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Biz of Acq -- Screencasting for Acquisitions

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More and more, library acquisitions work has depended on complicated software systems like the **ILS**. Therefore there is a growing need for training resources that can quickly instruct staff members how to perform vital software processes. Many people learn best by in-person training sessions where someone can demonstrate each step and show how each transition will look. However, these training sessions can require a significant time commitment for managers or trainers. How can we satisfy this training need without dependence on one-on-one time?

One tool that can help is the screencast. Screencasts are videos of computer screen output, sometimes with narration. Imagine a video of everything showing on your computer screen, including the cursor, the mouse, and each screen you open and close. A screencast might show you creating a purchase order in your **ILS** or using a vendor database to claim a serial. Your voice can be recorded over the visuals explaining each step, or you can add on-screen captions and highlighting after recording the video. In this way, you can combine video, audio, and text to capture all types of learners. Because the screencast will be viewed on a user's computer, the viewer is able to display the video side-by-side with the software it depicts and even follow along.

Screencasting has been used in libraries for several years now, particularly in public services. Librarians have used screencasts to show patrons how to search a database or how to use the library catalog. This tool can be used just as effectively for training library staff for internal library work.

How To Use It

Which procedures are best suited for a screencast? First, it should be a simple and short process. Viewers will understand the process best in short chunks and, if needed, you can create several videos for each portion of a longer process. Second, it should be a procedure that is done the same way every time. A video will not capture multiple possible paths as well as a flowchart or text instructions. Button and click-intensive procedures are ideal for screencasts, rather than procedures that involve entering text. Text can be copied and pasted from a written procedure but it will be hard to remember from a screencast. Procedures that involve choosing an option on a menu are perfect for screencasts, because menus are difficult to show in still screen captures.

A screencast can be useful not just to teach a new process but to explain how to do an established process on a new software platform. With that in mind, here are a few examples of ways to use this technology for acquisitions work. Setting preferences for an online product is a great use of a screencast. This process might involve navigating to a preference menu, choosing options, and saving changes. The location of each button the user needs to click and the correct choice on the menu they must open can be shown clearly in video form. I have used a screencast to teach acquisitions staff how to set the **ILS** preferences for advanced searching options.

Another way I've used screencasts is for outreach from the acquisitions department to bibliographers. Often it falls on acquisitions to train bibliographers in procedures such as the use of a vendor database for slip selection. While you may provide group or one-on-one trainings, some users may not remember how to do processes later when they are alone at their desk. In bigger institutions where it isn't so easy to find someone to ask, acquisitions can provide documentation to help bibliographers or other library staff remember how to perform processes. Examples of screencasts might be how to save a list of vendor online slips for later action or how to designate an order for rush processing in a vendor database.

A final idea is using screencasts to capture software bugs and problems. When providing feedback to an **ILS** vendor, for example, it can be hard to express a bug or error through text or still screen captures. By using a screencast, you can capture the moment where you get an error message or when a cursor is not positioned correctly.

Tools

I have used **Camtasia** and **Adobe Captivate**. Both are packages of screencasting software along with video editing software so you can create a screencast and then edit the video and audio to perfection. **Camtasia** is cheaper (around $300) and has worked well for me. There are also programs like **Camstudio** and **Wink** that do not have the same video/audio editing options but are freely available online. You will also need a microphone if you plan to add narration.

Where to Put It

Now that you have your screencast, where do you put it? The first thing to be aware of is that these are usually very large files. You will need to compress the file if you want to post it to a Webpage. Most screencasting software will help you with the compression steps. Screencasts saved in flash format (.swf) will be the smallest size and be the most flexible in where they can be displayed. I created my screencasts as **Windows Media Video** (.wmv) files and mounted them into our internal wiki, but immediately ran into problems because my default **Firefox** properties would not allow .wmv files to open correctly with **Windows Media Player**. When making a decision about the format of your screencast file, make sure to check the video in multiple browsers and multiple versions to make sure it will open correctly from your hosting platform.

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Another option is mounting the video on the Web and providing a link to users. Videos can be mounted on **YouTube** and similar free sites, or you can pay for space on a hosting site like *Screencast.com*. A commercial site will give you options such as setting access controls and downloading usage statistics.

Staff Reactions

So how do they like it? I started with a few brief screencasts on our staff wiki, to see if my staff would find them helpful. Their comments were overwhelmingly positive. One person wrote, "I would print the written instructions and do the steps. If I can't locate the buttons/tabs, the video is a big help." Another commented that "following a long list of written instructions for a procedure can be quite tedious; the visual aspect of the movie adds a lot of clarity. Also, the fact that it can be re-played whenever necessary is an advantage — to make sure things are done right." The comments of a third staff person helped me think about what could be improved; "The video is nice, but I had a hard time seeing the small print (can you make the print larger for my tired old eyes !!). Also, can you slow down the arrow — moves a little too fast for me to follow." The last comment underlines the need for a variety of resources for staff. A screencast might not be the best tool for someone who needs a large-print view. For those staff members, text directions that can be enlarged in their browser may be more successful or in-person training to repeat each step as needed.

It may take some time to perfect your screencasting technique but the results will be a valuable addition to your staff training resources, as well as offering time savings by reducing the need for one-on-one training time. 🐢