Source of Funds
Goal: Maintain a secure computer network						
Maintain security on library network as growth in use and services change.	$1500	$1600	$1700	$1600	Computer Hardware	State
Send copies of backup media to an offsite storage location on a regular basis.	$1500	$1500	$1600	$1500	Computer Hardware	City
Total Costs for this Goal	**$3000**	**$3100**	**$3300**	**$3100**		

	2009	2010	2011	Ongoing Costs	Budget Category	Source of Funds
Goal: Maintain computer hardware and software to support business needs						
Update your computer hardware inventory at least once a year.	$0	$0	$0	$0		

To continue editing the worksheet you can:

- Click **Print Table** to print the worksheet and use the copy for review and editing.

- Click **Download Spreadsheet** to access the document as a spreadsheet for inputting further changes. The edited document can then be saved to your computer in a common folder. Note that these changes do **not** upload back into the TechAtlas account.

Budget Summary

The budget worksheet can be viewed in a summary format, offering an overview of expenses by Goals, Budget Categories and Funding Sources.

1. Click the **Budget Summary** link on the upper right corner of the Budget Setup page. The Budget Summaries page displays.

Budget Category	2009	2010	2011	Ongoing Costs
Unassigned	$0	$0	$0	$0
Computer Hardware	$3000	$3100	$3300	$3100
Training	$150	$0	$0	$0
Total Costs	$3150	$3100	$3300	$3100

Funding Source	2009	2010	2011	Ongoing Costs
Unassigned	$0	$0	$0	$0
City	$1500	$1500	$1600	$1500

2. Click **Download Spreadsheet** to access the document as a spreadsheet for inputting further changes.

   - You can either Open or Save the file. The edited document can be saved to your computer in a common folder. Note that these changes do **not** upload back into the TechAtlas account.

   - Use your browser **Back** arrow to return to TechAtlas.

3. To print sections of the Budget Summaries page, click the **Print Table** button above the desired section of the worksheet. (i.e.: Goals, Budget Categories or Funding Sources.)

Evaluate

Once you have completed your technology plan, design a formal review process you will use on an ongoing basis to evaluate the plan's progress and to ensure the plan is still relevant. Create steps that will guide you to making any needed mid-course corrections to your plan as technology and your library service needs change.

Since each objective in the plan can also have individual evaluation components, this multiple step process should focus on the overall review of the planning process and not toward individual goals or objectives.

1. Select **Evaluate** from the sub-navigation link under the Planning tab or click **Evaluate** from the site navigation links.

2. Enter the step in the **Add New Evaluation Step** textbox provided

3. Click **Add.**

4. Repeat to create additional steps in the evaluation process.

5. **Edit** or **Delete** a step, as needed.

Policies

If referencing library policies with TechAtlas would benefit your planning process, consider attaching library and technology related policies to your technology plan and storing them in TechAtlas for direct access.

To add a new policy:

1. Select **Policies** from the sub-navigation link under the Planning tab or click **Policies** from the site navigation links.

2. Enter the **Policy Name**.

3. There are two different ways to store your policies:

    - Provide a link to where the file can be found online by entering the address in the **Online Location** textbox, or

    - **Upload the policy document** as a file to TechAtlas (maximum file size is 5MB)

4. Enter the date the document was **Last Updated**, if desired.

5. Click **Add Policy**.

Download Technology Plan

The final step in the technology planning process is submitting the plan for review and approval. You can download and edit the plan further, if needed, then print your technology plan. You can even send the plan by e-mail to the members of your technology team for review.

To review the technology plan in TechAtlas:

1. Select **Download Technology Plan** from the sub-navigation link under the Planning tab or click **Download Technology Plan** from the site navigation links.

2. The plan displays on the page. Scroll down to review the document.

To download the plan:

1. In the top right corner of the page select the desired format:

- **Download in MS Word Format (.doc)**
- **Download in Rich Text Format (.rtf)**

2. The plan displays and can be printed or saved.

E-mail the plan for review:

1. In the top right corner of the page select **Email Plan for Review.**

2. An email window will open automatically addressed to your entire technology planning team with text and a link pointing your team to the technology plan.

3. Edit the email addresses as needed.

4. Enter additional email text and send the message.

Conclusion

Once you have created your library's technology plan, continuous monitoring of your progress toward accomplishing goals, objectives and activities will be required. To ensure your plan is still relevant and on target, conduct on-going evaluation and make mid-course corrections or updates to your plan.

Other tools and features in TechAtlas can assist you in maintaining and monitoring technology assets, such as the Computer Inventory tools and Event Tracker, our free helpdesk tool. These features can provide valuable diagnostic information and create a knowledge base or record of technology assets that can guide future decision-making. Links to TechAtlas for Libraries and WebJunction resources are provided below.

Additional Resources

Technology Planning: In addition to this guide, WebJunction also offers free technology planning resources accessible from the Technology Planning section of WebJunction:

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http://webjunction.org/TechPlan

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Webinars: WebJunction also offers occasional webcast presentations on technology planning and using TechAtlas. For a list of upcoming and archived TechAtlas webinars, visit:

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http://webjunction.org/techatlas-webinars

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Other Features: For information on using other features found in TechAtlas, such as technology inventory tools and our helpdesk tool, Event Tracker visit our WebJunction website:

<div align="center">

http://www.webjunction.org/techatlas

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Technical Support: You may access TechAtlas technical support from WebJunction by sending an e-mail message to the following address:

<div align="center">

techatlas@webjunction.org

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