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9-16-2011

"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

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If you don't like my presentation . . .
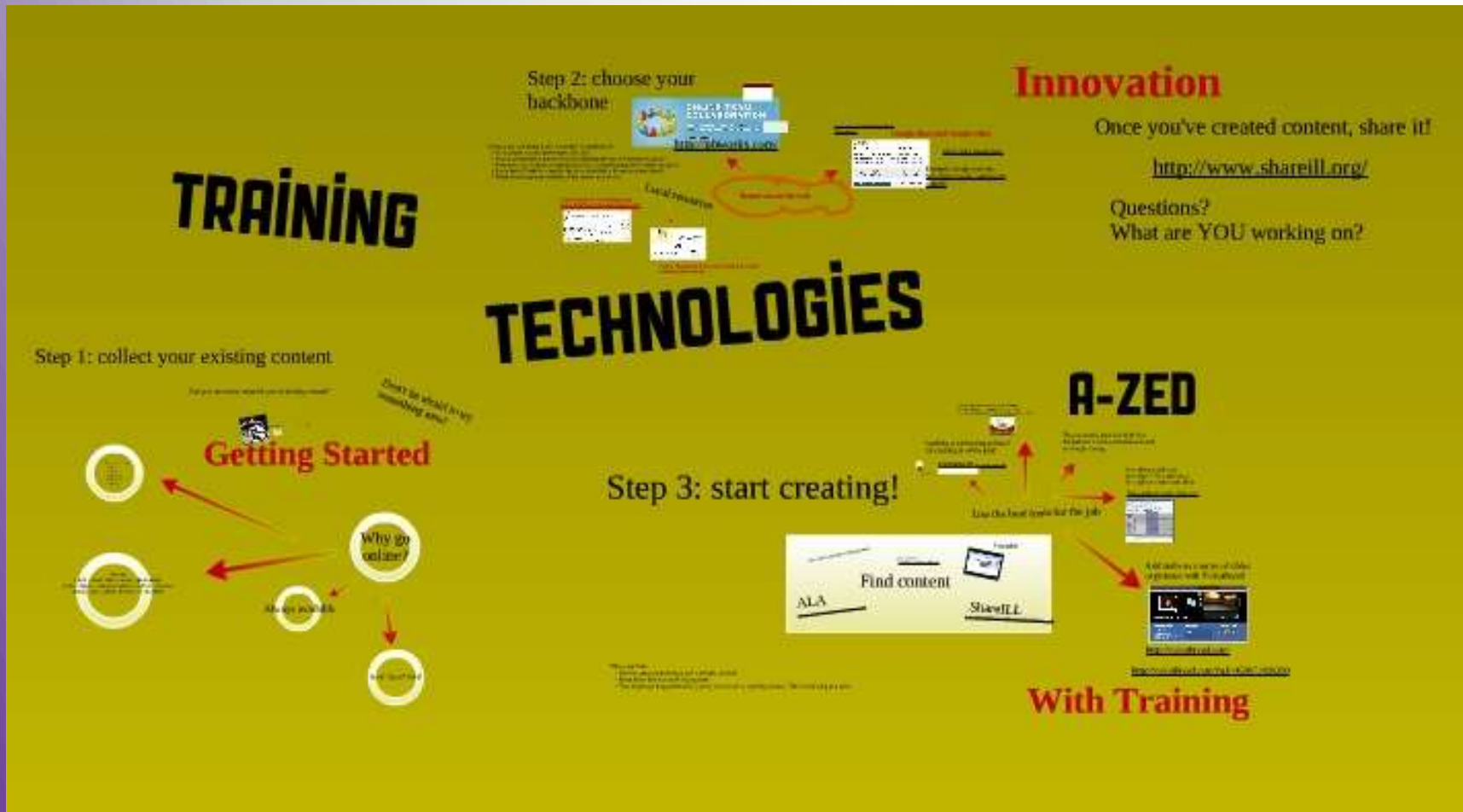
blame Chelle Batchelor!

(just kidding)

☺

NWILL 2010

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

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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!

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Today's Agenda

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

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Status Quo

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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

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Student Responsibilities

What do we ask our students to do?

A LOT!!!

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unfilleds

dealing with special messages

contacting other libraries

scanning

inventory

paging items

patron notification

processing incoming mail

custom holdings projects

special projects

following up on overdue items

checking out items

creating on-the-fly records

packaging items for shipping

tracking ILL items on hold shelf

processing review requests

incoming Ariel & E-Delivery

checking local holdings

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Like I said . . .

A LOT!!

So what did training look like?

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- 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
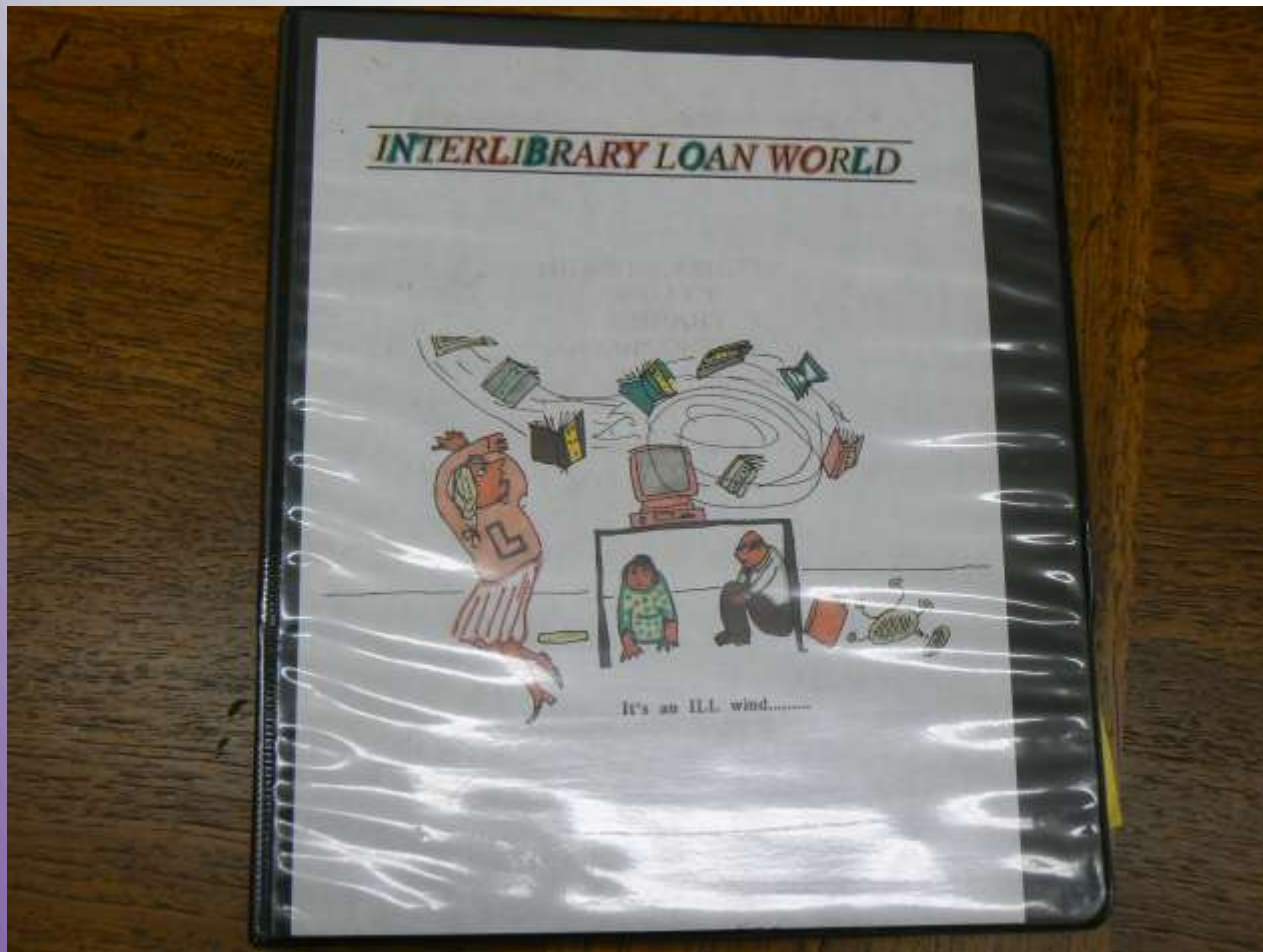- Challenges in tracking job progress

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What was our point of reference?

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Presenting . . .

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The Manual of Last Resort

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

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

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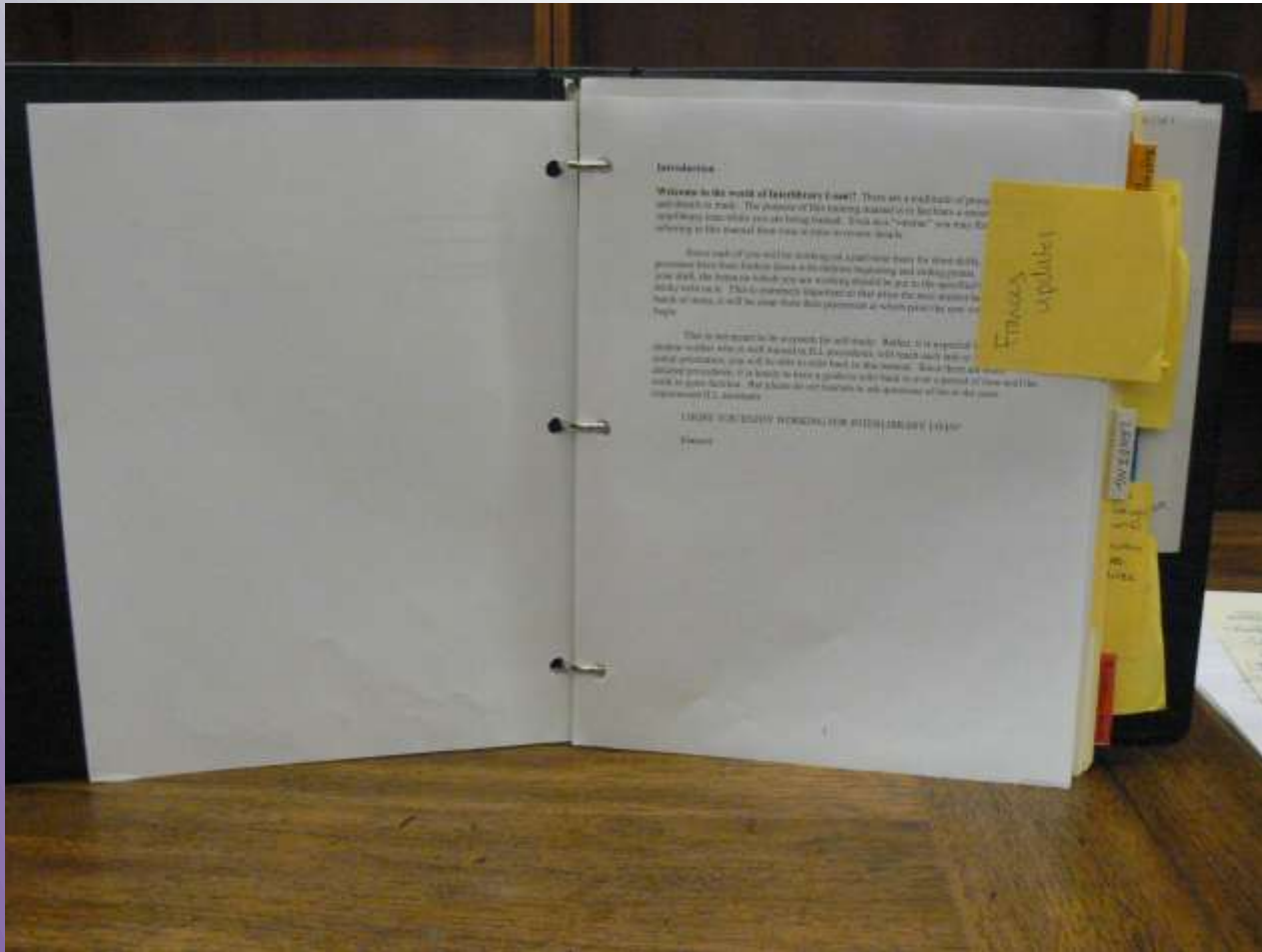
. . . and there sure are a lot of sticky notes . . .
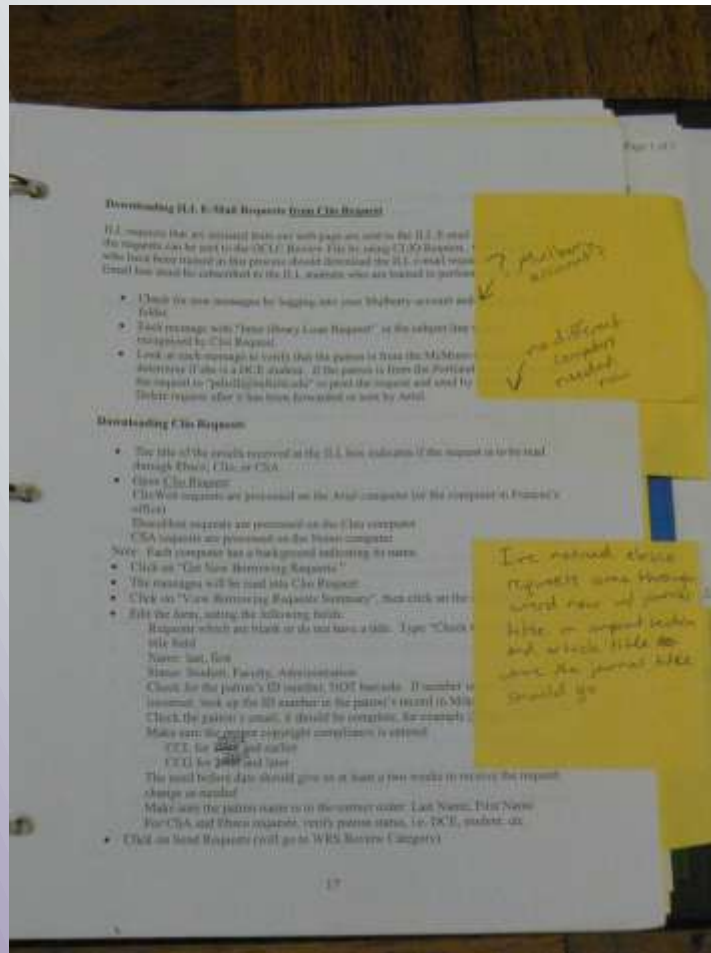
. . . and how do I know these are still even valid?
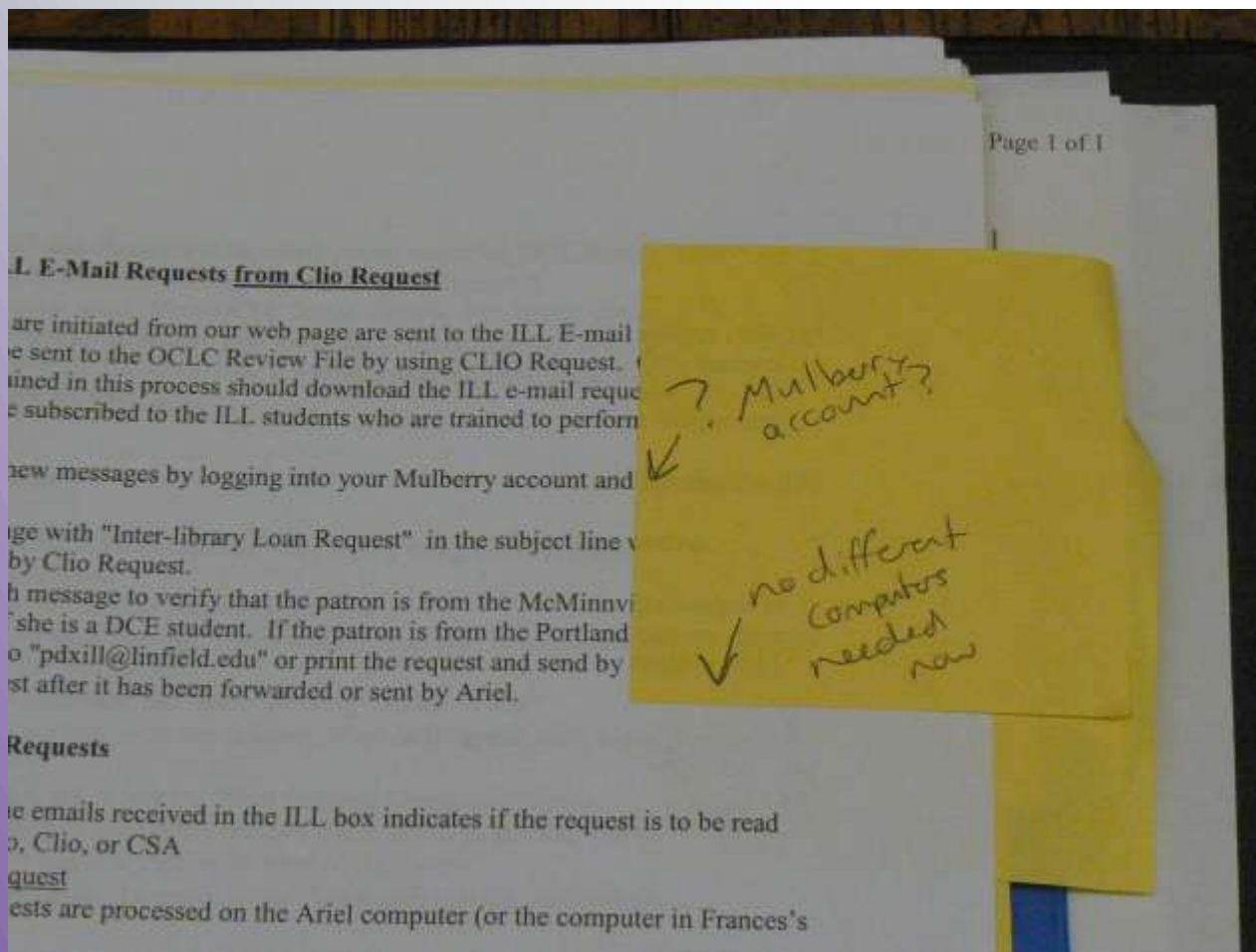
Rationale

- 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

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We needed something better.

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2-D to 2.0

Training looks a little bit different now . . .

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Main page of training "manual"

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

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Example: Time Cards

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Example: Time Cards

Interactive Learning & Reference Materials

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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

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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

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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

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Old ILL Lending Flowchart

B E F O R E

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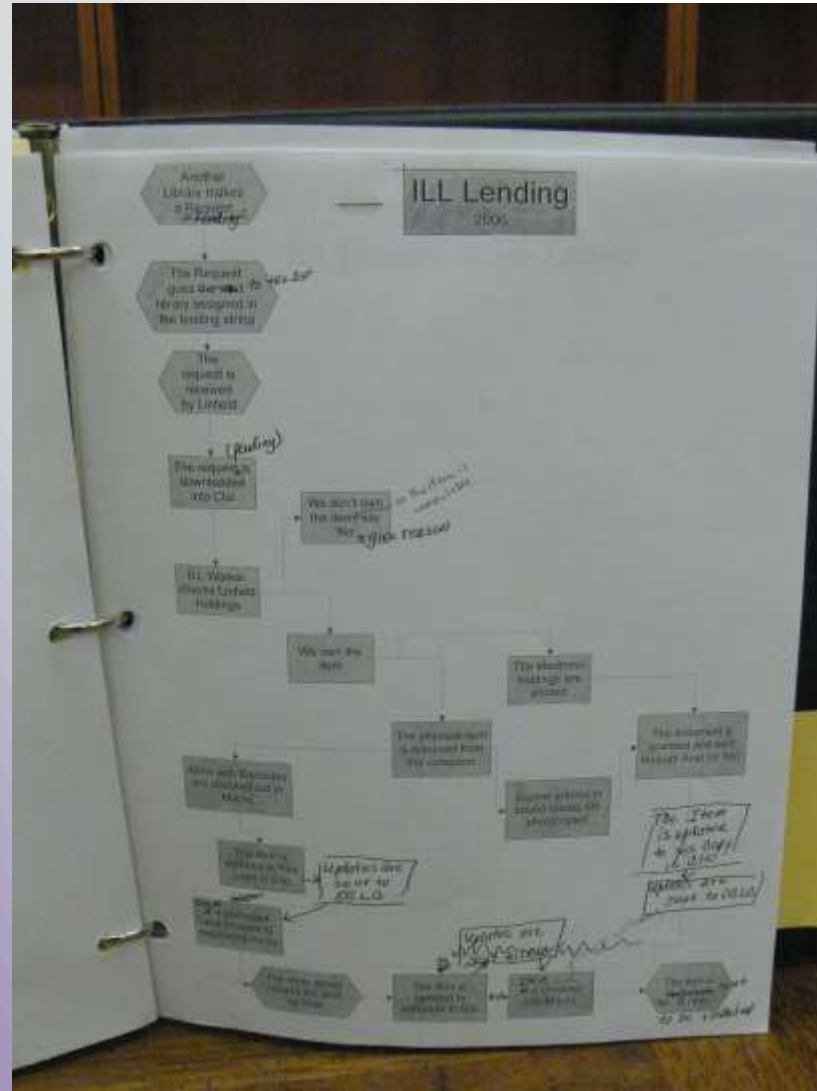
Interactive ILL Lending Flowchart

A F T E R

Comprehension Check

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Comprehension Check

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 workform	
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	

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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 workform	

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Reference Material

International Loans

Occasionally we borrow and lend materials outside the United States. When this happens, we need to fill out the appropriate customs form.

The small customs form (see below) is used for packages weighing less than 4 lbs. Use the scale near the mailboxes in the workroom to determine the weight of the package you will be sending so you know which form to use. Then, follow the instructions on the form, using the image below as a guide. A completed sample of each form is also posted on the bulletin board above the ILL mailing table. Tape the completed form to the package (don't tape it down entirely, as the Post Office will need to remove it for processing). **You will still need to include an address label on the package.**

USPS® Customs Declaration – CN 22

KATHLEEN SPRING
LINFIELD COLLEGE
900 SE BAKER ST, A522
MCMINNVILLE OR 97128 USA
UAB – ILL/DOCUMENT DELIVERY
1-110 RUTHERFORD LIBRARY NORTH
UNIVERSITY OF ALBERTA
EDMONTON, ALBERTA
CANADA T6G 2J4
ILL#12345678

TITLE OF ITEM # ILL#12345678
2 15 75.00

SIGN YOUR NAME HERE 1/24/11

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Wikis, Videos, & Other Tools

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Problem

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

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Solution

Build a wiki accessible to all student workers and supervisors

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☰ ▢ ▭ ⟳

≪ 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**.

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Patrons Who Read Another Language

Edit Wiki Content

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

≫ **Comments: 0**

Comment

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Problem

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

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Solution

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

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Example: Millennium Backdating

Example: Millennium Backdating

Example: Finding Journals

Example: Finding Journals

Example: Finding Journals

Finding Journals 7-11-08.swf (application/x-shockwave-flash Object)

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Example: Finding Journals

Finding Journals 7-11-08.swf (application/x-shockwave-flash Object)

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Example: Finding Journals

Finding Journals 7-11-08.swf (application/x-shockwave-flash Object)

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Example: Finding Journals

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

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Assessment

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Part I: Skills Completion

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B E F O R E

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		

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BEFORE

• Ariel/Clio: 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		
• ClioRequest: Sending requests		
• Clio: Reading new messages (Linfield as Borrower)		
• Clio: Reading new messages (Linfield as Lender)		
• Clio: Sending updates (Linfield as Borrower)		
• Clio: Sending updates (Linfield as Lender)		
• Clio: Searching the database		
• Clio: Updating to Complete		
• Clio: Updating to Returned		
• Clio: Updating to YesCopy		
• Clio: Updating to YesLoan		
• Clio: Updating to RecCopy		
• Clio: Updating to RecLoan		
• Clio: Reviewing new lending items		
• Clio: 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		

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B E F O R E

• 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		
• ClioRequest: Reviewing patron info		
• ClioRequest: Reviewing item/article info		
• ClioRequest: Reviewing need before date		
• ClioRequest: Copyright compliance		
• ClioRequest: Journal/title info for EBSCO requests		
• Clio: OCLC & ISO Items for Review (Borrower)		
• Clio: 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		

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B E F O R E

• 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		

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Skills Become "Assignments"

Point of Assessment Feedback

External & Internal Feedback

Skills Completion At-a-Glance

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Part II:
Performance Evaluations

B E F O 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 ILL#s 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 faileds	
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			

Rev. 9/11/2011

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B E F O R E

NAME_____ DATE OF EVALUATION_____ SEMESTER HIRED_____
I-9___ W-4___ REFERRAL FORM____
JERELD R. NICHOLSON LIBRARY
ILL STUDENT TRAINING CHECKLIST
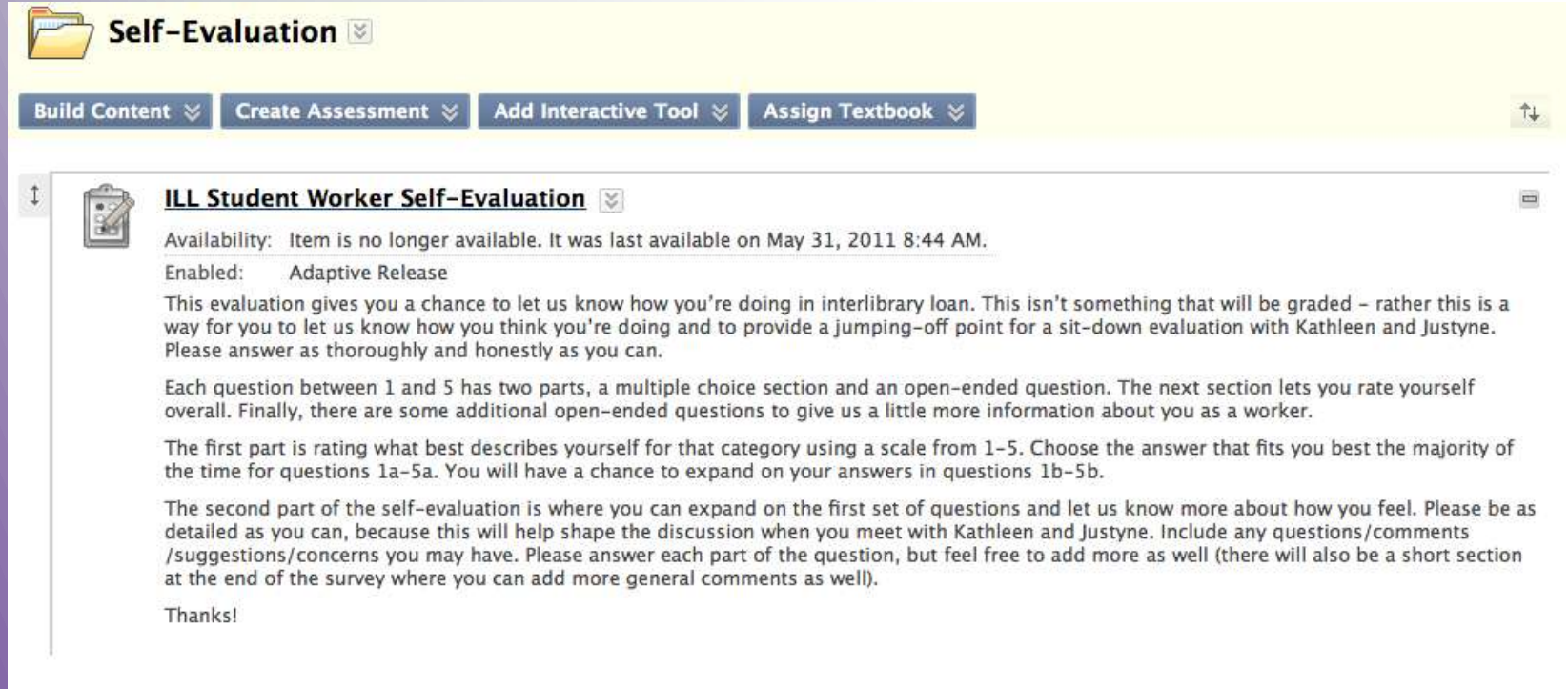
TASK	TRAINED?	TASK	TRAINED?
LIBRARY BASICS:		Need before date	
Contract signed and understood		ding requests	
Confidentiality policy signed		**IO:**	
Emergencies & MSDS		LC	
Library staff		LC & ISO items for review	
Procedures for law enforcement		ching	
Privacy of library records		ating	
Time cards		Complete	
Library of Congress call # (LC Easy)		Returned	
Desensitizing/sensitizing items		YesCopy/YesLoan	
ILL inbox		RecCopy/RecLoan	
ILL hold shelf		Special categories	
Patron records – updating info	Req	iew new lending items	
On-the-fly record creation	Poli	aries Database	
Damaged status	Sear		
ARIEL:	Print		
Sending items	Spec		
- Scanning via copier and importing	- U		
- ADF vs. flatbed scanning and duplexing	- S		
- Adding to address book	- R		
- Send to patron feature	- C		
- Sending to non-IP address	- R		
- Clearing the send queue	- E		
- Updating to YesCopy	- R		
Receiving items	- S		
- Paperwork	- C		
CLIO E-DELIVERY:			
Processing new Ariel items			
Reviewing details			
Deliver and notify			
Unmatched request IDs			
Items waiting for Shipped message			
Sending updates			
Accessweb			

FIRST SEARCH (OCLC):	
Request Manager	
Policies Directory	
Searching	
Printing	
Special categories	
- Unfilled	
- Save	
- Renewal OK/Denied	
- Conditional	
- Recalled	
- Expired	
- Retry	
- Special messages/borrower	
- Conditional/Retry pending	
- Renewal Request	
- Special messages/lender	
Processing requests	
- Custom holdings paths	
- Choosing lenders & EMST	
- Deleting duplicates & invalids	
Summit rejects vs. Summit faileds	

CLIO REQUEST:		MA	
Reviewing new requests		Ope	
		Micro	
- 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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B
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STUDENT EMPLOYEE EVALUATION

Student's Name _____   Semester Hired _____

Rating Scale: Circle one from Excellent (5) to Unsatisfactory (1)

Attendance
    1. Reports to work daily or as scheduled   5 4 3 2 1
    2. Is punctual   5 4 3 2 1
    3. Notifies office when s/he plans to be out   5 4 3 2 1

Performance
    1. Work is accurate, thorough, acceptable   5 4 3 2 1
    2. Uses time wisely   5 4 3 2 1
    3. Shows initiative, reliability, and willingness to learn   5 4 3 2 1
    4. Prioritizes tasks   5 4 3 2 1
    5. Works effectively with minimal supervision   5 4 3 2 1

Communication with Others
    1. Is courteous, cheerful, and interested   5 4 3 2 1
    2. Takes instructions well   5 4 3 2 1
    3. Works well with fellow workers, supervisors, and others   5 4 3 2 1
    4. Serves the public in an active, responsive manner   5 4 3 2 1

Professionalism
    1. Acts in a professional manner   5 4 3 2 1
    2. Has the ability to make sound judgments and decisions   5 4 3 2 1

OVERALL PERFORMANCE RATING:
This employee's overall performance is judged to be (check one):

☐ Excellent   ☐ Very Good   ☐ Good   ☐ Satisfactory   ☐ Unsatisfactory

Supervisor's Comments: _____
_____
_____

Student's Comments: _____
_____
_____

This evaluation was discussed with me by my supervisor, and I have been given a copy.

_____   _____
Student's Signature   Date

_____   _____
Supervisor's Signature   Date

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Self-Evaluation

A F T E R

Self-Evaluation

Build Content | **Create Assessment** | **Add Interactive Tool** | **Assign Textbook**

ILL Student Worker Self-Evaluation

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!

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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!

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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.

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Not everything has to have an interactive component.

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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

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Questions?

kspring@linfield.edu