

Monday, June 14<sup>th</sup>, 2004, 2:45pm – 3:45pm

## **Topical Discussion: Training, Public Services and User Education**

Room 4-153

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### **What could, should, would be included in training for users**

- Would like LC classification tutorial more prominent from within the catalog.
- MIT – Information Navigator website (<http://libraries.mit.edu/tutorials/general/>) targeted at all library resources, not just the catalog. There are links within the ALEPH OPAC to the Information Navigator – primarily in the Your Account area.
- University of Notre Dame – SDI service – link to new features from the homepage. Also advertise new services via broadcast emails.

### **Wish list:**

The LC call number within the catalog links to a map of the stacks showing where the book can be found.

- The University of Michigan has an “i” link near the library name that gives location and hours information.
- Harvard – info link – in a new window links to guide and hours. Widener has a link at the top level to call number chart gets a lot of use.

### **Who offers classes regularly?**

- A couple of universities have classes regularly as part of a writing program. For some a required course includes coverage of the catalog.
- Universitat Stellenbosch in South Africa has an animation slide show of screen captures that show various catalog concepts (<http://www.sun.ac.za/library/eng/help/Viewlets/Menu.htm>). They use “viewlets” software (java program, free trial, ~\$500 for full program). A similar program used at other universities is “camtasia”.
- A major issue is that many times people don’t come to classes about library services or catalogs.
- Texas Tech University – offers a web CT course and also sessions by appointment.
- University of Michigan – Includes instruction on the OPAC as part of some popular classes, such as MEDLINE searching; people will come to these classes and we can expose them to the OPAC as well.

### **What are frequently asked patron questions for which training might be helpful?**

- Is a book checked out? Users often miss that one extra click to the availability page.
- What journal issues we have – users often overlook or don’t understand summary holdings or the concept of a serial.
- Users don’t always see the “My Account” link. Patrons often ask what they’ve checked out, and to renew instead of looking it up themselves.
  - One solution – include a hyperlink to “My Account” in patron emails – overdue notices, reminders.
  - Another solution – include a link to a tutorial about how to renew, check out and place holds in those notices.
  - For one institution, where they were having trouble getting people to enter their barcode in the ID field – they put a picture of an actual barcode to show people what to input.

- Different names used for Account features: “My Account”, “Your Account”, “My workspace”

### **Usability testing for determining training needs.**

- A few institutions are doing some basic usability testing of their OPACs. Nobody has tested the more complex features (like Your Account, the basket, etc.). MIT was asked how they got participants:
  - Signup sheets at libraries get users who come to the libraries.
  - Signup sheets at registration day tables gets students who don't often use the libraries.
  - Use enticements liberally like coupons for ice cream, amazon.com, etc.
  - Use only a few (less than 10) participants for a test and you get most of the big problems found. Then test again to find the next set of problems to fix.
  - MIT doesn't worry too much about equal representation among user types (i.e. undergrads, grad students, faculty)

### **“One stop shopping” SFX solution**

- Harvard – single record bib for multiple holdings – print and electronic
- Online holdings -- can limit collection to online resources, but have a problem limiting by campus.
- University of California – can't pick and choose which records show the SFX links.
- Cataloging issue – if individual e-journals are not cataloged – e.g. for titles in aggregated databases.
- There exists confusion among patrons on different bases – the whole catalog versus course reserves. Brandeis – the catalog record says in reserves but you have to redo the search in the reserves module to find the course info.
- Students are more likely to click on the whole catalog versus the reserves base.

It's difficult to talk about training without talking about design of the interface. If you do a really good job with design, the need for training decreases. There are always issues that you can't design away though.

One institution is rethinking the decision to not put certain serials in the journals base, like annuals, especially when patrons are looking for them as journals. One possible solution – put in a big link that says “Didn't find it?... Look in the full catalog (with a link)”.

### **Other ways of knowing your users?**

- MIT participates in a broad, multi-institution survey, the College Students Experiences Questionnaire, which shows that MIT students are less likely than their peers at other institutions to ask librarians for help.

Harvard has had to split holdings summary versus availability and finds that this is confusing to users. For items on order, an item records is on the availability screen, but not cataloged, so it doesn't appear on the holdings screen.

Question from UC Davis – **What do you do about how Boolean operators work differently between the basic and advanced search?** In the advanced search Boolean operations as part of a title results in 0 hits. Example: “the red and the black” exact title search. This works in the basic search.

- Suggestion: Have examples appear tailored to the type of search the patron selects. See University of Iowa and others are using this method as well.

- Suggestion: University of Maryland working on Boolean tips explanation, still to come. University of Michigan displays parentheses on the advanced search 3 box screen.

MIT's library home page is changing and will have some blog-like sections with tips where they plan to incorporate tips for the catalog and other library services. Also putting the basic search form on the home page.

**Does anybody not put the LC call number on the brief display – on purpose to get users to go to the availability page?**

- Harvard doesn't put the call number on the Holdings page, not because of wanting a particular user behavior, but more for system performance.
- UCDavis doesn't either, but it is more because of many locations and different call numbers by location.
- Notre Dame puts the owned/out info on the brief display never expecting the user to need to go to the full record or availability pages.

**Has anyone solved the problem for serials where the earliest year of publication shows on the brief display, confusing patrons into thinking that the library owns all of the issues?**

- Notre Dame – was able to suppress the year on the brief display just for serials.