Discovering the Library: Finding the Hidden Barriers to Success Using the Catalog
IATUL 2008—Auckland, New Zealand

Ellen Safley, Ph.D.
University of Texas at Dallas Libraries, USA
safley@utdallas.edu
Overview

- INTERFACES, impact of the Internet and the future of online catalogs
  - “The catalog is too complicated.”
  - “I find what I need using Google.”
- Fighting the “We Know Best” syndrome
  - Testing 3 sets of undergraduates--Focus Group
  - Verbal Protocol Analysis
- Will the next generation of catalogs make a difference? Faceted searching? Graphical interfaces? Federated searching?
Interfaces, impact of the Internet, and the future of online catalogs
The Internet Changes Everything

• Declining library services
  – Circulation, reference
• Students and faculty do not begin their research for information with a library (OCLC 2006)
• Students do not begin their research with the library webpage (OCLC 2005)
...when catalogs were cards

- Customers had to figure out
  - An alphabetical list (titles, authors, subjects)
  - Filing rules (I know I never achieved proficiency)
  - Tracings (to locate books on similar subjects)

- When periodical indexes were printed
  - Had to navigate subject headings and think about synonyms for the topic
  - Provided some understanding about how information is organized
…it was a simpler time…

• Sort of

• No keywords, no Boolean, no limits, no truncation….

• Since there were few substitutes, the audience relied on us and our catalogs and other tools
Automation

- Catalogs became online equivalents of the cards
  - Library of Congress headings
  - Authors
    - Last name first vs. main entries
    - Anthologies
  - Titles
    - Uniform titles, added titles
    - **Possible access to chapter authors**
Online Searching

- Librarians mediated the search, but at costs that were prohibitive.
- Students working with a librarian were shown how to create an effective search strategy.
- Once the indexes were available to the public—print would never substitute.
once the catalog was online

- We love our abbreviations, publishing history, enumerations, and Uniform entries.
- Size for describing ebooks.
- While never added EVERYTHING to the catalog—just to be confusing. Government documents, microfiche libraries, archives...
- Customers never understand--use an “index” or “database” to find articles---use a “catalog” to find books, journal titles, media, and archives.
Are we really surprised

• …when customers say that our catalogs are hard to use. Plus, they think they do not need help from a librarian.

• …if the number of requested materials through Interlibrary Loan is increasing even when we own the item.

• …if they spend **hours** with Google sometimes finding exactly what they need OR finding something that is good enough—especially when we paid for access?
Is there hope for the interface in the Next Generation Catalogs?

- Insight into what is being developed
  - Based on retail shopping websites
  - Use facets or segments

- Want to buy a shirt online
  - Mens/womens, price point, sleeve length, fabric choice, color/pattern, ....
Keep the Interface Simple

- Aquabrowser, Endeca, Primo, Encore
- One search box—aka Google
- Sometimes with a field designation
  - Keyword, author, title, etc.
- Use relevance to emphasize important parts of any bibliographic record (title, author, subject)
Welcome to AquaBrowser Library.

Search
- Enter your query in the text box above and press Enter (or click Search)
- In the central panel, you will get search results, ranked by relevance.
- Click on a result for a full view with holding information.

Discover
- A constellation of words on the left shows you related terms, spelling variations and translations.
- Click on words in the constellation to explore the contents of the catalogue.

Refine
- Refine shows you what your search results contain.
- Click on any term to focus and narrow your results.

powered by AquaBrowser Library®

Oklahoma State University
### Results

<table>
<thead>
<tr>
<th>Facets</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ways to further define the search</td>
<td>Call number</td>
</tr>
<tr>
<td>Easier?</td>
<td>Date</td>
</tr>
<tr>
<td>Could be presented as an image</td>
<td>Available/checked out</td>
</tr>
<tr>
<td>Some databases are using this approach--SCOPUS</td>
<td>Language</td>
</tr>
<tr>
<td></td>
<td>Location</td>
</tr>
<tr>
<td></td>
<td>Subject</td>
</tr>
</tbody>
</table>
new zealand wine
The Pricetag is Steep for the 21\textsuperscript{st} century interface

...What could we do to make the library catalog easier to use?
Catalog Committee

--Charged with overseeing the design and use of the catalog’s public interface
--Members include professionals from Systems as well as Technical and Public Services
University of Texas at Dallas

- Started as a research institution and became a part of The University of Texas System in 1969.
- Heavy concentration in electrical engineering, computer science, physical sciences, and management
- Doctoral/Research University—Intensive
  - 14,500 students, 30 doctoral programs
- 79% materials budget is non-print
- Voyager, SFX, Verde, chat, meebo, ILLiad, Docutek
- 1.4 million titles, 38,000 journals, 500,000 ebooks
- Extensive instruction program
Problems with the Catalog

LibQual testing revealed catalog and webpages were “hard to use”

Interlibrary Loan statistics--increasing numbers of requests returned because the Library owned the item

Reviewed statistics on catalog usage—
- Problems with searching for titles and subjects
- Use of punctuation within searches
- Use of jargon--field labels, holdings statements, etc.
An Opportunity—
A System Upgrade

• Improve the catalog—refocus on the customer
• Look at the search interface, all messages, field tags, all displays, default settings, and help screens
• Look at everything the customer sees
• Committee members worked through process and made substantial changes
Literature on OPAC testing

- Chisman article used repeated for Library webpage testing
…then, we asked some undergraduates

- A subcommittee was appointed to do focus testing
- Used verbal protocol analysis which enabled the librarians to observe students in the process of searching for known items
- Required a BIG time and staff commitment
Strategy

- Literature indicated that 8-10 students was enough to see the variety of problems
- Pre-tested students for familiarity with the catalog. Final participants were split equally between frequent/infrequent catalog users.
- Cross-section by School/degree (Arts and Humanities vs. Electrical Engineering)
- Catalog Committee members would observe
How It Worked

- One person read the question
- One person watched them use the computer
- One person recorded
- Each session took an hour

- Others observed the process from the back of the room
What did we “discover”?
problems

- Used the initial article when searching for titles
- Cannot read holdings statements
- Do not use advanced searching options
- System is not forgiving with punctuation
We Made Some Changes

- Changed some wording of phrases, buttons, help screens, field tags, etc.
- Some problems could not be changed—hard coded in the software
- Could not agree on how to change it
- Focus groups were run again—different undergraduates, same questions
After Round Two...

- The results improved 11% overall. Most of the changes were positive.
  - Did not understand **RECALL, ON HOLD, SERIES, RETURNED**
    - Thought the book was “recalled” by the publisher
    - Thought “Returned” was also to the publisher when it means that the book was discharged. The Returned message is temporary for 2 days to alert the staff that it could be in a reshelve area.
    - “On Hold” –thought it was not published yet.
Buttons Changed

- Title → Title List
- Patron → My Account
- Checked out (due---)
  Checked out (due__) Want it? Use REQUEST button
- Staff View → Totally removed
  - Thought it would be a picture of the staff 😞
- In Process → Just Arrived. Want it?—Ask at the Reference Desk
- History Button—Eliminated (no use)
Holdings

- They mostly cannot read them
- MARC format
  - Vol. 2- (1989-) Think we only have vol. 2
  - Asked repeatedly do we have vol. 5
  - Say no

- Only 14% understood them (in either session)
- Use the A-Z list for electronic journals
- Ignore print journals altogether
Initial articles (a, an, the…)

- Voyager catalog is unforgiving
  - Could not enter the first article
  - Librarians do not want to highlight TITLE KEYWORD because it is imprecise
  - Only 50% could find the title beginning with THE
Advanced Searching

• Students rarely used multiple search boxes
• Some tried to use truncation and quotation marks, but the catalog system is not adaptable.
• Did not use limits and did not understand questions about qualifying by language, date, or format.
• Two forms of the bib record (Brief or Long)—more confusion.
Enlightenment

• One unexpected outcome was with the librarians observing the testing:
  – Those who thought they knew how the catalog should work
  – Those who insisted that the students had to learn the jargon, etc.
  – Those who were creating the catalog
• Realization that the interface was NOT helpful
  – You cannot buy this type of development!
Testing, Round 3
Spring 2008

• Just finished

• One major change in the catalog was a universal search box (Keyword Anywhere)
  – HOPED that students would search titles in the box and avoid the pitfall of the initial article
Results

• Results for title searches did not change with the box

• Library tried to make searching more like databases by changing truncation symbols to a * rather than a ?
  – Did not matter, did not use them
Messages in Catalog

- Tried to change the point when students were failing
  - Messages about location (tried maps)
  - Messages about recalling a book (working)
  - Messages about in process (working well)
  - More **HELP**—told that the messages were too wordy. Students never looked at them to try to work through the search.
Can you check out an item---Used phrase if it could be checked out

New Zealand, a handbook of historical statistics / G.T. Bloomfield.

Author: Bloomfield, G. T. (Gerald Taylor)
Title: New Zealand, a handbook of historical statistics / G.T. Bloomfield.
Physical Description: xviii, 429 p. : ill. ; 29 cm.
Location: Reference--2nd Floor--IN LIBRARY USE ONLY
Call Number: HA3184 .B55 1984
Status: Available
Additional Information: 

More about this item >>
Removed the Quick Limit to Simplify the Page
Resulted in customers being UNABLE to find a video recordings by subject
What They Understand

- Understand the words e-book, e-journal
- Understand full text
- Understand renewed, checked out
- Prefer journal to periodical
- Prefer e-book to electronic book
- Prefer Find this to Search this
- Adding a copy statement—assume that there are more than one copy
...so if they do not read and they click first....

• Problems with students requesting items we already have through Interlibrary Loan
  – Using the wrong index in catalog (use title when need author)
  – Searching the catalog for periodical articles, not books
  – On Google/Yahoo, it works without it—at least they think so...
…so if they do not evaluate

- Finding materials that are dated, biased, or inaccurate
- And the faculty are complaining about the quality of their research
- Faculty assume that the students know how to use the Internet, but are amazed when they do not know how information is organized
Provide the systems that people expect

• Can we fix the issues without investing in next generation catalogs?
  – Need ONE SEARCH BOX ✔
  – Need jargon free catalogs ✔
  – Need easier ways to limit a search ✗
  – Need it to be an experience ✗
    • Book covers—visual pleasing

• Our catalog is easier, but not easy
What Now?

- Exploring options for new OPAC front ends
  - Aquabrowser, Endeca, Primo, etc.
- Exploring federated searching models
  - WebFeat
  - Had and cancelled Encompass by Voyager
- Keeping an eye on Local WorldCat (OCLC)
  - No one is complaining about the quality of bibliographic records
If you build a resource

• ...assuming the customers can use it effectively
• ...assuming they will know the authority behind it
• ...assuming they will understand the accuracy and quality of the content

• Many are looking at the first 10 things that come up on a browser. Quick and dirty. 😞
My customers want to put in a couple of words in a search box
(and they MIGHT be misspelled)
CLICK
And get the content
They want a smart interface and do not want to have to learn the special nature of your resource!
Focus on the User
Questions?

Ellen Safley
safley@utdallas.edu