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"Takin' It to the Web": Updating Operations Manuals for Today's Techno-Realities

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"Takin' It to the Web": Updating Operations Manuals for Today's Techno-Realities

Kathleen Spring
Collections Management Librarian
Linfield College

**Presented at NWILL
September 16, 2011**

If you don't like my presentation . . .

blame Chelle Batchelor!

(just kidding)



NWILL 2010

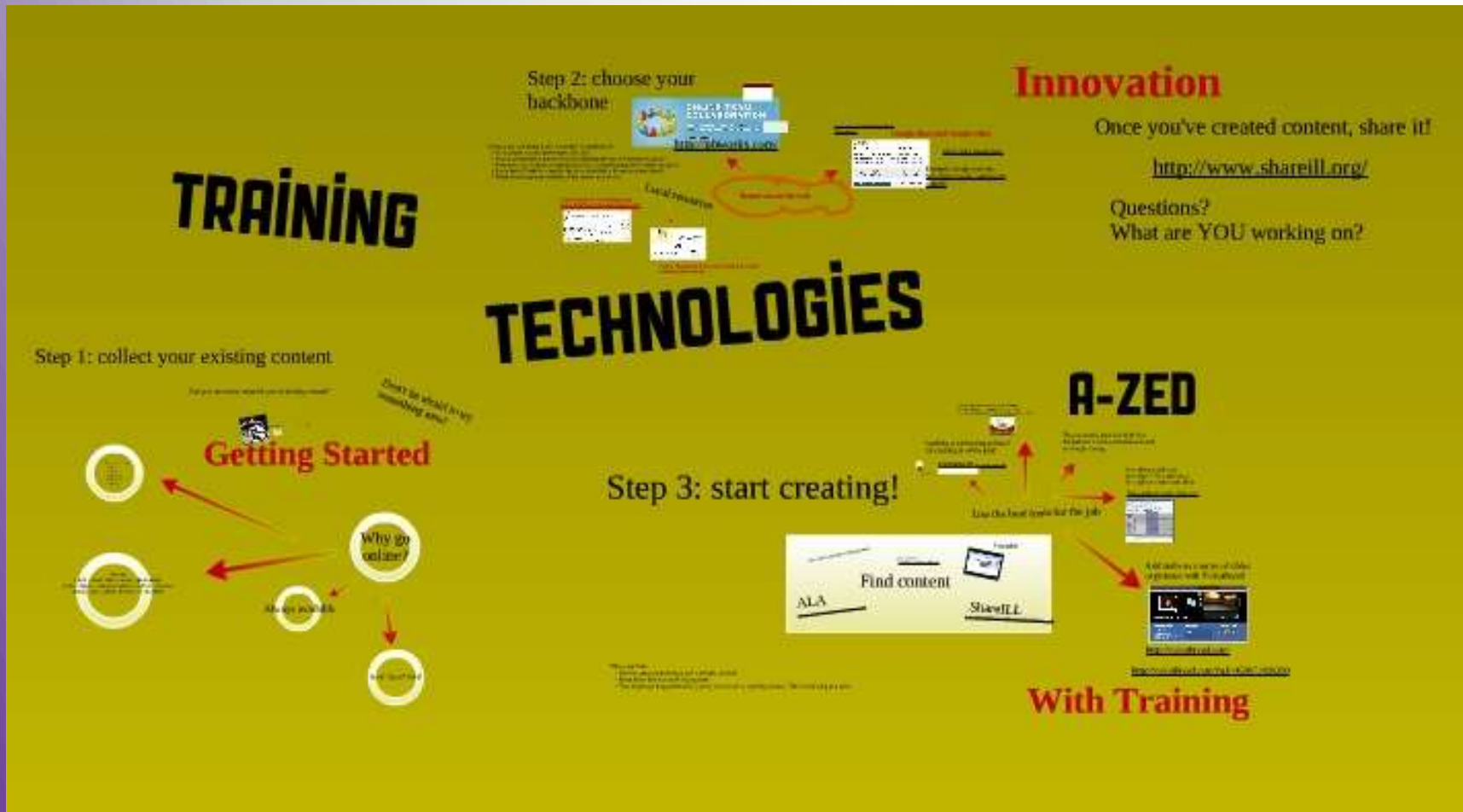


Image courtesy of Chelle Batchelor
<http://prezi.com/xcvealfejw3w/training-a-zed-getting-started-with-training-innovation/>

Things I learned from Chelle

- What you want to do will determine how you house your content (e.g., course management system vs. wiki)
- Utilize the strengths of various tools (your content doesn't all need to look the same or be delivered in the same way)
- Think about your strategy in advance!



Today's Agenda

- Status quo at Linfield
- Rationale for change
- From 2-D to 2.0
- Challenges
- Tips for transitioning to interactivity



Status Quo



ILL at Linfield (OLC)

- Linfield = OLC & OLL (but today we're only looking at OLC)
- FY 2010-2011 – just shy of 8900 transactions
 - 3722 lending requests
 - 3196 borrowing requests
 - 1308 unfilleds
 - 673 items filled locally
- Full-time FTE = 1.27
- Student worker FTE (7-8 students) = 1.75 – 2



Student Responsibilities

What do we ask our students to do?

A LOT!!!



unfilleds
dealing with special messages
scanning
inventory
contacting other libraries
patron notification
processing incoming mail
paging items
following up on
overdue items
special projects
custom holdings
projects
creating on-the-fly records
checking out items
packaging items
for shipping
tracking ILL items
on hold shelf
processing review requests
incoming Ariel & E-Delivery
checking local holdings



Like I said . . .

A LOT!!



So what did training look like?



- Lots of one-on-one (or one-on-two) time-intensive training sessions
- Constant coordination with Evening Supervisor
- Repetition
- Difficulty in training all students on some infrequent processes
- Challenges in tracking job progress



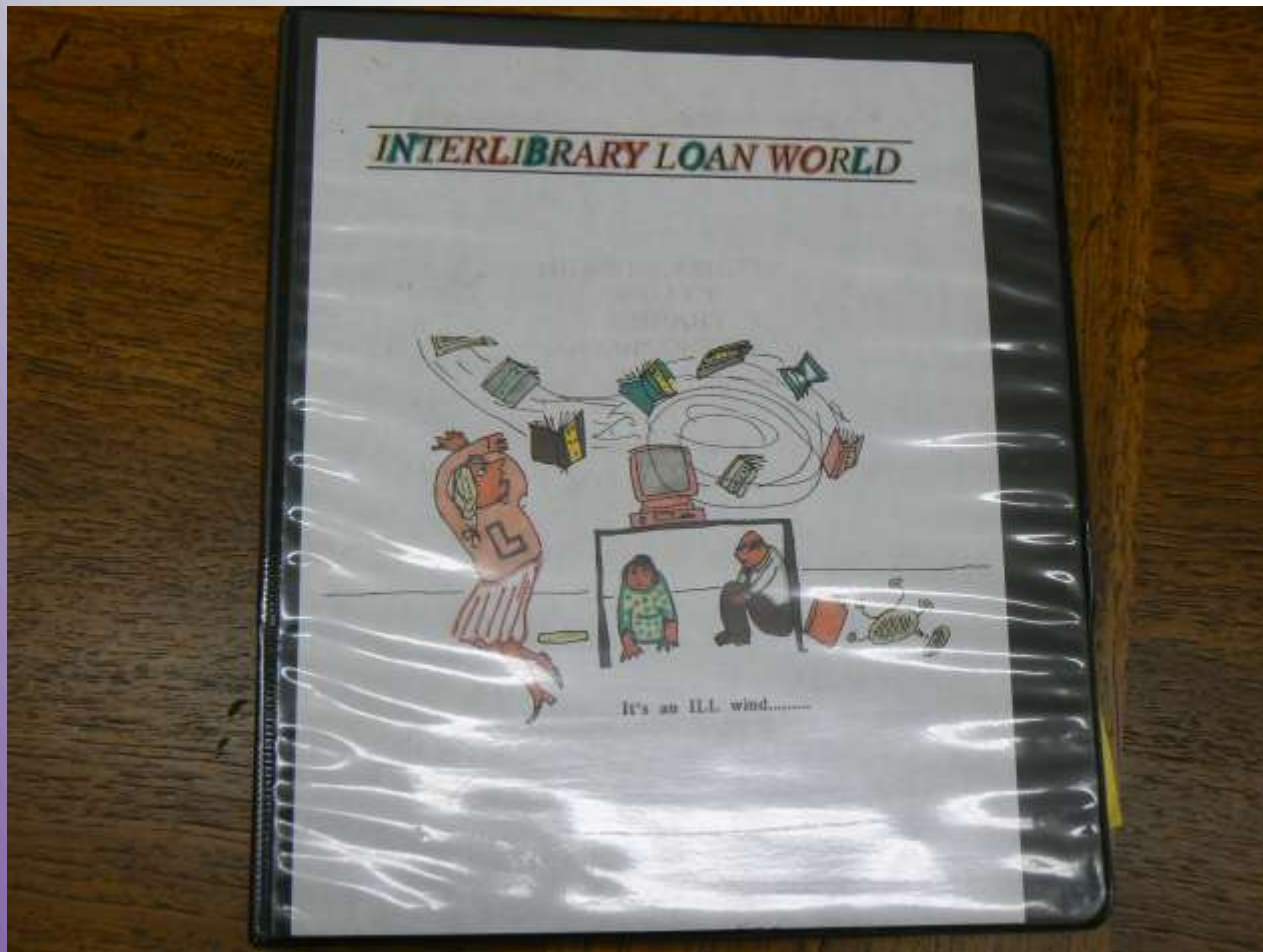
What was our point of
reference?



Presenting . . .



The Manual of Last Resort

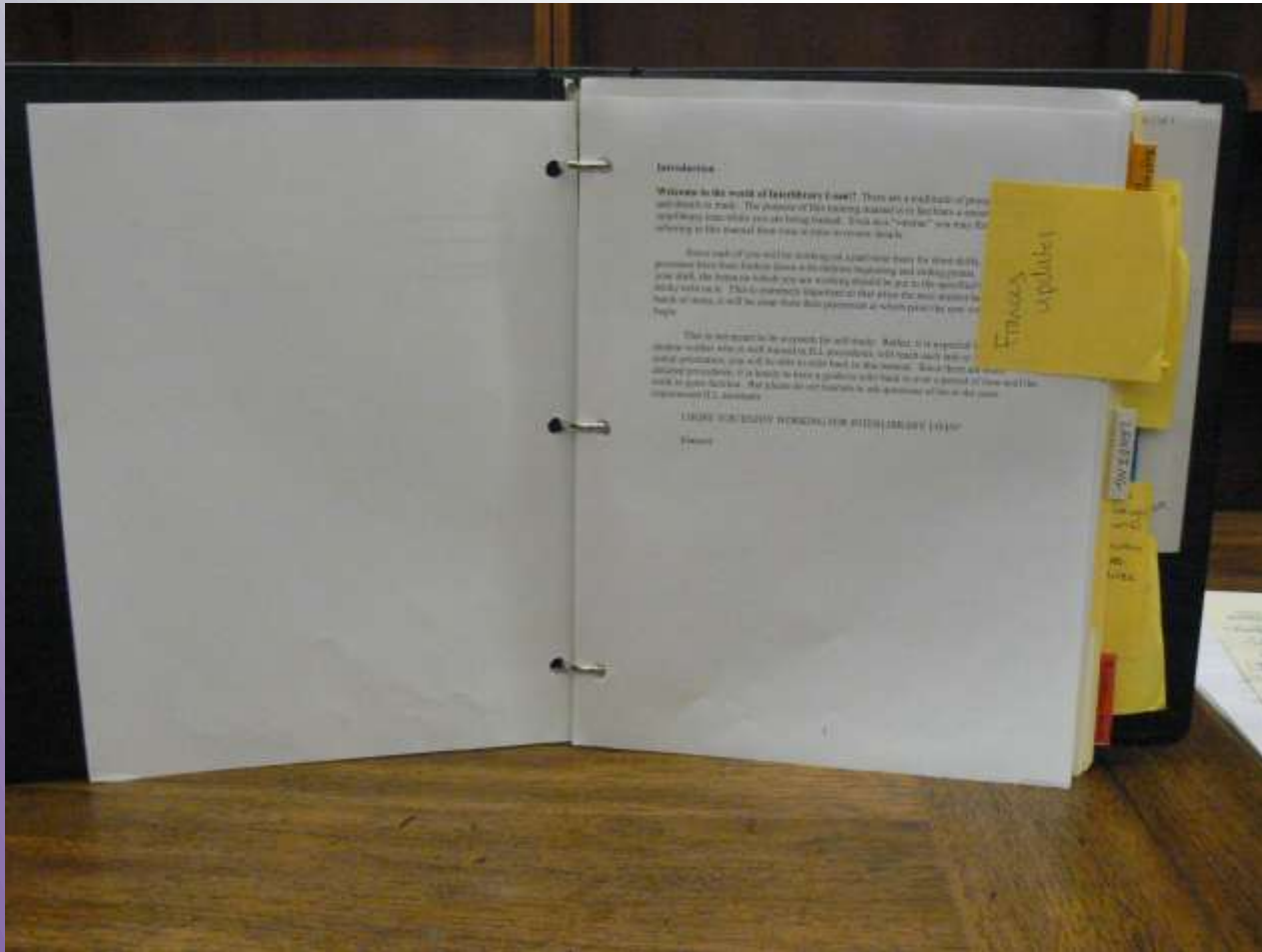


The table of contents might help you find what you're looking for . . .

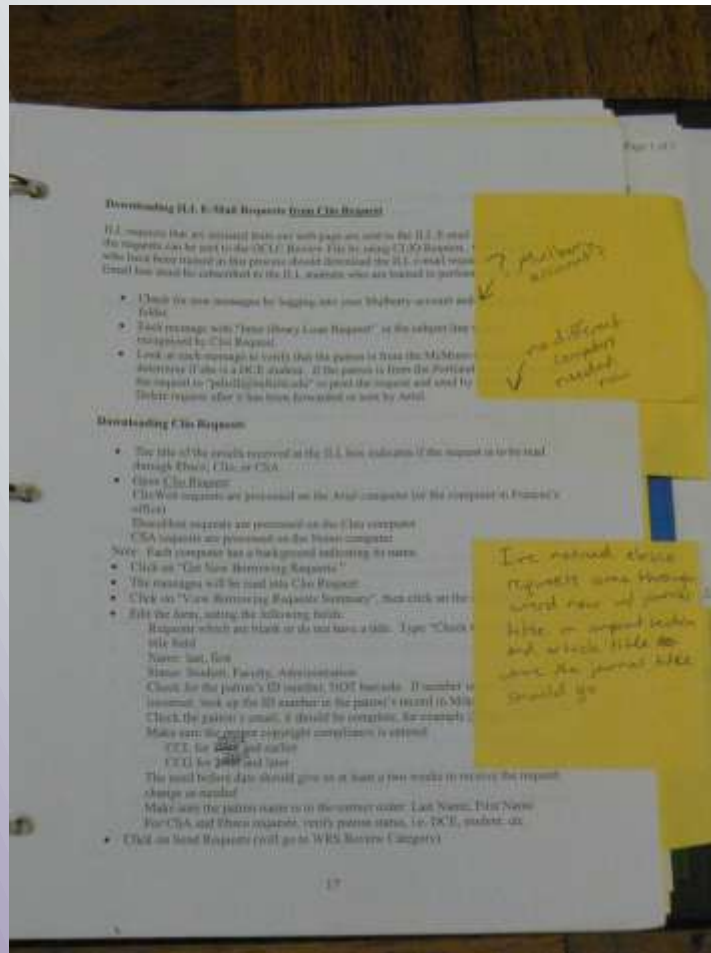
TABLE OF CONTENTS	
Introduction	_____
Reference Information	
Safety & Hazardous Materials	_____
What to do when Frances is Away	_____
Interlibrary Loan Systems	_____
ILL Lending Flow Chart	_____
ILL Borrowing Flow Chart	_____
Filing Baskets	_____



. . . but you might need to refer to one of these sticky notes, too . . .



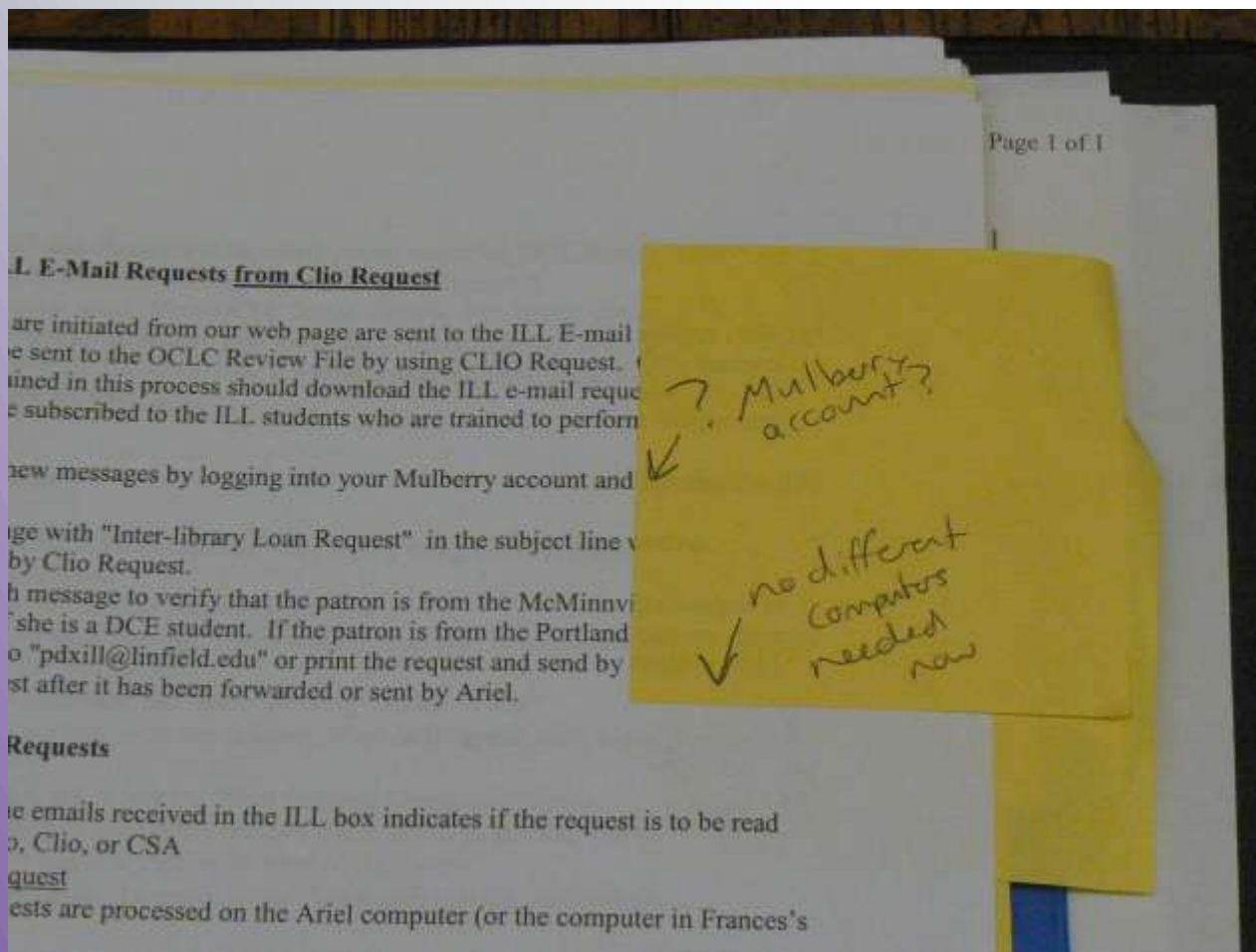
. . . and there sure are a lot of sticky notes . . .



2 missing accounts
✓ no different computer needed

For manual check requests, some things would have to be done like on original books and which title to use the journal title should go

. . . and how do I know these are still even valid?



Rationale



- Length of time since last update
- Things we wanted:
 - Integrate reference materials with training materials for student workers
 - Ability to update content more easily
 - Incorporate web-based tools
 - Evaluation/assessment mechanisms in one place
- Documentation for new Director of Resource Sharing



We needed something better.



2-D to 2.0



Training looks a little bit
different now . . .



Main page of training “manual”

The screenshot displays the Blackboard interface for a user named Kathleen Spring. The top navigation bar includes links for My Places, Home, Help, and Logout. The main content area is titled "ILL Basics" and contains a list of training documents:

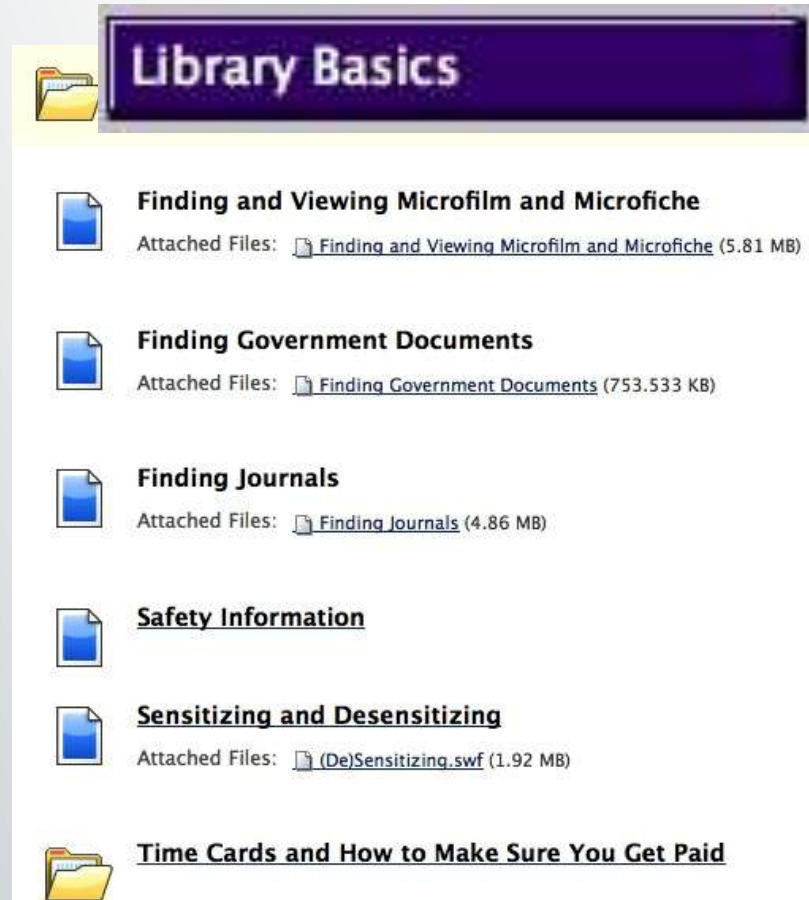
- [What Is Interlibrary Loan?](#)
- [ILL Software](#)
- [Filing System](#)
- [Opening & Closing Procedures](#)
- [OCLC Request Manager Statuses](#)
[Click to view](#)
- [Lending Flowchart](#)
[Lending Flowchart](#)
- [Borrowing Flowchart](#)
[Borrowing Flowchart](#)

The left sidebar shows a navigation menu for "ILL-Training (ILL Training)" with items like ILL Basics, Library Basics, Linfield as Borrower, Linfield as Lender, Mail, Clio, Millennium, Ariel, Language Wiki, and Self-Evaluation. Below this is a "COURSE MANAGEMENT" section with items like Control Panel, Files, Course Tools, Evaluation, and Grade Center.

Leveraging Existing Content (Reduce, Re-use, & Recycle)



Example: Time Cards



Example: Time Cards

Time Cards

- How to Attached
- How to Attached

Mail

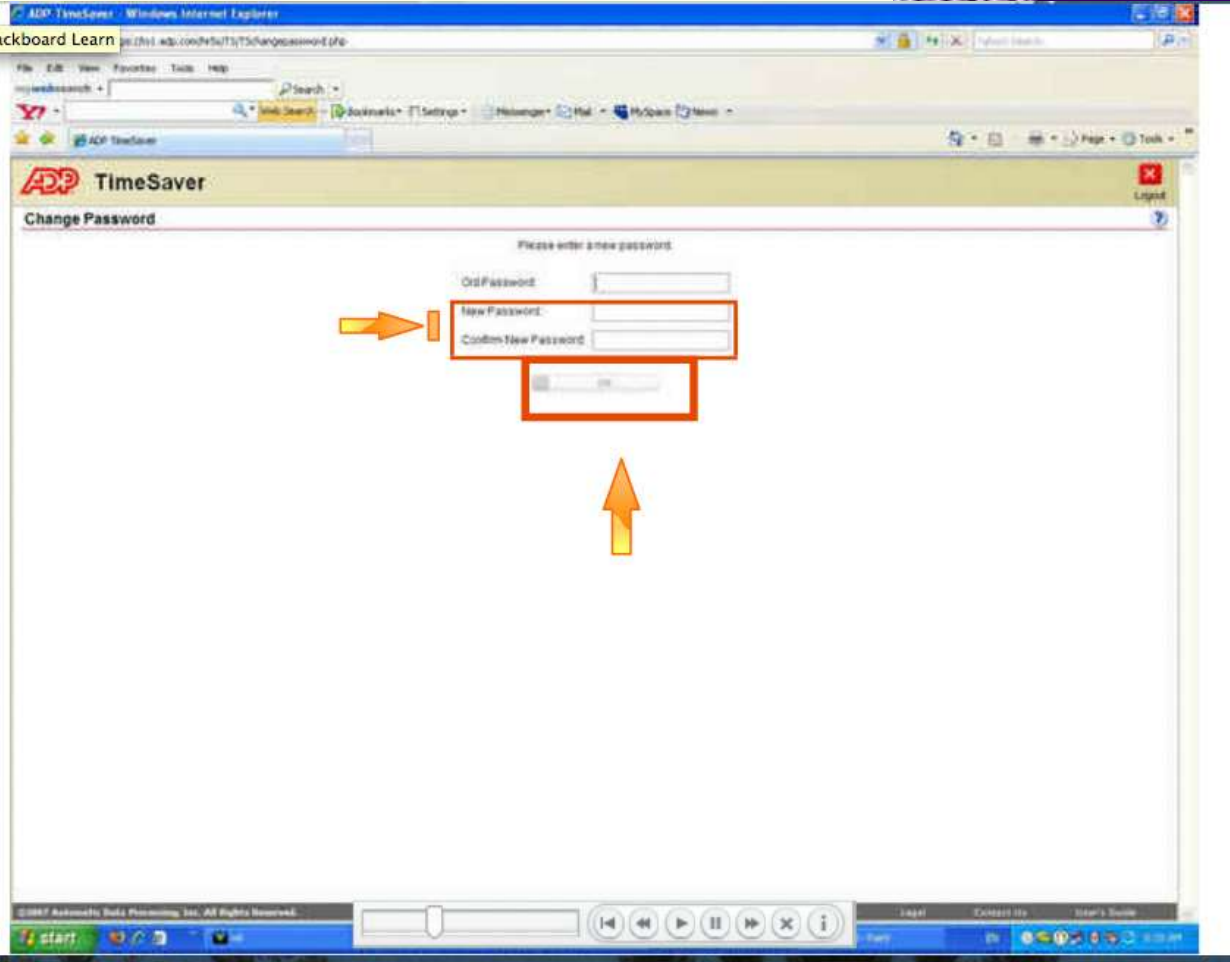
Clio

Millennium

Ariel

Language

Self-Evaluation



The screenshot shows a web browser window displaying the ADP TimeSaver 'Change Password' page. The page title is 'ADP TimeSaver' and the sub-header is 'Change Password'. The main content area contains the instruction 'Please enter a new password' and three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. The 'New Password' and 'Confirm New Password' fields are highlighted with an orange rectangular box. An orange arrow points from the left towards the 'New Password' field. Another orange arrow points upwards towards the bottom of the highlighted box. The browser's address bar shows the URL 'http://adp.com/psu/TS/changepassword.pl?'. The Windows taskbar at the bottom shows the start button, system tray, and the time '11:03 AM' on '1/23/04'.

(5.81 MB)

Interactive Learning & Reference Materials



SoftChalk™

- E-learning authoring tool
- Lets you create interactive web content using a WYSIWYG interface (no programming or HTML knowledge required)
- Can share content via traditional web pages, course management systems, CD-ROM, and various learning object repositories



Why SoftChalk™?

- Relatively inexpensive and easy to use
- Allows for easy chunking of content that can be reused in training materials for other library departments
- Provides interactivity to help student workers retain more of the initial training info



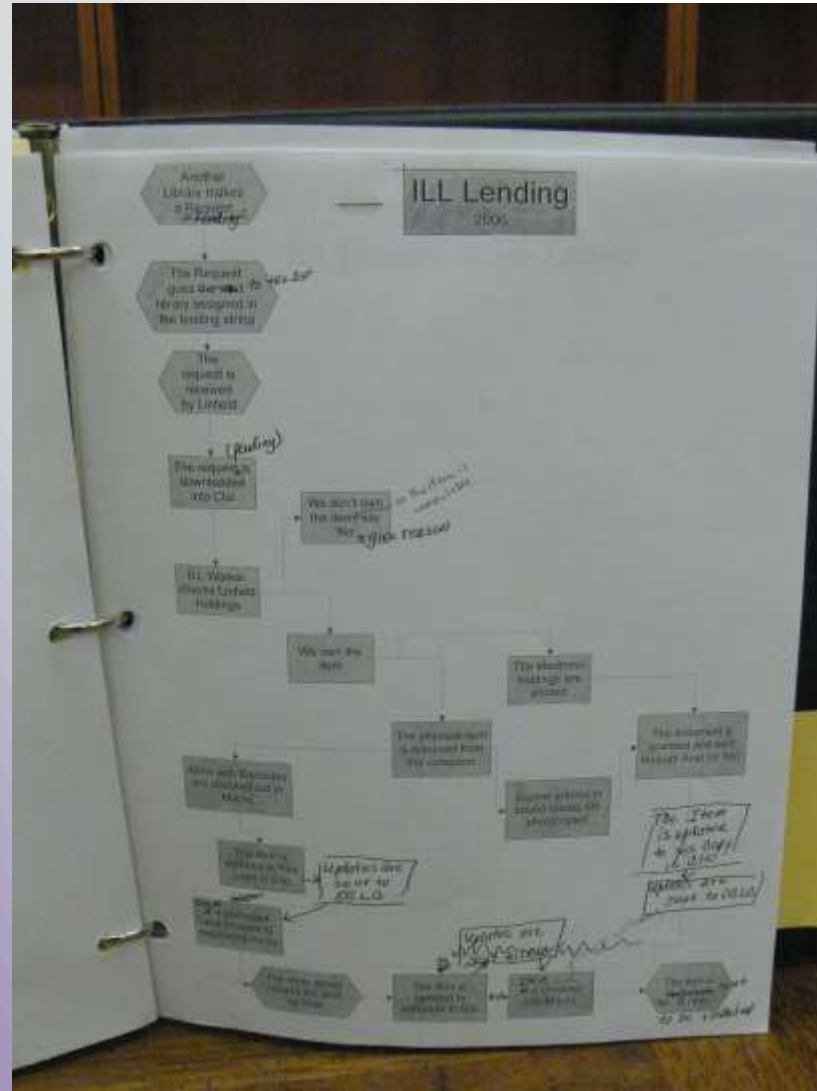
Softchalk™ Features

- Interactive self-check questions, activities, & games
- Text annotation
- Ability to embed media files (images, audio, & video) & widgets
- Complies with accessibility standards
- Ability to add metadata to lessons
- Various scoring options



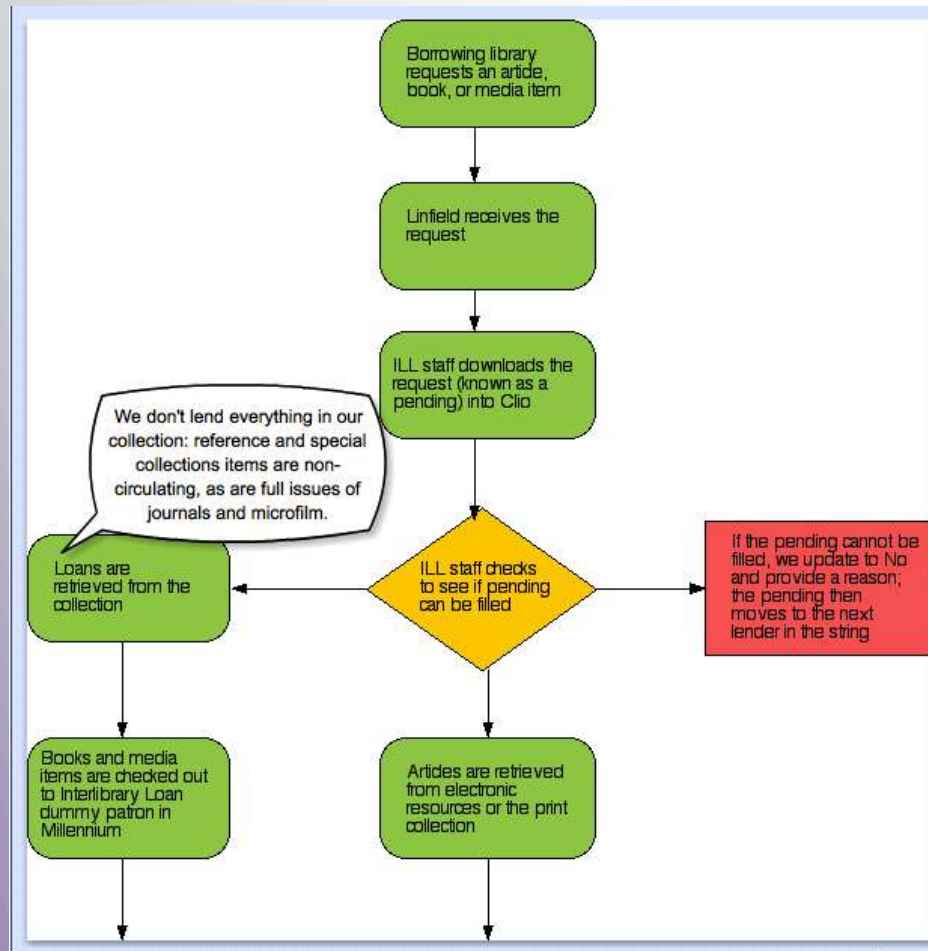
Old ILL Lending Flowchart

B
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Interactive ILL Lending Flowchart

A
F
T
E
R



Comprehension Check

Review Details

Num req this title this year: <input type="text"/>	Title: Chloe	Show All Prev
Publication Date: 2010	TransactionID: 202374	
Place of Publication: Culver City, Calif. :	Verified: <input type="text"/>	
OCLC Number: 607563842		

Book Request Author: Atom Egoyan Publisher: Sony Pictures Home Entertainment Edition: <input type="text"/> Series: <input type="text"/> ISBN: <input type="text"/>	Patron Info Patron Name: Spring, Kathleen Status: Admin Dept: LIBR ID: 0270607 Email: kspring@linfield.edu Phone: 2534 Email Patron
--	--

Article Request Article Title: <input type="text"/> Article Author: <input type="text"/> Volume: <input type="text"/> Issue: <input type="text"/> Date: <input type="text"/> Pages: <input type="text"/> ISSN: <input type="text"/>	Patron Address: Unit Number - A522 Building - Nicholson Library Room-105 Patron Notes/Pick up location: PickUpLoc=////
--	--

StaffID: <input type="text"/>	Ready To Send <input checked="" type="checkbox"/>
Supplier: OCLC	OCLC Service: Direct to Review
Locations(max 5): <input type="text"/>	Ordered <input type="checkbox"/> Lenders:
	Copyright: CCG
	Borrowing Note: ClicID: 202374////Free lender. Member of LWS & Summit. Prefer Ariel transmissions.
	Payment Method: IFM
	Max Cost: <input type="text"/>
	Need Before: 2/3/2011
	Ship Via: <input type="text"/>

Previous Next Print Bib Details Check Local Holdings Delete Record Close

Record: 1 of 2 No Filter Search

Form View Num Lock



Comprehension Check

The patron's name is correctly entered in this example.

True

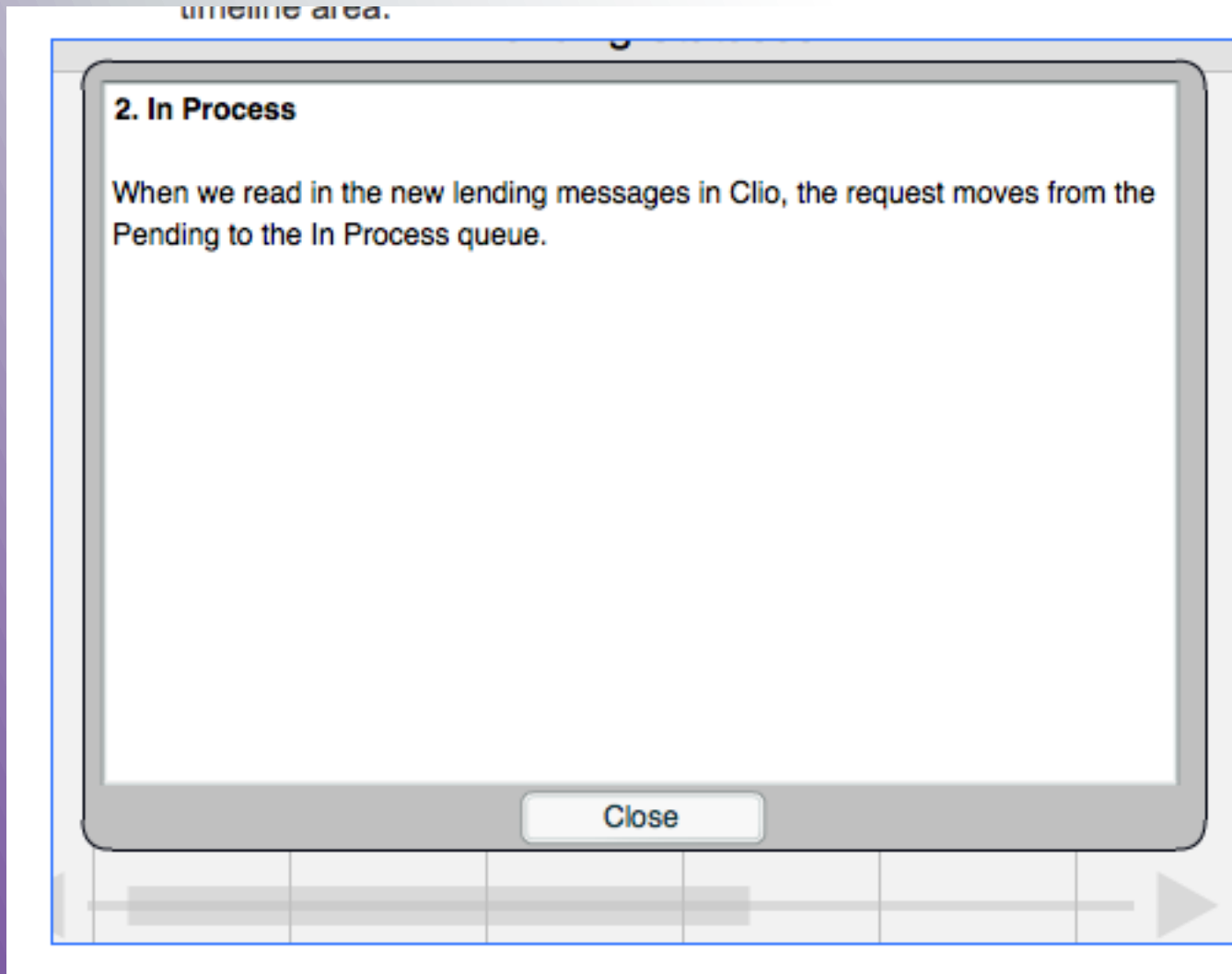
False

Check Answer

Correct!



Timelines with Pop-ups



Order of Processes



So do you know the order to process Summit rejects? Drag items from the left column to the right column and put them in the correct order. You won't be able to place an item in a slot unless it is the correct one.

Check to see whether the patron already has an active request for the item

Check item availability from Summit

Make a new ILL request from a blank workflow

Check for equivalent editions that are available from Summit

If available from Summit, attempt to request via Staff Mode in NRE

Indicate SUMMIT REJECT or SUMMIT FAILED in the Notes field

Modify lending string based on whether request is a SUMMIT REJECT or SUMMIT FAILED request



Order of Processes



So do you know the order to process Summit rejects? Drag items from the left column to the right column and put them in the correct order. You won't be able to place an item in a slot unless it is the correct one.

	Check to see whether the patron already has an active request for the item
	Check item availability from Summit
Check for equivalent editions that are available from Summit	If available from Summit, attempt to request via Staff Mode in NRE
Indicate SUMMIT REJECT or SUMMIT FAILED in the Notes field	
Modify lending string based on whether request is a SUMMIT REJECT or SUMMIT FAILED request	
Make a new ILL request from a blank workflow	



Wikis, Videos, & Other Tools



Problem

How do we keep track of which patrons read another language so that we don't have to keep emailing them to verify?



Solution

Build a wiki accessible to all student workers and supervisors



- ILL-Training (ILL Training)
- ILL Basics
- Library Basics
- Linfield as Borrower
- Linfield as Lender
- Mail
- Clio
- Millennium
- Ariel
- Language Wiki
- Self-Evaluation

 **Language Wiki****Patrons Who Read Another Language**

If a patron requests an item in another language, please email to ask if they can read this language (see template in ILL email). Add that, and any other languages they can read to this wiki.

Please add new patrons to the list in alphabetical order **by last name**.

ILL-Training (ILL Training)

ILL Basics

Library Basics

Linfield as Borrower

Linfield as Lender

Mail

Clio

Millennium

Ariel

Language Wiki

Self-Evaluation

 Language Wiki**Patrons Who Read Another Language**

If a patron requests an item in another language, please email to ask if they can read this language (see template in ILL email). Add that, and any other languages they can read to this wiki.

Please add new patrons to the list in alphabetical order **by last name**.



easy instructions to follow

Patrons Who Read Another Language

[Edit Wiki Content](#)

Created By Justyne Triest on Tuesday, May 10, 2011 5:06:55 PM PDT
last modified by Justyne Triest on Monday, July 25, 2011 1:04:37 PM PDT

Denise [REDACTED] - Spanish
Jennifer [REDACTED] - Spanish, French
Thierry [REDACTED] - French
JaeLyn [REDACTED] - French
John [REDACTED] - German
Arminda [REDACTED] - French, Spanish
Juan [REDACTED] - Spanish
Sarah [REDACTED] - Swedish
Olivia [REDACTED] - French
Gudrun [REDACTED] - German
Jesús [REDACTED] - French, Spanish
Masayuki [REDACTED] - Japanese
Christopher [REDACTED] - Japanese
Katie [REDACTED] - Spanish, Catalán
Violeta [REDACTED] - Spanish
Peter [REDACTED] - German
Jade [REDACTED] - German
Sonia [REDACTED] - Spanish
Tonya [REDACTED] (has a student collaborator who reads Chinese, Summer/Fall 2011)
Fatima [REDACTED] - Spanish

≡ [Comments: 0](#)

[Comment](#)



Problem

How can we share information that all student workers need to know, especially if there is a visual component to the information?



Solution

Use short videos or screen captures to introduce information and reinforce in-person training



Example: Millennium Backdating

The screenshot shows the Millennium Circulation interface for Linfield College Library. The window title is "Millennium Circulation · Linfield College Library". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Admin", and "Help". The main heading is "Check-In (No Patron)".

On the left sidebar, there are several navigation icons: Millennium, Circulation Desk, Check-In, Search / Holds, Count Use, INN-Reach, Pickup Anywhere, and Course Reserves.

The main content area is divided into several sections:

- Key or Scan Item Barcode:** A text input field and a "Search" button.
- Check-In Date:** Displays "Wed Jun 13 2007" and a "Backdate" button (highlighted with a red box).
- Fines:** A "Total:" label followed by a text input field containing "\$0.00".
- Table:** A table with columns: Barcode, Call Num, Title, Patron Name, Amount Due, and Status. The table is currently empty.

At the bottom of the window, there is a status bar with navigation controls.

Example: Millennium Backdating

The screenshot shows the Millennium Circulation interface for Linfield College Library. The main window is titled "Check-In (No Patron)" and contains a search bar, a "Search" button, and a "Check-In Date" field. A "Backdate" dialog box is open, displaying a calendar for June 2007. The date June 12, 2007, is highlighted with a red border, indicating the selected backdate. The dialog box also includes "OK" and "Cancel" buttons.

Millennium Circulation · Linfield College Library

File Edit View Go Tools Admin Help

Check-In (No Patron)

View Print Close

Key or Scan Item Barcode

Search

Check-In Date

Wed Jun 13 2007

Barcode

Amount Due Status

\$0.00

Backdate

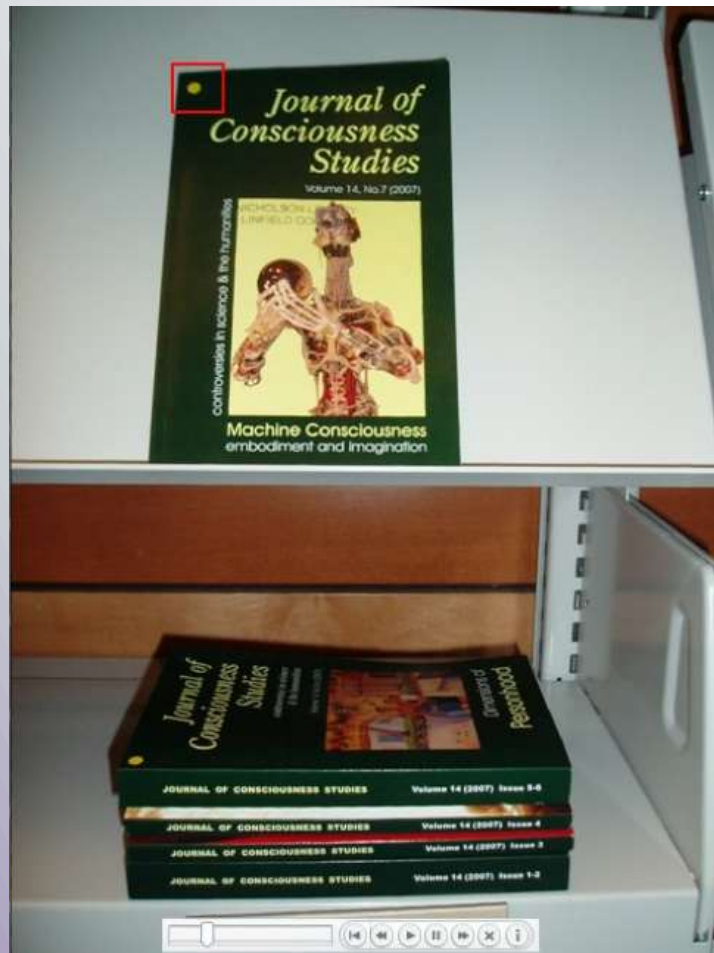
June 13 2007

June 2007

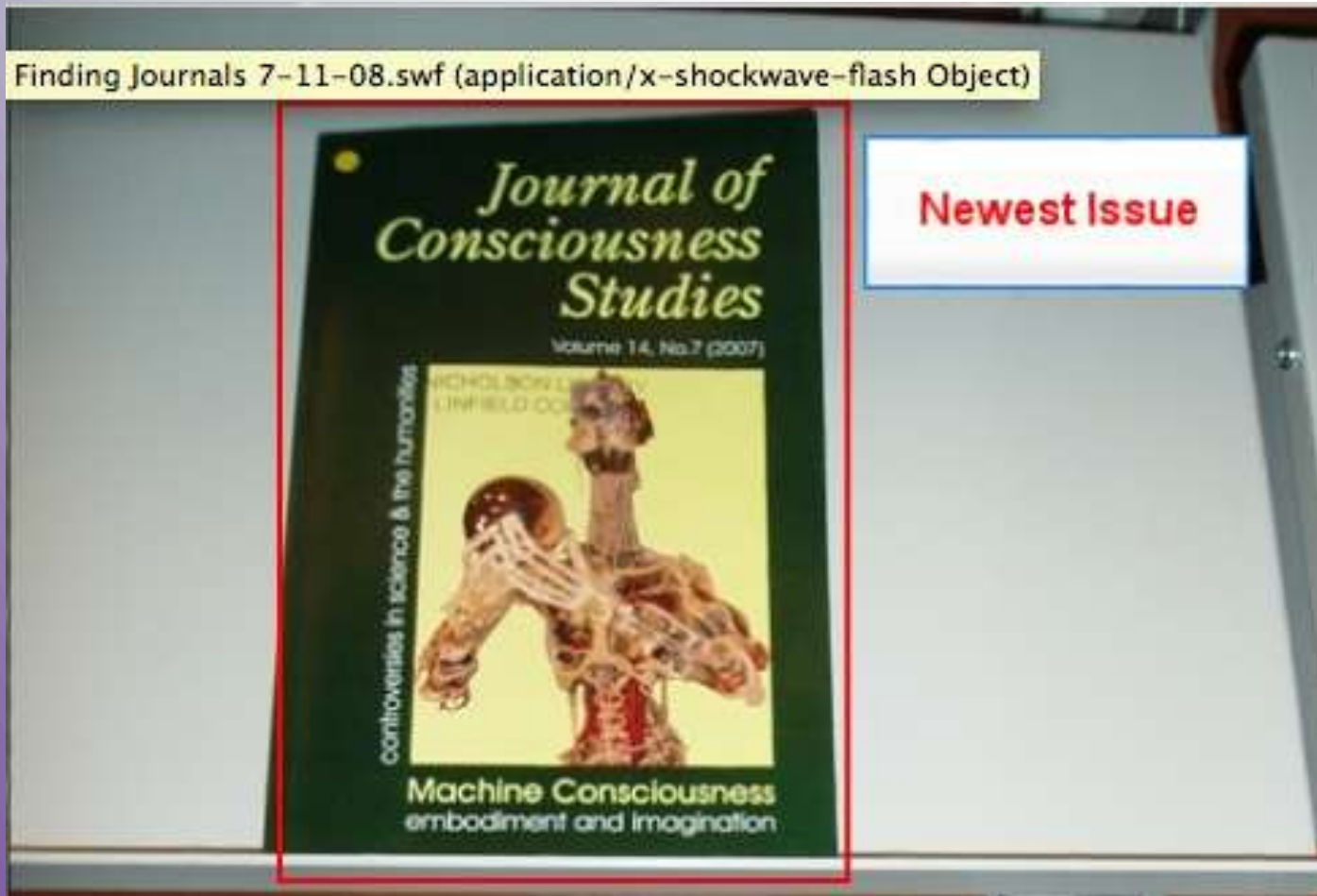
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

OK Cancel

Example: Finding Journals



Example: Finding Journals



Example: Finding Journals



Example: Finding Journals



Example: Finding Journals



Example: Finding Journals

Finding Journals 7-11-08.swf (application/x-shockwave-flash Object) Record: [Prev](#) [Next](#)

<i>Title</i>	The New York times
<i>Imprint</i>	New-York, [N.Y. : H.J. Raymond & Co.], 1857-
<i>Identity</i>	Newspaper
<i>Location</i>	McMin Newspaper
<i>LIB. HAS</i>	Sept.(1851)-Dec(2007)MICROFILM; Current issues shel
<i>Latest Received:</i>	July 10, 2008 v.CLVII no.54367
<i>Identity</i>	Newspaper
<i>Location</i>	McMin Newspaper
<i>LIB. HAS</i>	Sept.(1851)-Dec(2007)MICROFILM; Current issues shel
<i>Location</i>	McMin Newspaper & McMin Microfilm
<i>Descript</i>	v. : ill. ; 59 cm
<i>Frequency</i>	Daily, 1861-
<i>Descript</i>	Daily (except Sunday), 1857-1861
<i>Pub date</i>	Vol. 6, no. 1868 (Sept. 14, 1857)-
<i>Note</i>	Issues for Sept. 19-26, 1923 published jointly with morning newspapers Suspended Dec. 12-28, 1958; Dec. 20, 1962-Mar. 5, 1978 Issued monthly reduced size publication titled: Lit
<i>Alt title</i>	N. Y. times Combined New York morning newspapers Combined New York Sunday newspapers
<i>Continues</i>	New-York daily times (DLC)sn 83030746 (OCoLC)7
<i>ISSN</i>	0362-4331

Record: [Prev](#) [Next](#)

Ideas for More Training Tools

- Voiceover-annotated PowerPoints
- A walking tour podcast of library locations or your ILL department's work space
- Track technology issues via a blog or Google Groups
- Create email templates for frequently sent messages



Assessment



Part I: Skills Completion



B
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ILL Training Plan for

Training Area	Date Identified	Date Completed
Library Requirements		
• Student worker contract		
• Confidentiality policy		
• Emergencies manual		
• MSDS manual		
• Library staff		
• Privacy of library records		
• Procedures for law enforcement		
• Time cards		
• Tour of collections		
Concepts		
• ILL vs. Summit		
• ILL inbox		
• Hold shelf and return shelf		
• Organization of ILL workroom		
• Accessweb		
• Clio		
• Millennium		
• FirstSearch		
• OCLC Policies Directory		
• NRE		
• McMinnville vs. PDX vs. DCE		
Basic Skills		
• Library of Congress call number system		
• Millennium: Checking items in		
• Millennium: Checking items out		
• Millennium: Search/holds		
• Millennium: Renewing/changing due date		
• Millennium: Updating patron record info		
• Millennium: Placing holds		
• Ariel: Importing from scans		
• Ariel: ADF vs. flatbed scanning		

B E F O R E

• Ariel/Chio: Updating to YesCopy		
• Ariel: Paperwork for receiving items		
• Ariel: Held status		
• Ariel: Adding to address book		
• Ariel: Ariel vs. Odyssey addresses		
• E-Delivery: Processing new Ariel items		
• E-Delivery: Reviewing details		
• E-Delivery: Delivering and notifying		
• ChioRequest: Sending requests		
• Chio: Reading new messages (Linfield as Borrower)		
• Chio: Reading new messages (Linfield as Lender)		
• Chio: Sending updates (Linfield as Borrower)		
• Chio: Sending updates (Linfield as Lender)		
• Chio: Searching the database		
• Chio: Updating to Complete		
• Chio: Updating to Returned		
• Chio: Updating to YesCopy		
• Chio: Updating to YesLoan		
• Chio: Updating to RecCopy		
• Chio: Updating to RecLoan		
• Chio: Reviewing new lending items		
• Chio: Libraries database		
• FirstSearch: Searching the Policies Directory		
• FirstSearch: Request Manager categories		
• FirstSearch: Searching for active requests		
• FirstSearch: Searching for closed requests		
• FirstSearch: Printing		
• Packaging for USPS		
• Packaging for courier		
• Packaging for UPS/Fed Ex		
• Mailing to DCE students		
• Scanning from copier		



BEFORE

• Desensitizing/sensitizing		
• Email templates and protocol		
• Checking for overdue/not-yet-picked-up items on hold shelf		
• Phone/voicemail protocol		
• Changing toner		
• Fax machine operation		
• Microfilm machine operation		
• Filling out customs form		
Intermediate Skills		
• Millennium: On-the-fly record creation		
• Millennium: Damaged status		
• Ariel: Send to patron feature		
• Ariel: Sending to non-IP address		
• Ariel: Duplexing		
• Ariel: Dithering options		
• Ariel: Clearing the send queue		
• Ariel: Non-standard ILL#s as document IDs		
• E-Delivery: Waiting for Shipped		
• E-Delivery: Unmatched request IDs		
• ChioRequest: Reviewing patron info		
• ChioRequest: Reviewing item/article info		
• ChioRequest: Reviewing need before date		
• ChioRequest: Copyright compliance		
• ChioRequest: Journal/title info for EBSCO requests		
• Chio: OCLC & ISO Items for Review (Borrower)		
• Chio: OCLC & ISO Items for Review (Lender)		
• FirstSearch: Searching for bibliographic records		
• FirstSearch: Custom holdings paths		
• FirstSearch: Choosing lenders and EMST libraries		
• FirstSearch: Deleting duplicate/invalid requests		



BEFORE

• Renewal Requests (Linfield as Borrower)		
• Renewal Requests (Linfield as Lender)		
• Conditional Messages (Linfield as Borrower)		
• Conditional Messages (Linfield as Lender)		
• Recalled Requests (Linfield as Borrower)		
• Recalls (Linfield as Lender)		
Advanced Skills		
• Summit Rejects vs. Summit Faileds		
• Requesting in Staff Mode in NRE		
• Checking status of Summit request in NRE		
• Unfilleds		
• Saved Requests		
• Expired Requests		
• Retry Requests		
• Recalled Requests (Linfield as Lender)		
• FirstSearch: Special Messages (Borrower)		
• FirstSearch: Special Messages (Lender)		
• Conditional/Retry Pendings		



A
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COURSE MANAGEMENT

⌵ Control Panel

⌵ Files

ILL-Training

Go

Basic Search

⌵ Course Tools

⌵ Evaluation

⌵ **Grade Center**

Needs Grading

Full Grade Center ←

Assignments

Tests

Skills Become “Assignments”

Kathleen Spring My Places Home Help Logout

Linfield College

My Linfield Blackboard Page Courses Scholar

Training)

- ILL Basics
- Library Basics
- Linfield as Borrower
- Linfield as Lender
- Mail
- Clio
- Millennium
- Ariel
- Language Wiki
- Self-Evaluation

COURSE MANAGEMENT

- Control Panel
- Files
- Course Tools
- Evaluation

In the Screen Reader mode, the table is static and grades may be entered on the Grade Details page accessed by selecting the table cell for the grade. In the interactive mode of the Grade Center, grades can be typed directly in the cells. Use the arrow keys or the tab key to navigate through the Grade Center and the Enter key to submit a grade. [More Help](#)

Create Column Create Calculated Column Manage Reports Filter Work Offline

Move To Top Email Sort Columns By: Layout Position Order: Ascending

Grade Information Bar Packaging for UPS/Fed Ex Grade Type: Grade Points Possible: 0 Last Saved: May 23, 2011 9:36 PM

Last Name	First Name	FirstSearch: Pr	Packaging for	Packaging for	Packaging for	Mailing to DCI	Scanning from
		✓	✓	✓	✓	Packaging for UPS/Fed Ex	✓
		✓	✓	✓	✓	✓	✓
		--	--	--	--	--	--
		✓	✓	✓	✓	✓	✓
		✓	✓	✓	✓	✓	✓
		--	--	--	--	--	--

Selected Rows: 0

Move To Top Email Icon Legend Edit Rows Displayed

Point of Assessment Feedback

ClioRequest: S	FirstSearch: Se	FirstSearch: Re	FirstSearch:
✓	✓	✓	✓
✓	✓	✓	✓
--			
✓			
✓			
--			

Feedback to User

abc ✓

Grading Notes

abc ✓

Text Editor Cancel Submit

External & Internal Feedback

ClioRequest: S	FirstSearch: Se	FirstSearch: Re	FirstSearch
✓	✓	✓	✓
✓	✓	✓	✓
--			
✓			
✓			
--			

Feedback to User

Don't forget that you can also search the policies directory by institution name - just select that option from the drop-down menu.

Grading Notes

Text Editor

Cancel

Submit

Skills Completion At-a-Glance

Student Details		
User	[REDACTED]	
Student ID	[REDACTED]	
Contact	Phone (Home) Phone (Work) [REDACTED]@linfield.edu	
Items Completed	83% (92 of 111)	

Category Statistics		
Category	Average	Graded
Survey	0%	1
Library Requirements	0%	9
Concepts	0%	10
Basic Skills	0%	48
Intermediate Skills	0%	20
Advanced Skills	0%	4

Part II: Performance Evaluations



B
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R
E

NAME _____ DATE OF EVALUATION _____ SEMESTER HIRED _____

I-9 _____ W-4 _____ REFERRAL FORM _____

JERELD R. NICHOLSON LIBRARY
ILL STUDENT TRAINING CHECKLIST



TASK	TRAINED?	TASK	TRAINED?
LIBRARY BASICS:		- Need before date	
Contract signed and understood		Sending requests	
Confidentiality policy signed		CLIO:	
Emergencies & MSDS		OCLC	
Library staff		OCLC & ISO items for review	
Procedures for law enforcement		Searching	
Privacy of library records		Updating	
Time cards		- Complete	
Library of Congress call # (LC Easy)		- Returned	
Desensitizing/sensitizing items		- YesCopy/YesLoan	
ILL inbox		- RecCopy/RecLoan	
ILL hold shelf		- Special categories	
MILLENNIUM:		Review new lending items	
Checking items in and out		Libraries Database	
Renewing/Changing Due Date		FIRST SEARCH (OCLC):	
Patron records – updating info		Request Manager	
On-the-fly record creation		Policies Directory	
Damaged status		Searching	
ARIEL:		Printing	
Sending items		Special categories	
- Scanning via copier and importing		- Unfilled	
- ADF vs. flatbed scanning and duplexing		- Save	
- Adding to address book		- Renewal OK/Denied	
- Send to patron feature		- Conditional	
- Sending to non-IP address		- Recalled	
- Clearing the send queue		- Expired	
- Updating to YesCopy		- Retry	
Receiving items		- Special messages/borrower	
- Paperwork		- Conditional/Retry pending	
- Held status		- Renewal Request	
- Non-standard ILLs as document ID		- Special messages/lender	
CLIO E-DELIVERY:		Processing requests	
Processing new Ariel items		- Custom holdings paths	
Reviewing details		- Choosing lenders & EMST	
Deliver and notify		- Deleting duplicates & invalids	
Unmatched request IDs		Summit rejects vs. Summit fails	
Items waiting for Shipped message		NRE	
Sending updates		Summit request in Staff Mode	
Accessweb		Checking status of Summit request	
CLIO REQUEST:		MACHINES:	
Reviewing new requests		Operation (Fax, Photocopiers, and Microfilm reader/printer)	
- Patron info		Paper & Jams (Fax, Photocopiers, and Microfilm reader/printer)	
- Item/article info		Toner (Fax, Photocopiers, and Microfilm reader/printer)	
- Copyright compliance			



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NAME _____ DATE OF EVALUATION _____ SEMESTER HIRED _____

I-9 _____ W-4 _____ REFERRAL FORM _____

JERELD R. NICHOLSON LIBRARY

ILL STUDENT TRAINING CHECKLIST

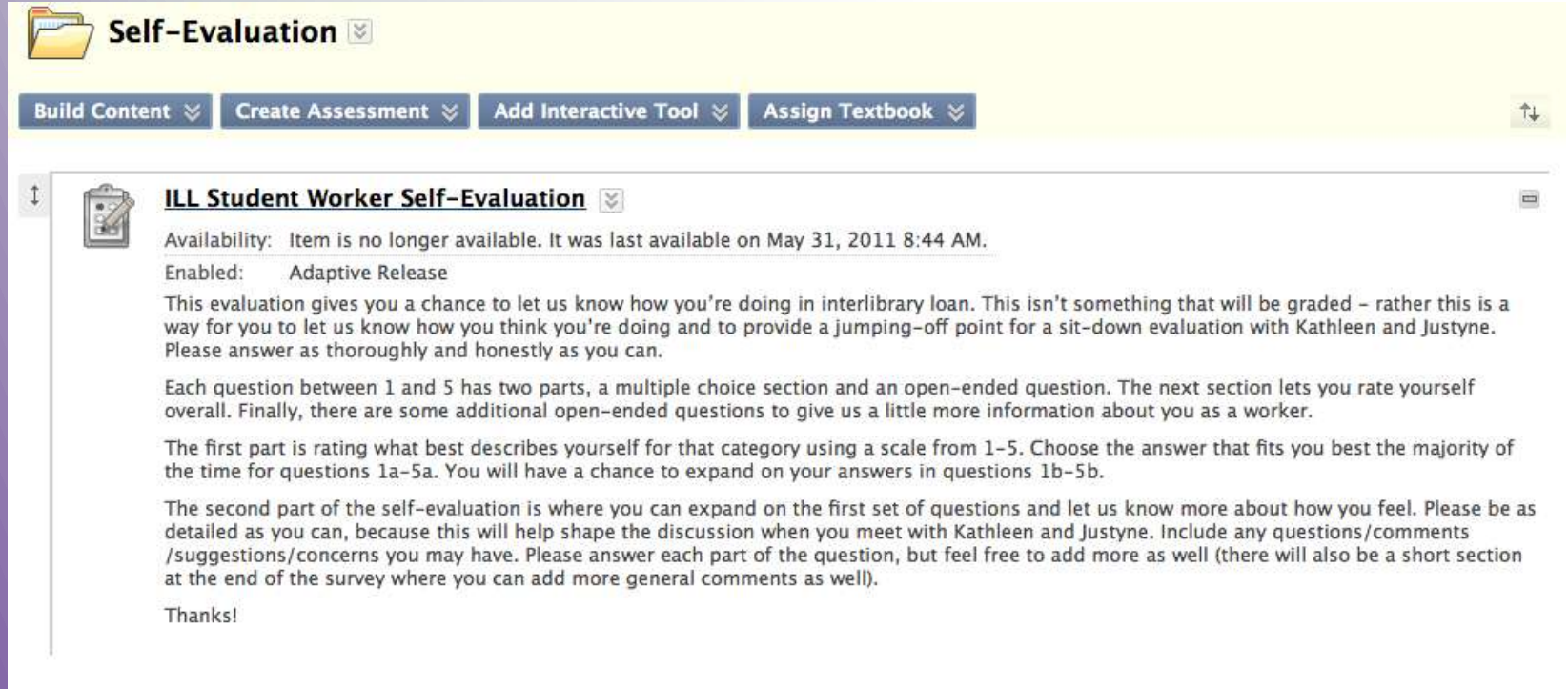


TASK	TRAINED?	TASK	TRAINED?
LIBRARY BASICS:		Feed before date	
Contract signed and understood		Printing requests	
Confidentiality policy signed		IO:	
Emergencies & MSDS		LC	
Library staff		LC & ISO items for review	
Procedures for law enforcement		Printing	
Privacy of library records		Printing	
Time cards		Printing	
Library of Congress call # (LC Easy)		Printing	
Desensitizing/sensitizing items		Printing	
ILL inbox		Printing	
ILL hold shelf		Printing	
Patron records – updating info		FIRST SEARCH (OCLC):	
On-the-fly record creation		Request Manager	
Damaged status		Policies Directory	
ARIEL:		Searching	
Sending items		Printing	
- Scanning via copier and importing		Special categories	
- ADF vs. flatbed scanning and duplexing		- Unfilled	
- Adding to address book		- Save	
- Send to patron feature		- Renewal OK/Denied	
- Sending to non-IP address		- Conditional	
- Clearing the send queue		- Recalled	
- Updating to YesCopy		- Expired	
Receiving items		- Retry	
- Paperwork		- Special messages/borrower	
CLIO E-DELIVERY:		- Conditional/Retry pending	
Processing new Ariel items		- Renewal Request	
Reviewing details		- Special messages/lender	
Deliver and notify		Processing requests	
Unmatched request IDs		- Custom holdings paths	
Items waiting for Shipped message		- Choosing lenders & EMST	
Sending updates		- Deleting duplicates & invalids	
Accessweb		Summit rejects vs. Summit faileds	
CLIO REQUEST:		Open Microfilm reader/printer	
Reviewing new requests		Paper & Jams (Fax, Photocopiers, and Microfilm reader/printer)	
- Patron info		Toner (Fax, Photocopiers, and Microfilm reader/printer)	
- Item/article info			
- Copyright compliance			



Self-Evaluation

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The screenshot displays a Blackboard LMS interface. At the top, there is a yellow header bar with a folder icon and the text "Self-Evaluation" with a dropdown arrow. Below this is a navigation bar with four buttons: "Build Content", "Create Assessment", "Add Interactive Tool", and "Assign Textbook", each with a dropdown arrow. On the right side of the navigation bar is a vertical double-headed arrow icon. Below the navigation bar is a list of items. The first item is "ILL Student Worker Self-Evaluation" with a dropdown arrow and a small icon of a clipboard with a checklist. To the left of the item list is a vertical double-headed arrow icon. The item details are as follows:

Availability: Item is no longer available. It was last available on May 31, 2011 8:44 AM.

Enabled: Adaptive Release

This evaluation gives you a chance to let us know how you're doing in interlibrary loan. This isn't something that will be graded – rather this is a way for you to let us know how you think you're doing and to provide a jumping-off point for a sit-down evaluation with Kathleen and Justyne. Please answer as thoroughly and honestly as you can.

Each question between 1 and 5 has two parts, a multiple choice section and an open-ended question. The next section lets you rate yourself overall. Finally, there are some additional open-ended questions to give us a little more information about you as a worker.

The first part is rating what best describes yourself for that category using a scale from 1-5. Choose the answer that fits you best the majority of the time for questions 1a-5a. You will have a chance to expand on your answers in questions 1b-5b.

The second part of the self-evaluation is where you can expand on the first set of questions and let us know more about how you feel. Please be as detailed as you can, because this will help shape the discussion when you meet with Kathleen and Justyne. Include any questions/comments /suggestions/concerns you may have. Please answer each part of the question, but feel free to add more as well (there will also be a short section at the end of the survey where you can add more general comments as well).

Thanks!

Sample Question

Question 1

How knowledgeable do you feel overall about the regular, day-to-day ILL work and daily tasks?

- 1. Not knowledgeable at all. How did I even find my way to work today?
- 2. Slightly knowledgeable, but feel that there's still a lot to learn about the daily tasks.
- 3. A decent knowledge base, but there's lots of room for improvement.
- 4. Quite knowledgeable- regular tasks are not a problem.
- 5. Very knowledgeable- regular tasks are a piece of cake, bring on the new ones!



Challenges



- Poor choice of tool for self-evaluation
- Skills completion assessment tracking is clunky
- Deciding what is too complex to try to explain in detail
- Determining how big chunks of content should be
- Devising way to assess new training resources



Tips for Takin' It to the Web



Pick the low-hanging fruit.



Match the tool to the desired
outcome.



Not everything has to have an interactive component.



Plan, plan, plan!



Chunk your content.



Re-use existing content.



Revise as you go.



Successes

- Short video tutorials seen as super useful
- Explanations for less common processes are excellent point of reference
- Ability to include self-testing components within training materials
- Groundwork in place for new Director of Resource Sharing
- Precedent for continual updating



Questions?

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Linfield College