What access point is the most often used by your library users?

a) Your library’s Web portal
b) Your library’s main entrance?
• 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
User research methods we use

• **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
Polling - What Do You Think?

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/
### Polling - What Do You Think?

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - True</td>
<td>20%</td>
</tr>
<tr>
<td>B - False</td>
<td>30%</td>
</tr>
<tr>
<td>C - Don’t know</td>
<td>30%</td>
</tr>
</tbody>
</table>

By pirate johnny
More Polling

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

- A - True
- B - False
- C - Don’t know
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

• 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”?

Product description and purchase information; ‘More like this’

Editorial reviews and author info

Bibliographic information

‘Inside the book’ tags, ratings, customer reviews, lists and more

Bibliographic information

Library holdings

Details

Subjects

Editions

Reviews

Australian library holdings

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

- **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?

- **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

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions</td>
<td>28%</td>
</tr>
<tr>
<td>Cataloging</td>
<td>65%</td>
</tr>
<tr>
<td>Collection development or selection</td>
<td>32%</td>
</tr>
<tr>
<td>Interlibrary loan</td>
<td>25%</td>
</tr>
<tr>
<td>Reference/public service</td>
<td>46%</td>
</tr>
<tr>
<td>Library director/administration</td>
<td>20%</td>
</tr>
</tbody>
</table>
What did we learn?

Pop-up survey suggestions

What is most essential to help **identify** an item?

End users (n=7535)

<table>
<thead>
<tr>
<th>Element</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A list of libraries that own the item</td>
<td>24%</td>
</tr>
<tr>
<td>The ability to see what is immediately available</td>
<td>14%</td>
</tr>
<tr>
<td>Author</td>
<td>12%</td>
</tr>
<tr>
<td>Item details</td>
<td>7%</td>
</tr>
<tr>
<td>Links to online content/full text</td>
<td>7%</td>
</tr>
</tbody>
</table>

Delivery-related element | Discovery-related element
What did we learn?
Pop-up survey suggestions

Changes to help identify an item?

End users (n=7535)

- 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%
What is the most important information that helps you find the item?
Top Five Data Quality Enhancements (librarians)

- 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)

1. Remove duplicate records
2. More links to online content/full text
3. More subject information
4. More tables of contents
5. Add summaries/abstracts
6. More information in the “details” tab*
7. More author information
8. Add sample text/excerpts
9. More edition information
10. More selection of non-English language items
11. More cover art
12. More reader reviews
13. More citation information
14. Add recommendations
15. Add editorial reviews from popular publications
16. More publisher information
17. Increase accuracy (e.g., name, subject headings)
18. More format/type information
19. Add ratings
20. Other
What did we learn?

Librarians’ Perceptions of What End-Users Want

Recommended enhancements to WorldCat to improve retrieval

- More subject information: 32%
- Add tables of contents: 18%
- Add summaries/abstracts: 18%
- More information in the “details” tab: 16%
- Add cover art to results: 48%
- Add tables of contents to records: 44%
- Add summaries to results: 43%
- Add summaries to records: 39%

[Graph showing percentages of end-user pop-up survey respondents and librarians’ perceptions of end users’ view]
What did we learn?
Librarians’ Perceptions of What End-Users Want

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Legend:
- End-user pop-up survey respondents
- Librarians’ perceptions of end users’ view
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- Greater exposure of holdings on the Web: 8%
Upgrade brief records

- Cataloging: 37%
- Acquisitions: 30%
- Director: 23%
- Reference: 19%
- Collection Development: 18%
- Resource Sharing: 16%

[Bar chart showing distribution of upgrade brief records by department]
What did we learn?

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)
What did we learn?

End-user focus group results

“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
What did we learn?

Recommendations from librarian survey

• 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
Online Catalogs: What Users and Librarians Want

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
“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
“[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.”

http://www.clir.org/pubs/reports/pub139/pub139.pdf
Examples of What Other Technical Services Leaders and Librarians Have Done (1)

- 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

- 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 cutting 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?
Examples of What Other Technical Services Leaders and Librarians Have Done (3) - Not Doing It Alone

• 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 Start

- 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

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

Comments / Questions?