

SWAN Advisory: Discovery and User Experience (DUX)
Thursday, September 26, 2019

Notes

1:30 PM – 3:30 PM

Oak Brook Public Library

Note: Agenda notes slight reordering of topics:

1. Welcome and introductions (5 min)
2. Demo and discussion: SimplyE
3. Recap of eContent Design Activities [Added]
4. Fall 2019 usability research activity planning
5. Demo and discussion: Enterprise 5.0.1 preview
6. Discussion on Enterprise search results page (on shelf, all copies in use at my library, etc) [Added]
7. Discussion: Designing a staff holds function in Enterprise [Deferred]
8. **Next meeting – October 24th**

1. Robin introduced an activity “The Starburst Challenge.” Each member was asked to guess how many starbursts were in the bag. At the end of the meeting, Robin shared the results which showed that reinforcement learning can be based on predictions where crowdsourcing is a way to add to emerging intelligence. The group average guess was 82. Of the 16 participants, only 3 individuals were closer than the combined groups average.

2. Robin demonstrated use of SimplyE. SimplyE is an app developed by The New York Public Library to help provide a common reading app and patron experience regardless of e-book vendor. Removes the barriers we are encountering and trying to address with Enterprise and ebooks now. Patrons will no longer need to have separate accounts to access these resources.

Green Hills is part of a pilot project. The pilot will be expanded to include St. Charles and Eisenhower.

The app provides some of the following features:

- Patrons do not need to create vendor accounts. Does not require OverDrive or Axis 360 login/account, the app works directly with web services to communicate between vendor and catalog authentication.
- Can change some expirations dates in the SimplyE server settings to be less than the vendor time periods. Cannot extend within the server settings to be more than the vendor time period.
- Max checkouts in SimplyE cannot be larger than the OverDrive collection limits.
- Reservations is used as terminology for books on hold. Within the app you are notified that the book is available.

- You could add multiple library cards.
- Vendor is displayed in item details as “Contributed by”
- Duplicate titles in different collections will appear as separate titles. This is because all data is pulled through api and returned as xml.
- Supports ePub only format.

Collections supported:

- OverDrive ebooks (audiobooks not currently supported)
 - includes Advantage and shared collections, e.g. MediaOnDemand, eMediaLibrary
- Cloud Library
- RBDigital
- BiblioBoard
- Axis 360 (including audio)
- Recorded Books (not kindle format, audio being developed by NYPL now)

Questions for follow-up:

- What plans are there to add other vendors? Which ones?
- Is Hoopla under development?
- What about Magazines? Zinio?
- Does the app work with a screen reader?
- Can you download on SimplyE and still open in Libby?

2. Tara reviewed the eContent Design Activities Summary. This summary covered activities conducted over the summer, targeting eContent discovery and access.

Not yet figured out how to guide users to the most appropriate format. Lauren is working on our patron-facing website with hopes of providing additional help in using these e-resources/apps.

Some of the take-aways which SWAN will be working on include:

- Exploring redirects based on detecting device used.
- FRBRized records is under investigation.
- Instead of giving people a download button, provide a button/link to sign up for an account.
- Consider relabeling buttons and format label.
 - Instead of “download” what would be a better label since the download is actually a couple steps away, maybe “checkout”
 - Short-term – perhaps we can relabel some of the OverDrive format labels?
- Exploring how we can use our Digital Shelf better?

We’ve done a good job of capturing the problems and have some potential solutions for some.

3. Tara shared that these activities have led into our Fall 2019 Usability Research Activity. Our next step is to talk to patrons. Susan volunteered GED and we will do some patron interviews. We want to test patrons who have used ebook or eaudio formats. This will be a more generalized usability interview. We plan to interview 5-6 patrons familiar with one or the other, or both. Patrons will be asked to bring their own device so that we can gain insight into their preferences, use of tools and help build awareness of the problems we are trying to solve.

Some questions we seek to answer:

- How do people use it now?
- Are people using the catalog?
- Or should we just be directing them to the vendor?
- Vendors, platforms, and methods to get there (through app and through Enterprise). If you do have an account do you understand the language presented or simply go with what worked in the past?

Glen Ellyn has almost every vendor, so they are a good library to target for this study. Robin went through all vendors and created accounts on every platform and documented all steps required for each.

Another activity we are considering is looking at the BLUEcloud Mobile app. This usability activity would be more targeted for short interactions. For example, we could set up in lobby, have a sign up, and do a quick usability/demo of how they use it. More people with quicker interactions would be beneficial for this mobile app study. DUX members would moderate these interactions/demos with their patrons.

DGS may be willing (December); OLS is targeting drop-in and download sessions for the app in December, so we could build this into those session. Oak Lawn will be promoting these sessions in their newsletter.

5. 5.0.1. preview – upgrade did not “happen” instead it was an evaluation. We are now in another line for the upgrade. Tara demonstrated that this upgrade is not true responsive, but rather relies on the device recognition to display the mobile version. Tablet will likely display the desktop version.

Release notes are available on the SirsiDynix Support Site - <https://support.sirsiidynix.com/kb/164764>

You can see a demo version of Enterprise/Portfolio 5.0.1 at https://sde50test.psst-sales.sirsiidynix.com/client/en_US/bluecloud. [Note: may not be available as this is a test/demo URL and not production.]

6. Tara shared preview of catalog changes to show instructional message to place a hold. All copies in use vs in my library place.

Detail display and search results will show the same information.

These changes will be coordinated with the upgrade to 5.0.1.

Discussion included the following topics which will be incorporated into 10 Second Surveys to gather more feedback:

- Should Due Dates be displayed in Enterprise?
DUX debated the pros/cons of displaying Due Dates. Patrons want them and removing them will cause patron displeasure when released. On the other hand, patron behavior is impacted by display of Due Date and not to their advantage. Instead of assuming an item will be returned at a specific time, we want to encourage patrons to place holds to ensure they get a copy as quickly as possible. Due Date can also be deceptive as it cannot anticipate automatic renewals.
 - Consider a pilot to determine patron feedback
- Proposed search results showing available items only on search results page.
 - Change icons to 3 distinct, but subtle variations
 - Check-green [On Shelf]
 - Exclamation-yellow [All Copies in Use]
Change message to:
“Have a card at LIBRARY NAME? You get preference on the hold list for this item.”
 - Minus-yellow [No Copies at LIBRARY NAME]
Message: “You may be able to get this from another library.”
 - Recommendation to change the detail display header to “Copies on Shelf (All Libraries):”

Other areas where language is unclear is On Order vs Being Acquired by the library. What is difference between these statuses and is there any room for a more uniform display for patrons. This relates to the different procedures libraries follow when placing orders. (e.g. Atwood – Testaments)

Attendees:

1. Jane Arndt (Saint Charles)
2. Nicolas Ayala (Itasca)
3. Madeleine Belk (Tinley Park)
4. Molly Bitters (Eisenhower)
5. Susan DeRonne (Glen Ellyn)
6. Graham Dostal (Tinley Park)
7. Doug Ferrini (Tinley Park)
8. Amanda Ghobrial (West Chicago)
9. Greg Hunt (Frankfort)
10. Jean Jansen (Villa Park)
11. Michelle Kurczak (Messenger)
12. Tony Lucarelli (Indian Prairie)
13. Joy Matteson (Downers Grove)
14. Kelly Mueller (Itasca)
15. Ang Romano (Oak Lawn)
16. Sarah Slack (Saint Charles)

17. Mary Williamson (Oak Brook)
18. Nancy Wollwert (Messenger)
19. Scott Brandwein (SWAN)
20. Robin Hofstetter (SWAN)
21. Lauren Levaggi (SWAN)
22. Michael Szarmach (SWAN)
23. Dawne Tortorella (SWAN)
24. Tara Wood (SWAN)