Online Catalogs:
What Users and Librarians Want

BCLA 2010 Conference

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OCLC™ The world's libraries.
Connected.

What access point is the most often used by your library users?
a) Your library's Web portal
b) Your library's main entrance?

Agenda

- How are these studies conducted?

  - Usability studies at OCLC

- Online Catalogs: What Users and Librarians Want

- Comments / Questions

Use, User, and Usability Studies

A BRIEF OVERVIEW

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User research methods we use

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- **Usability Testing**: 1:1 with a user completing a set of tasks

- **User Surveys**: links or popups from our site

- **Focus Groups**: discussion groups with customers or users

- **Contextual Interviews**: 1:1 observations and interviews of users in their own environment

- **Card Sorts**: 1:1 activity with a user to understand their mental model and information organization

- *Soon to come at OCLC...usability testing with eye tracking!*
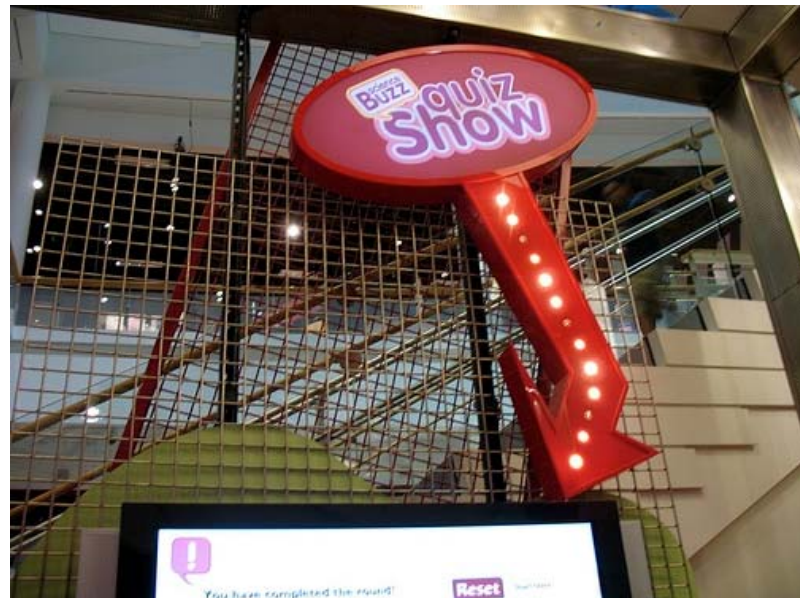
Online Catalogs:
What Users and Librarians Want

STUDY RESULTS

1. Our staff understand what our end users want from our catalog

- A – True

- B – False

- C – Don't know

By pirate johnny
http://www.flickr.com/photos/piratejohnny/2798872422/

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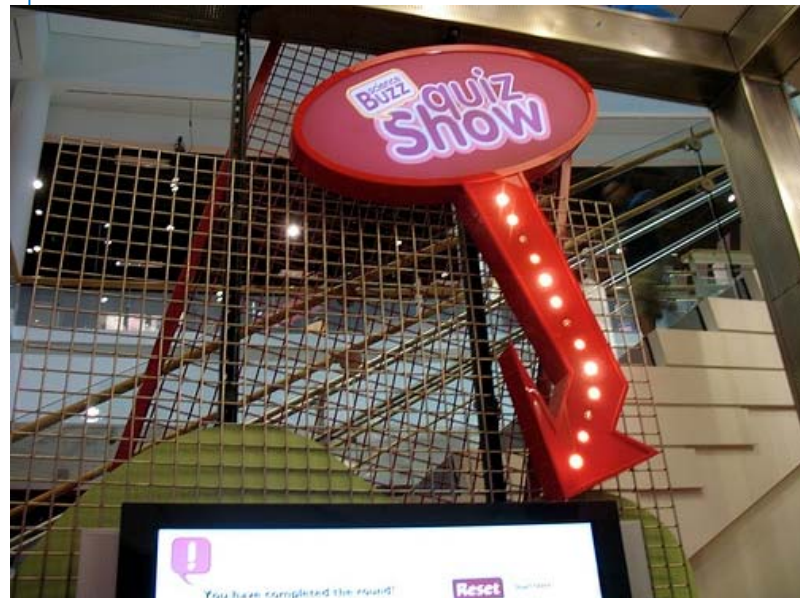## 1. Our staff understand what our end users want from our catalog

- A – True   **20%**

- B – False   **30%**

- C – Don't know   **30%**

By pirate johnny
http://www.flickr.com/photos/piratejohnny/2798872422/

2. My library's end users are satisfied with our online catalog

- A – True

- B – False

- C – Don't know

By: sea turtle
http://www.flickr.com/photos/sea-turtle/3181321172/

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2. My library's end users are satisfied with our online catalog

- A – True   **9%**

- B – False   **42%**

- C – Don't know **24%**

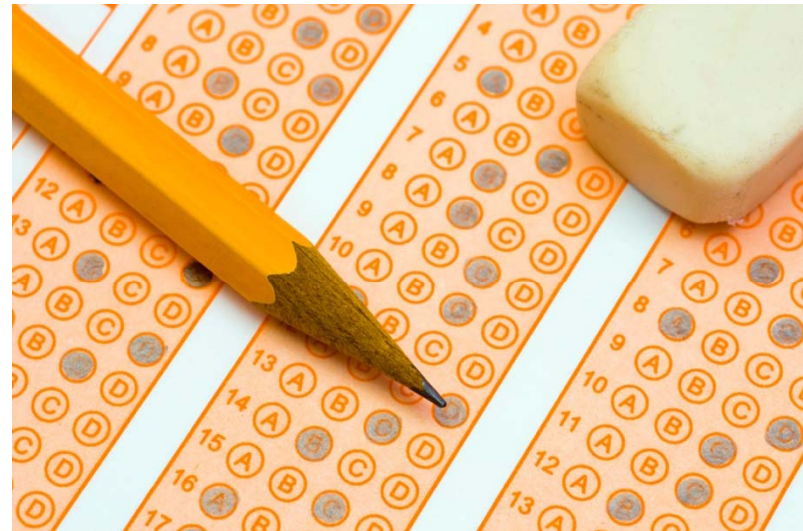By: sea turtle
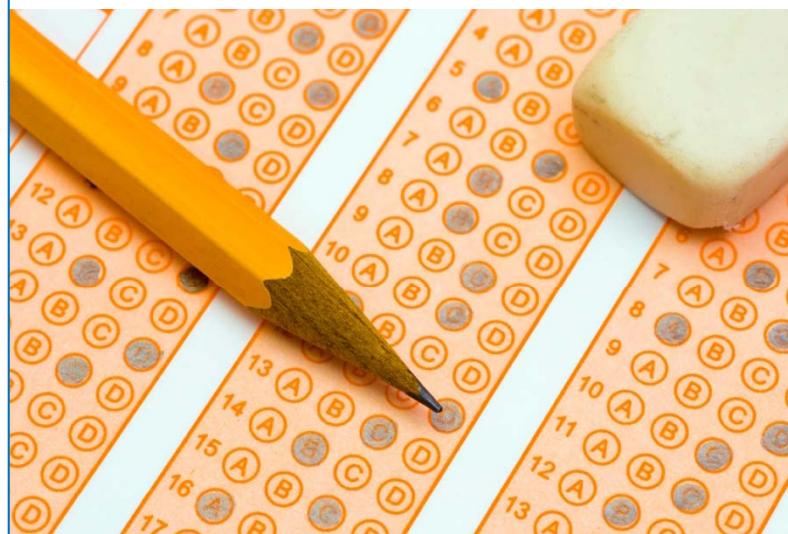http://www.flickr.com/photos/sea-turtle/3181321172/

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3. My library's cataloging practices and priorities reflect what end users want from our catalog

- A – True

- B – False

- C – Don't know

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3. My library's cataloging practices and priorities reflect what end users want from our catalog

- A – True   **24%**

- B – False   **15%**

- C – Don't know   **17%**

Objectives of our metadata quality research

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- Start over without assumptions about what "quality" is
- Identify and compare metadata expectations
  - End users
  - Librarians
- Compare expectations of types of librarians
- Define a new WorldCat quality program …
- Taking into account the perspectives of all constituencies of WorldCat
  - End users (and subgroups of end users)
  - Librarians (and subgroups of librarians)

Assumptions and mindsets: What is "full"?

Bibliographic
information

Australian
library holdings

Bibliographic
information

Library holdings
Details
Subjects
Editions
Reviews
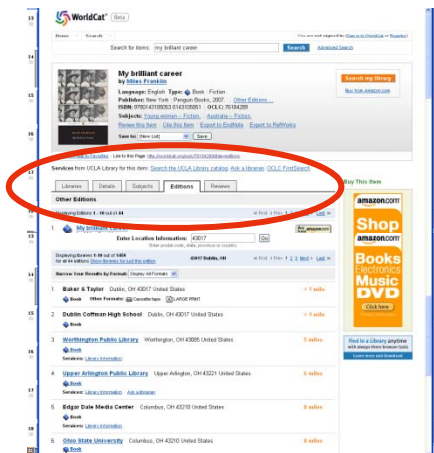
Product
description
and purchase
information;
'More like this'

Editorial
reviews and
author info

'Inside the
book' tags,
ratings,
customer
reviews,
lists and more

+ 3 more screens

With thanks to David Lankes:
http://quartz.syr.edu/rdlankes/Presentations/2007/ALCTS.pdf

The perception of "quality": The eye of the beholder

- Specialist's view:

  - Conformance to specifications (rules)

  - Priorities: Fullness and detail

- Pragmatist's view:

  - Make as many materials as possible available as quickly as possible

  - Priorities: speed and efficiency

- End-user's view:

  - Easy and convenient

Research methodologies and demographics

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- **Focus groups**

  - **Conducted by Blue Bear, LLC**

  - **Three sessions: College students, general public, scholars**

- **Pop-up survey on WorldCat.org**

  - **Conducted by ForeSee Results**

  - **11,000+ responses: Students (28%), educators (22%), business professionals (19%), other; mix of ages; 44% from outside U.S.**

- **Librarian survey**

  - **Conducted by Marketing Backup**

  - **1,397 responses; North America (64%) and outside North America (36%); academic, public, special libraries; staff with roles in technical and public services, ILL, directors**

Pop-up survey

- Live on WorldCat.org: May 12, 2008

- 11,000+ responses through July 10, 2008

- Evaluates the metadata most helpful in identifying
  a needed item

Who responded to the survey?

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- **Students:** **19%**
- **Teacher/professor:** **15%**
- **Other general searchers:** **34%**
- **Librarians/other library staff:** **32%**

End-user language:
- English: 84%
- Spanish: 8%
- Other: 3%
- French: 2%

- ## End-user country:

- **USA:** **56%**
- **Canada:** **4%**
- **Mexico:** **3%**
- **United Kingdom:** **3%**

End-user age:
- 18 & younger: 5%
- 19–30:   24%
- 31-40:   17%
- 41-50:   20%
- 51-60:   20%
- 61+:   13%

Librarian survey

Current areas of responsibility

- **Acquisitions:** **28%**
- **Cataloging :** **65%**
- **Collection development or selection:** **32%**
- **Interlibrary loan:** **25%**
- **Reference/public service:** **46%**
- **Library director/administration:** **20%**

What did we learn?
Pop-up survey suggestions
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Changes to help <u>identify</u> an item?

End users (n=7535)

Legend:
- ≡ Delivery-related enhancement
- ▮ Discovery-related enhancement

More links to online content/full text	36%
More subject information	32%
Add summaries/abstracts	18%
Add tables of contents	18%
More information in the "details" tab*	16%
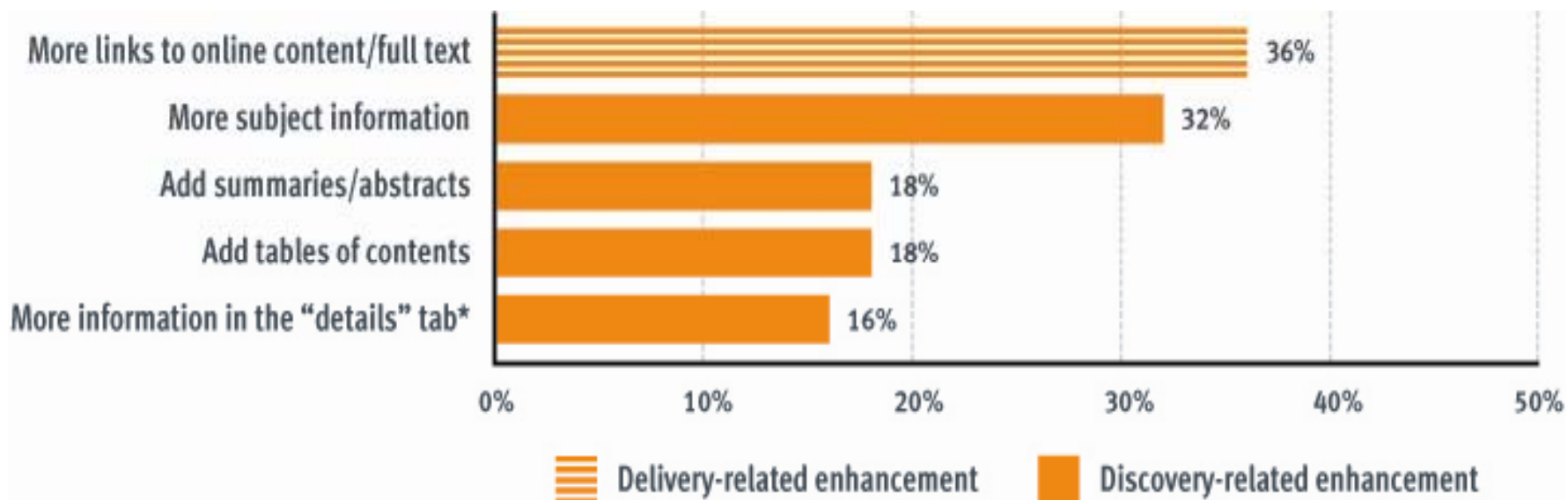
'Item details' in WorldCat.org

| Libraries | Details | Reviews | Tags | Related Items |

Buy This Item

The World Is Flat
Thomas L. Friedman...
Best Price $0.50
or Buy New
Buy from amazon.com
Privacy Information

The World Is Flat

About the Author(s)

Thomas L Friedman

Item Details

- **Material Type:** Internet resource
- **Document Type:** Book, Internet Resource
- **Notes:** Includes index.
- **Description:** viii, 488 p. ; 24 cm.
- **Contents:** pt. [1]: How the world became flat. While I was sleeping -- The ten forces that flattened the world: 11/9/89 (when the walls came down and the windows went up) ; 8/9/95 (when Netscape went public) ; Work flow software (let's do lunch: have your application talk to my application) ; Open-sourcing (self-organizing collaborative communities) ; Outsourcing (Y2K) ; Offshoring (when China joined the WTO) ; Supply-chaining (Wal-Mart) ; Insourcing (UPS) ; In-forming (Google, Yahoo!, MSN Web Search) ; The steroids (digital, mobile, personal, and virtual) -- The triple convergence -- The great sorting-out. -- pt. [2]: America and the flat world. America and free trade (is Ricardo still right?) -- The untouchables -- The quiet crisis -- This is not a test. -- pt. [3] Developing countries and the flat world. The virgin of Guadalupe. -- pt. [4] Companies and the flat world. How companies cope. -- pt. [5] Geopolitics and the flat world. The unflat world -- The Dell theory of conflict prevention. -- Conclusion. Imagination: 11/9 versus 9/11.
- **Responsibility:** Thomas L. Friedman.

Summary/Abstract

When scholars write the history of the world twenty years from now, what will they say was the most crucial development at the dawn of the 21st century--the attacks of 9/11, or the convergence of technology and events that allowed India, China, and so many other countries to become part of the global supply chain for services and manufacturing, creating an explosion of wealth in the middle classes of the world's two biggest nations, and giving them a huge new stake in the success of globalization? And with this "flattening" of the globe, has the world gotten too small and too fast for human beings and their political systems to adjust in a stable manner? Friedman explains how the flattening of the world happened; what it means to countries, companies, communities, and individuals; and how governments and societies can, and must, adapt.

Table of Contents

Chapter 1... While I was sleeping p3
Chapter 2... The ten forces that flattened the world p48
Flattener #1 - 11/9/89
Flattener #2 - 8/9/95
Flattener #3 - Work flow software

Find in a Library anytime with always-there browser tools
Learn more and download

Lots of detail

| Libraries | Details | Reviews | Tags | Related Items |

Buy This Item

NOT QUITE THE DIPLOMAT
CHRISTOPHER PATTEN...
Best Price $9.20
or Buy New
Buy amazon.com
Privacy Information

Not Quite the Diplomat

About the Author(s)

Chris Patten

Item Details

- **Material Type:** Biography
- **Document Type:** Book
- **Notes:** Includes index.
- **Description:** ix, 323 p., [16] p. of plates : ill. ; 25 cm.
- **Responsibility:** Chris Patten.

Find in a Library anytime

Not much detail

Top Five Data Quality Enhancements (librarians)

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Enhancement	Percentage
Merge duplicate records	52%
Add tables of contents to records	40%
Add summaries to records	28%
Fix typos	27%
Upgrade brief records	25%
Add cover art to results	25%
Make it easier to correct records	25%
Fix MARC coding errors	24%
Add summaries to results	24%
Increase accuracy of library holding information	24%
More records for online resources	22%
Add more formats	22%
More records for non-English materials	21%
More clickable links to online content	18%
Enable more libraries to make corrections	15%
Add excerpts to the records	11%
Add support for multilingual searching/record displays	10%
Greater exposure of holdings on the Web	8%

Top Five Data Quality Enhancements (end users)

Enhancement	Percentage
More links to online content/full text	36%
More subject information	32%
More tables of contents	18%
Add summaries/abstracts	18%
More information in the "details" tab*	16%
More author information	14%
Add sample text/excerpts	12%
Remove duplicate records	12%
More edition information	11%
More selection of non-English language items	10%
More cover art	10%
More reader reviews	9%
More citation information	9%
Add recommendations	7%
Add editorial reviews from popular publications	7%
More publisher information	7%
Increase accuracy (e.g., name, subject headings)	7%
More format/type information	6%
Add ratings	5%
Other	5%

Annotations: 14 (pointing to "More links to online content/full text"), 1 (pointing to "Remove duplicate records"), 4 (pointing to "Increase accuracy (e.g., name, subject headings)")
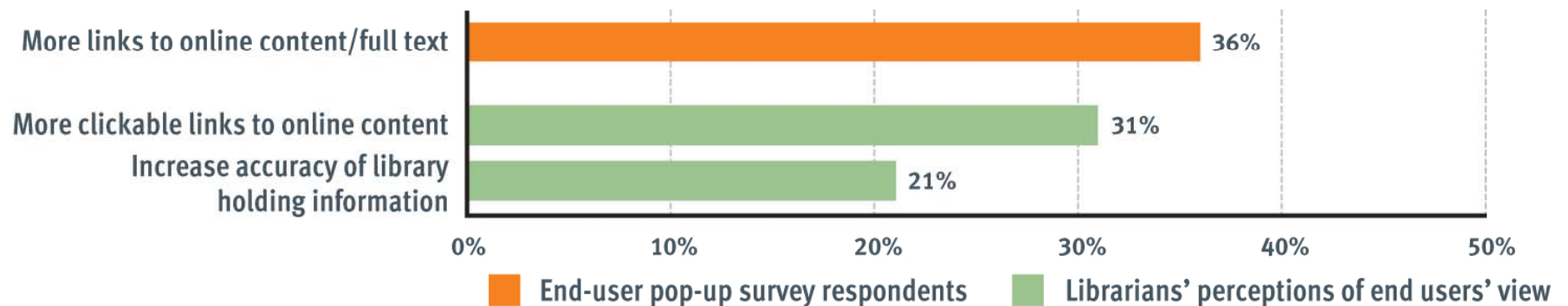
Librarians' Perceptions of What End-Users Want

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Recommended enhancements to WorldCat to improve delivery

More links to online content/full text — 36%

More clickable links to online content — 31%

Increase accuracy of library holding information — 21%

0% 10% 20% 30% 40% 50%

■ End-user pop-up survey respondents ■ Librarians' perceptions of end users' view

Top Five Data Quality Enhancements (librarians)

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Enable more libraries to make corrections	15%
Add excerpts to the records	11%
Add support for multilingual searching/record displays	10%
Greater exposure of holdings on the Web	8%

Upgrade brief records

Link to full text

- 14%
- 17%
- **LIBRARY DIRECTORS** 28%
- 21%
- 22%
- 23%

0%   5%   10%   15%   20%   25%   30%

■ Cataloging   ■ Acquisitions   ■ Director   ■ Reference
■ Collection Development   ■ Resource Sharing
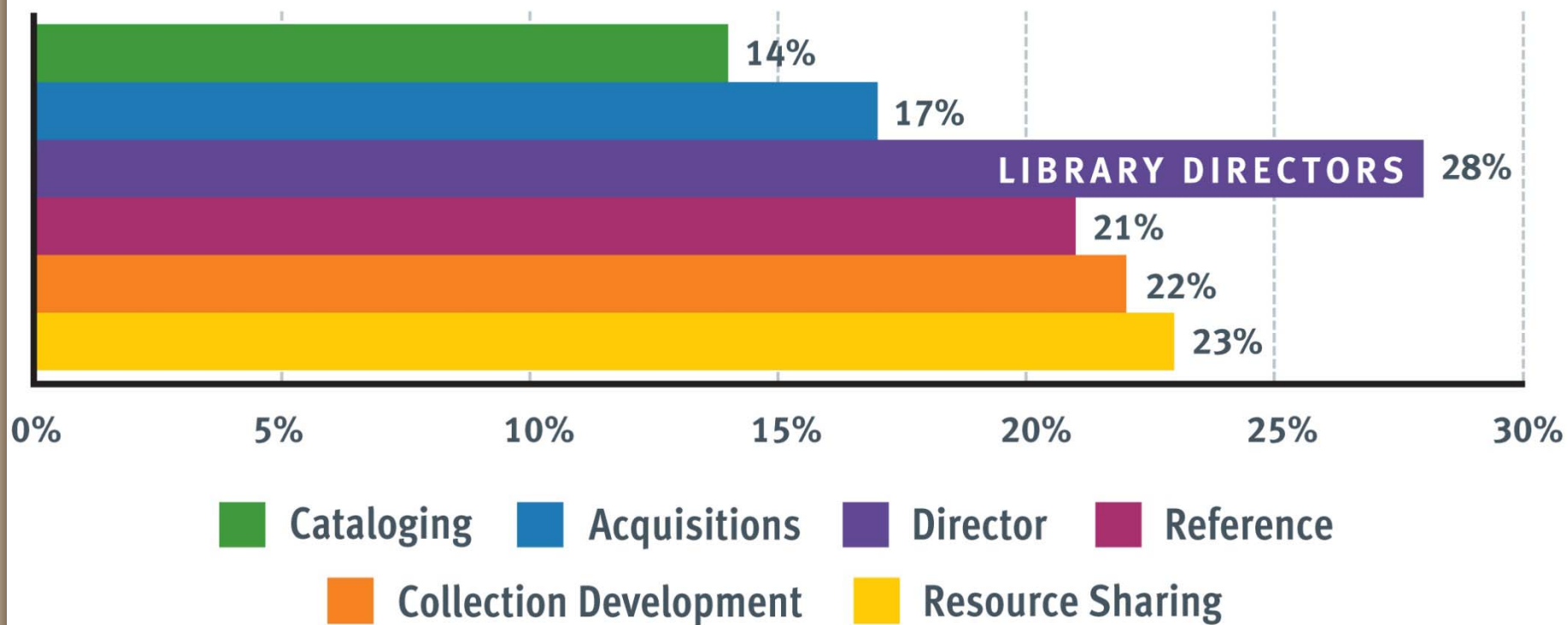
End-user recommendations

- Delivery is as important, if not more important, than discovery.

  - Seamless, easy flow from discovery through delivery is critical.

- Improve search relevance

- Add more links to online full text (and make linking easy)

- Add more summaries/abstracts: Make summaries more prominent

- Add more details in the search results (e.g., cover art and summaries)

End-user focus group results

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"**End users enter a few short search statements into online IR systems. Generally, their queries bear two to four words.**"—**Karen Markey**

- *Twenty-five years of end user searching, Part 1: Research findings.* 2007. http://deepblue.lib.umich.edu/handle/2027.42/56093

-

- **Other key findings of our study:**

- **Keyword searching is king, but ...**

  - Advanced search (fielded searching) is useful

  - Faceted browse is useful

  - These help end users refine searches, navigate, browse, and manage large result sets

Recommendations from librarian survey

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- Merge duplicates

- Make it easier to make corrections to records (fix typos; do upgrades); "social cataloging" experiment—Wikipedia

- More emphasis on accuracy/currency of library holdings

- Enrichment—TOCs, summaries, cover art—work with content suppliers, use APIs, etc.

- More communication about what users say they want

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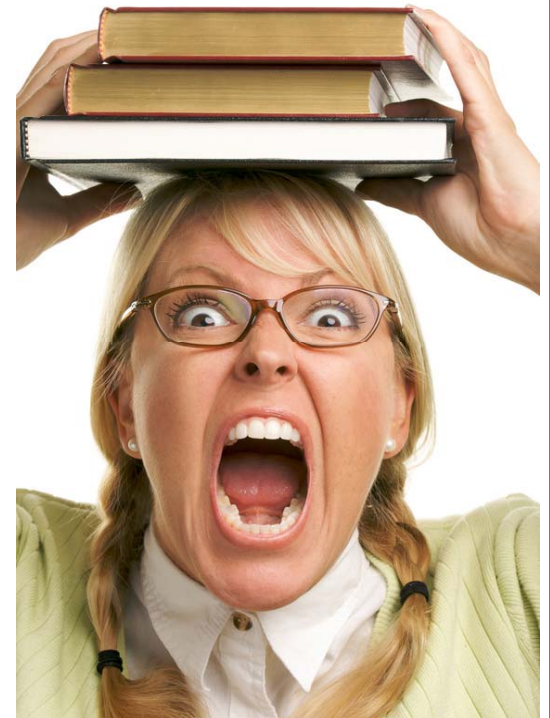
- **End-Users expect online catalogs:**

- to look like popular Web sites

- to have summaries, abstracts, tables of contents

- to help find needed information

- **Librarians expect online catalogs:**

- to serve end users' information needs

- to help staff carry out work responsibilities

- to have accurate, structured data

- to exhibit classical principles of organization

**Online Catalogs:
What Users and
Librarians Want**

An OCLC Report

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The Task Before Us

- "What is needed now is to integrate the best of both worlds in new, expanded definitions of what "quality" means in library online catalogs."—*Online Catalogs* report

- How can what technical services *does* better reflect what end users *want*?

Two Starting Points

1. **Paying attention to what's important about records**

2. **Aligning technical services priorities with end user priorities**

   - E-resources, books, media, unique digital collections

   - Redesigning workflows

"Evidence-Based Cataloging"

"[Catalogers] need to practice *evidence-based cataloging*. They need to catalog based on the evidence that they can find for the effectiveness of particular practices, and they need to judge their output according to this evidence."

Hilder, Philip and Tan, Kah-Ching. 2008. Constructing Record Quality Measures Based on Catalog Use. *Cataloging & Classification Quarterly* 46:4.

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Selection — Electronic, gifts, deselection → **Cataloging**

Cataloging → Physical processing ← Edit, update, correct database

Selection → Ordering

Selection → Vendor supplied approval plan

Ordering → Receiving

Vendor supplied approval plan → Receiving

Receiving → Cataloging — 20%

Receiving → Fast Cat — 80%

Fast Cat → Material is accessible to the USER

Material is accessible to the USER: Shelves, Electronic, Storage
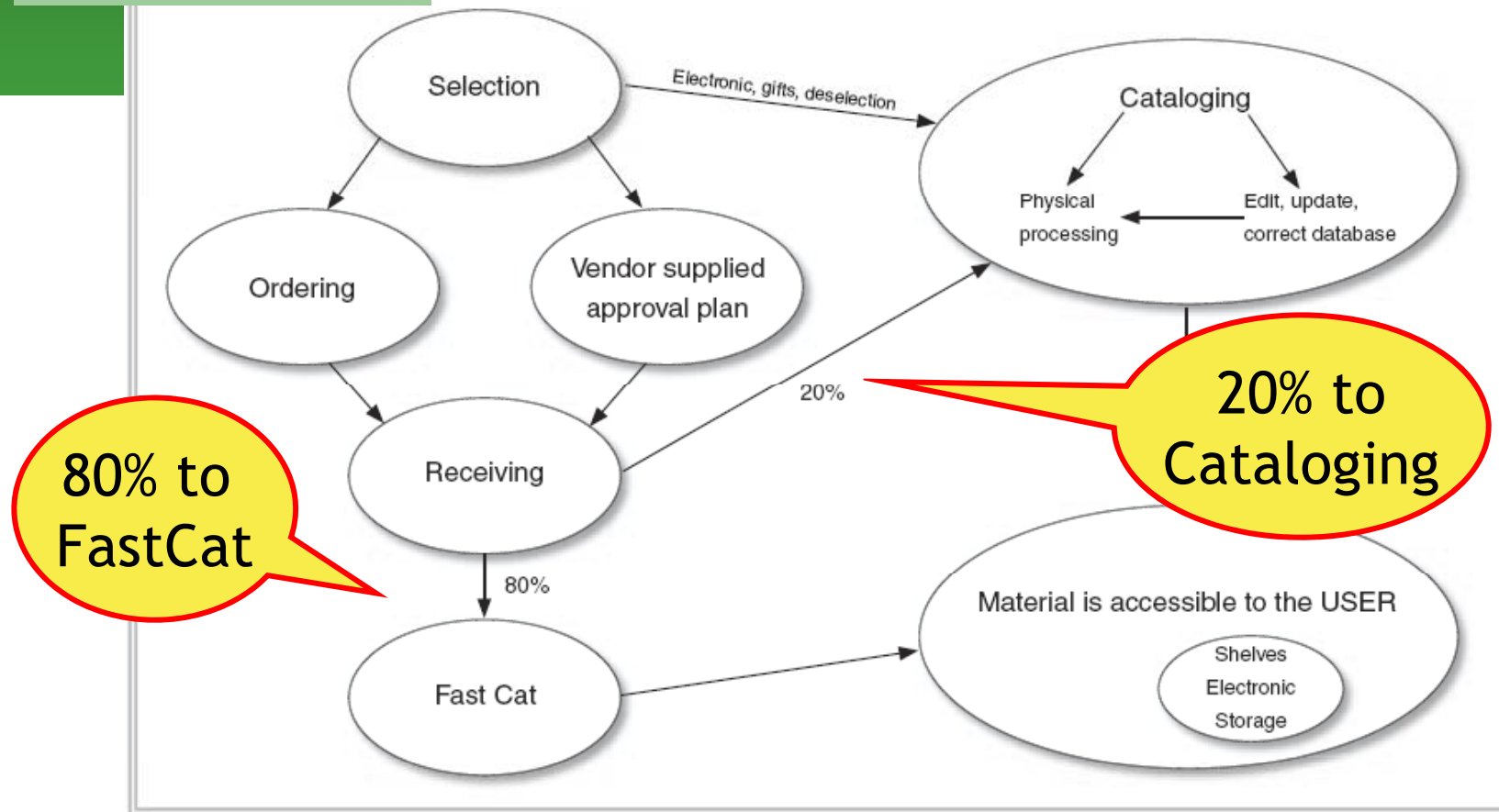
20% to Cataloging

80% to FastCat

Fig. 1. Work Process Model

From: Andreadis, Debra K., et al. 2007. Cooperative Workflow Redesign in Library Technical Services at Denison University and Kenyon College. In: *Library Workflow Redesign: Six Case Studies*, ed. Marilyn Mitchell. Washington DC: CLIR.
http://www.clir.org/pubs/reports/pub139/pub139.pdf

Examples of What Other Technical Services Leaders and Librarians Have Done (1)

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- **Adopt evidence-based cataloging**
  - Don't sweat the small stuff (and figure out what the "small stuff" is)
  - Let go of the perfect on behalf of the good
  - Accept that fast and convenient availability are *essential aspects* of quality

- **Redeploy, re-skill, and refocus human efforts on (1) organizing the materials your end user communities use or want the most AND (2) what cannot be automated**
  - E-resources
  - Media
  - Digital collections

Examples of What Other Technical Services Leaders and Librarians Have Done (2) – Workflow Redesign for Print

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FastCat

Process

- Study your processes with workflow maps starting with selection and ending with access (for e-) or on the shelf

- Outsource or automate the ordinary (e.g., obtain MARC record sets for e-journals)

- Maximize use of approval plans and/or vendor or OCLC record supply services (e.g., WorldCat Cataloging Partners)

- Receive as much as possible shelf-ready (and spot check *only*)

- Do as much processing (FastCat) as possible in acquisitions; save copy and original catalogers for the work *only they can do*

- Stop editing CIP copy; examine and adopt automated tools (e.g.,, OCLC Bibliographic Notification) to capture upgrades

- Stop special cuttering practices; close the shelflist card catalog

- Consolidate multiple tech services departments (where it makes sense to do so)

- Reduce the number of times materials are handled, moved, searched

- Seek out and eliminate as many workflow "exceptions" as possible

- Seek out and eliminate routines or subprocesses that take time but don't add value

- Get rid of multiple processes that accomplish the same thing

- What else?

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- **Commit to and invest in collective action with**

  --other libraries and consortia

  --other OCLC members

  --like organizations (local museums, archives, historical societies, cultural organizations)

  --vendors

  --other metadata communities

  --end users (your local communities)

Start Small, But <u>Start</u>

- **Realign our efforts to match:**

  - How collections are changing

  - How users are changing

  - How the Web is changing

- **We are staffed and trained for a print world— this MUST change, evolve and grow!**
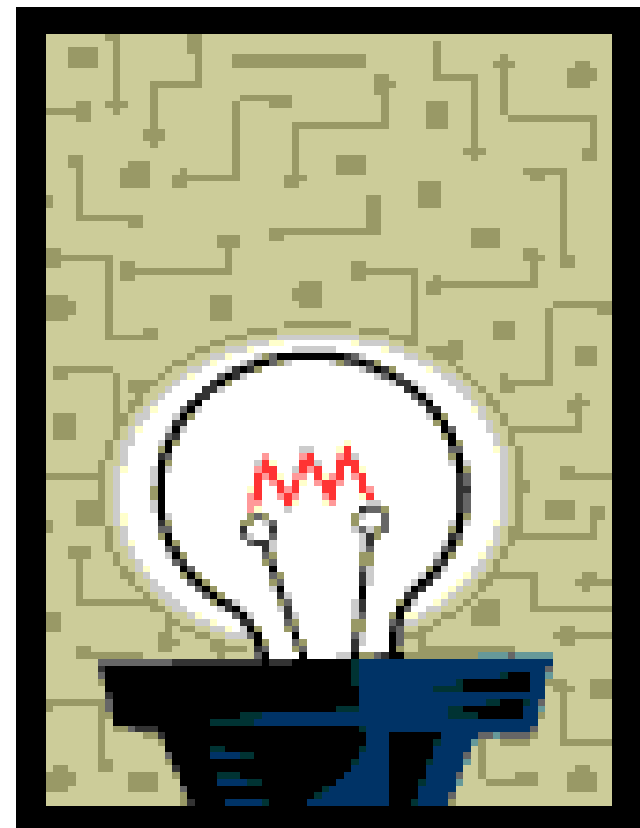
Credits

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Usability Information:

Christie Heitkamp OCLC Manager, User
Experience & Information Architecture Team,
WorldCat Local & WorldCat.org

> With thanks to Arnold Arcolio, Mike
> Prasse, Joanne Cantrell, and WC Local
> Pilot Users

Online Data Study:

Karen Calhoun Vice President, WorldCat and
Metadata Services

> With thanks to Janet Hawk, Joanne
> Cantrell, Peggy Gallagher - OCLC
> Market Research

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An OCLC Report

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http://www.oclc.org/us/en/reports/onlinecatalogs/default.htm

Comments / Questions?