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Tech Services on the Web: Remember the Milk; <http://www.rememberthemilk.com>

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REMEMBER THE MILK

<http://www.rememberthemilk.com>

Becoming and staying organized is made easier with Remember the Milk. Remember the Milk or RTM is a free cloud-based site as well as an app that plays a key role in my personal efforts to “get things done.” RTM is perfect for technical services librarians because it provides for creating alerts for tasks that need regular scheduling as well as tasks that require repeated follow up.

As a combination technical services/electronic resources librarian in a fairly small library, I manage many different workflows which may or may not be deadline driven. Some tasks have hard deadlines; others are routine but need to be scheduled on a periodic basis (typically monthly or quarterly); and, some require repeated follow up in order for the task to be completed. RTM allows a task to be scheduled either one-time or on a repeated basis. Rather than a specific due date, the user can easily type into the “repeat” field “every month,” and then the task appears every month after the initial due date. The only negative aspect of this feature is that when a task is finally completed, the user needs to change the “repeat” field to be blank or the task continues to appear on the users’ to-do list. In addition to tasks that happen periodically, this feature can be used for lowest-priority tasks and outcomes.

One-time tasks that are easily missed can be conquered by RTM. Electronic resource trials are a prime example. Querying colleagues a few days to a week before the trial ends is helpful since most of my colleagues are too busy and overwhelmed by email to respond to my initial email communication. After the trial is over, I need to remember to remove it from our electronic resource web pages. Another example

would be managing new stand-alone electronic journals and other electronic resources which may not “go live” until several months or even longer after the license and/or payment is in place. Vendors do not always contact me to tell me that the resource is ready for activation.

Here are some examples of how I personally use the “repeat” feature in RTM for work: to pull reports of serial title changes every first week of the month; to check for two types of claim reports on a monthly and quarterly basis; to update ebook records for growing collections (often best managed on a quarterly basis since batch loads are more efficient); to coordinate a team of colleagues who help me with a library professional organization website on a rotating monthly basis; to perform catalog cleanup maintenance involving command searches to find bad records; to follow up on specific electronic resources that are not in the knowledge base of our link resolver or ejournal portal and require periodic follow-up.

RTM has some features that make accomplishing both one-time and repeating tasks much easier including fields to add URLs and tags, and, most importantly, a separate note feature. Using tags is critical to successfully using RTM. The tag cloud is extremely useful when I can't remember when a task is due or otherwise need to look at my reminder. Also, once a task is marked “complete,” it disappears from the default tag cloud. It is much more easily found if it is tagged. Being able to add URLs is also time-saving –I do not have to look up the specific URL to find, for example, new bibliographic records from a vendor. The note feature is fantastic because an email history can be copied and pasted into the note. This allows for less email to clutter my inbox. The note feature is also great for one-time tasks like removing specific records for non-arrived books from OCLC.

Folders can be created to separate types of tasks. For example, I keep personal tasks separate. Tasks can be marked by priority level or moved

up your list by priority as well. The title of task can be updated so if the first phase of a project is completed, you can keep the details in the task but change the title to reflect the second phase of the project. Your task list can be filtered by what is due today, due tomorrow, or overdue. The postpone feature is also helpful for moving overdue tasks to today. Other features that should be noted include an email alerting function (which I do not use since I want to minimize email), ability to add a task by emailing it to a special email address linked to my RTM account and free, once-a-day syncing of the web product with the app on my device. Power users opt to pay for the pro account which includes live syncing as well as priority support. For those who like print, the task list can easily be printed out. Lists can be shared with others as well in a manner similar to Google Drive or Dropbox. Gadgets exist to integrate RTM into Google Calendar and users can export their tasks into iCal format. Lastly, Smart Lists are lists that you can generate based on different criteria including tags, priority status and dates. I have one just for overdue items for work.

The main problem with RTM is to use it well requires some time investment. Tasks that are very in the “now” or very easily resolved can be added more quickly to other kinds of web tools such as Workflowy.com. Workflowy.com is essentially an extremely simple notepad that has no learning curve whatsoever. It has a nice feature that when a task is completed and crossed out, it is saved into memory. RTM has a “smart add” feature for quick adding that is exactly like Workflowy.com but I’m experimenting with using both products simultaneously.

Rating: Five stars