Top Notch Support for eBooks

Vancouver Public Library

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Stay calm, be brave, wait for the signs
Objectives

Today you'll learn how to:

1. build an effective eBook support team
2. apply reference interview skills to technical support
3. create effective tools for delivering support
4. support library staff in delivering eBooks instruction and troubleshooting
Building an Effective eBook Support Team
Building a library eBook support team:

- Everyone who helps patrons at your library is part of the eBook support team.
- A tiered approach works best.
- Build a model that works for your library!
- Continual process that will evolve and develop.
Every eBook support question is one of two types:

1. instructional opportunity
   - patron is new to library eBooks,
   - or has a new device
   - or something with the process has changed

2. technical difficulty
   - patron has been successful in the past
   - error messages
Real life example:

“I prefer to search the library collection on my PC but read them on my PlayBook - this is very dangerous since one easily forgets that you have to check out the book on PlayBook - like I said above, I'm learning to never never check out a book on the PC - it will "disappear".”

What is your first reaction?
How do we know if a patron needs instruction or technical support?

1. Be familiar with the steps required to checkout, download and transfer an eBook.

2. Ask questions! This is where your reference interview skills come in!
Activity #1
(Discussion in small groups ~5-6 people)

Consider the eBook questions you frequently hear at the reference desk.

Which parts of the eBook support process can frontline staff do?
Be brave. What did your group discuss?
At Vancouver Public Library...

Tier one support:
- front line info staff
- determine the difference between instructional/technical issues
- answer instructional questions

Tier two support:
- specially trained eBook specialists
- deal with technical difficulties
Support Team

Challenges:

- eBook support takes a lot of time
- knowing when to refer
- developing technical competencies.
- distributing the work
- including all staff in support team
- eBook questions can have a lot of back-and-forth between staff and patron
Applying reference interview skills to technical support
Users often guess why a problem occurred

- don't assume the patron knows the solution or cause
- respect their effort at diagnosis
- apply questioning techniques to determine root of problem
- questioning provides a better, faster answer
Here's an example:

I have checked out A Feast for Crows: Song of Ice and Fire Series, Book 4, Adobe PDF eBook. I followed the instructions but when I downloaded the file and opened it with the overdrive program on my PC, the program said the file was corrupted.

What's your first reaction?
Stay calm, be brave, wait for the signs
The Reference Interview

What do you need to know before you begin?

- how to look it up!
- how to check patron's account
- a basic understanding of download processes
  - ie this differs by device
- a basic understanding of the 4 main formats
- general difference in device types (eReader vs tablet)

With these you can watch for, elicit & recognize “the signs”
What information do you need to help the patron?

- patron's library card number and PIN
  - always always always always check their account!
- the steps - what the patron did (or didn't do)
- what format, reader device, computer operating system, and software/app they use
The Reference Interview

You don't need to memorize! You just need to know where to look!

- learn with patron
- test it yourself!
- keep a searchable archive of answered questions (email folders, wiki, whatever works)
- google it - test to verify it
- consult with colleagues!
- contact the vendor, but think about solution first
The Reference Interview

**Activity #2**
(5 minute discussion in small groups ~5-6 people)

At your library, what's the most common method that patrons use to contact you for eBook help?

- email?
- phone?
- in person?

What are some challenges and advantages of each?
The Reference Interview

At Vancouver Public Library:

- email
  - little information given
  - more time to figure it out
- phone
  - pressure to answer immediately
  - harder to teach patron
  - It's ok to check and call back!
- in person
  - sometimes you can't help them IN the library
  - highest pressure to resolve immediately
  - you can SHOW them
The Reference Interview

**eBook support can resemble the 5 stages of grief**

- Matt Weaver of *Library Renewal*

- Denial
  - Hide!
- Anger
  - Curse you, Adobe Digital Editions!
- Bargaining
  - But we have that book in paperback!
- Depression
  - I tried so hard, but the patron left feeling frustrated; and thinking less of me and the library.
- Acceptance
  - I have to go through the process over the phone. I’m alone at the desk and it’s about to get busy. Whatever! I can do this!
Stay calm, be brave, wait for the signs
The Reference Interview

Reference Interview Steps:

- Be Approachable
- Show Interest
- *Manage Patron Expectations*
- Listen
- Ask Questions
- *Decide: Resolve or Refer?*
- Inform
- Follow up
Be Approachable

- Smile. Indicate availability by willingness to listen.
- Make online contact easy
- Set up voicemail message and "out of office" email autoreply
- Be confident! Know that you can help!
- Don't hide from the Playbook!

Stay calm!
The Reference Interview

**Show Interest**
- Maintain eye contact, nod
- Make attentive comments
- Give full attention
- Speaks in comfortable, relaxed tone
- Don't cringe when you see a Kobo Vox box!

**Be Brave!**
The Reference Interview

Manage Expectations

- Explain what you can do
- Learn together
- Call for backup if available
- Get patron started at comfortable location slightly away from info desk
- Let them know that set up may be needed at home

Continue to Be Brave!
The Reference Interview

Listen

- Give patron a chance to tell you what they want
- Don't interrupt
- Paraphrase to demonstrate understanding
- Ask clarifying questions
- Accept that patrons may express frustration

Wait for the signs!
The Reference Interview

**Interview**

- Discover what the patron has done
- Use open questions:
  - Open: “How did you do it?”
  - Closed: “Were you using the app?”
- Ask if they have been successful in the past
- Have they seen the help info? Watched screencasts?

Don't have enough signs? Elicit more!
The Reference Interview

Resolve or Refer

- Determine what kind of issue:
  - instructional - 1st tier/frontline staff can do it!
  - technical - (something is broken) - refer to 2nd tier

- Resolve immediately or suggest options:
  - formal classes
  - drop in labs or clinics
  - 1-1 sessions
The Reference Interview

Inform

- Find and show instructions
- Explain basic steps
- Suggest video screencasts as learning tool
- Take opportunity to model technology learning strategies
  - Show them - don't do it for them!
The Reference Interview

Follow-up

- Give the patron contact info
  - phone number or email address
  - second tier support (if appropriate)
- Ask the patron if they have everything they need
- Use appropriate follow-up questions or statement
- Invite the patron to return for more help
  - "Let us know if there's anything else"
  - "You know where we are"
By using the Reference Interview steps as a guideline:

- you can approach eBook related questions with more confidence and less dread!

- successfully and efficiently answer instructional and refer technical issues as appropriate
To review, think about

- What do you need to know to get started?
- What same steps should you always use to determine if a problem is a technical issue or an instructional opportunity?
Activity #3  
(Pair Discussion - 5 minutes)

Read these two questions and discuss **what steps you would take** to get the information needed to resolve these issues. Do NOT try to answer these questions, they are tricky!

**Question 1:**
I have been happily reading library books on my IPAD since May. My husband recently got a KOBO so I added his device to my account so we could share the books we bought and borrowed. This works well for purchased books but I can no longer download to my IPAD from the library. I can only download to my PC and then it does not show up on the ipad. Any idea what I am doing wrong?

**Question 2:**
I have downloaded Adobe Digital Editions to my Windows 7 PC. I have authorised my pc computer. However when I open my Samsung Galaxy tablet does not show on the left side so I am unable to transfer the downloaded e-book to my tablet ereader.
The Reference Interview

Be brave! What did your group discuss?
Activity #3
(Pair Discussion - 5 minutes)
What steps you would take to get the information needed to understand the issues

- read the question. Read it again.
- check the patron's card/account
- check to see if the title's format and method of download are compatible with the patron's device
- (Ask them to walk you through what they did)
How to create effective tools
Creating Effective Tools

To support staff and patrons:

- Create online and print guides
- Link to OverDrive help
- Use and create screenshots and screencasts
- Make use of knowledge bank
Creating Effective Tools

Create online guides

- Add extra link to OverDrive's instructional articles
- Create your own instructional guides
  - these get out of date FAST
- drive all eBook links through our online guide...
Creating Effective Tools
Creating Effective Tools

Downloadable eBook Collections

**VPL to Go**
A collection of popular eBooks and audiobooks for Vancouver residents. Vancouver residents can continue using the existing BC Libraries collection.

If you are not a resident of Vancouver but have a library card with another participating BC library, you can use the shared BC Libraries Library to Go collection, or contact your local library to inquire about supplementary eBook and audiobook collections available to you.

**BC Libraries: Library to Go**
A shared provincial eBook & audiobook collection which contains thousands of fiction & non-fiction titles for children, young adults & adults. It includes recent popular fiction, romance, mystery, biography, & self-improvement. Anyone with a valid library card at a participating BC Library can access this collection through their local library.

About VPL’s downloadable collections:
- Access eBook collections using a library card from your local library
- If a title is not available, you can place a hold
- Titles must first be downloaded to a computer or mobile device, using required free software or app
- Use the collection while you travel with an internet connection & your valid library card
- Titles are automatically returned after the lending period (1-3 weeks); there are no late fees.

For step-by-step instructions for accessing eBooks & audiobooks see our EBooks How To & Audiobooks How To tabs.

More eBook Sources

Technical & Reference eBooks
Creating Effective Tools
Creating Effective Tools

Here are some more examples from around BC:

- Burnaby - [http://www.bpl.bc.ca/library-to-go](http://www.bpl.bc.ca/library-to-go)
- Richmond - [http://www.yourlibrary.ca/content.cfm?sid=16&lev1=237](http://www.yourlibrary.ca/content.cfm?sid=16&lev1=237)
Creating Effective Tools

Create print guides

- Best to keep them general
  - get out of date fast!
- At VPL we have 2 training handouts:
  - 1 for ADE and ereader
  - 1 for OMC app
Creating Effective Tools

Use and create screenshots

- Visuals quicker and easier than written explanations
- It's hard to explain how to return an eBook
- Show it instead:
Creating Effective Tools

Use and create screenshots

- Use "Print Screen" Key - edit/crop in a basic microsoft program, ie Paint
- If you use Mozilla (Firefox), you can install a free add-on that will allow you to capture and annotate an image from any website:
  - Fireshot
  - Awesome Screenshot
- search google for ready made screenshots
Use and create screencast videos

- Install free options:
  - Jing, Screenr, etc
- Search youtube for ready made screencasts
- Use OverDrive's own videos!

http://help.overdrive.com/going-mobile-videos
Creating Effective Tools

Make use of knowledge bank

- Keep an archive of answered questions
  - email folders - search for previous answers
  - staff (or public) wiki
  - staff (or public) blog
Support library staff in delivering eBooks assistance
Supporting Staff

- **Training, training, training.**
  - For staff at all levels
  - Formal and informal training
  - eBook specialists are the best staff trainers

- **Encourage experimentation**
  - Create a petting zoo.
  - Suggested devices from OverDrive
  - Look at device specific videos online.
  - Patron devices
Supporting Staff

- **Make mistakes and learn from them**
  - At least you'll know what doesn't work

- **It is OK to say you don't know**
  - There will always be something new
  - Most patrons understand that change is constant

- **Document what you've learned.**
  - Wiki, email archives, blog, whatever works for your library.
  - Revise often.
Questions?
DEAR VARIOUS PARENTS, GRANDPARENTS, CO-WORKERS, 
AND OTHER "NOT COMPUTER PEOPLE."

WE DON'T MAGICALLY KNOW HOW TO DO EVERYTHING IN EVERY PROGRAM. WHEN WE HELP YOU, WE'RE USUALLY JUST DOING THIS:

START

FIND A MENU ITEM OR BUTTON WHICH LOOKS RELATED TO WHAT YOU WANT TO DO. I CAN'T FIND ONE PICK ONE AT RANDOM I'VE TRIED THEM ALL

OK

HAVE YOU BEEN TRYING THIS FOR OVER HALF AN HOUR? CLICK IT

NO YES

NO YES

ASK SOMEONE FOR HELP OR GIVE UP YOU'RE DONE!

DID IT WORK?

YOU'RE DONE!

.google the name of the program plus a few words related to what you want to do. Follow any instructions.

PLEASE PRINT THIS FLOWCHART OUT AND TAPE IT NEAR YOUR SCREEN. CONGRATULATIONS; YOU'RE NOW THE LOCAL COMPUTER EXPERT!

From xkcd: 
Tech Support 
Cheat Sheet: 
xkcd.com/627