SWAN Clarity Task Force

Agenda

Wednesday, July 10, 2019, 10:00 a.m. – 12:30 p.m.
SWAN Headquarters
800 Quail Ridge Dr
Westmont, IL 60559

1. Introductions & Welcome
2. Review Notes from June 5, 2019 Meeting
3. Plan for Gathering Insight (see Clarity Task Force – Gathering Insight document)
    a. Screen Capture demo
    b. Review journaling for Diary Studies
    c. Ideas on gathering Cataloging/Tech Services/Acquisitions staff input
4. Mock Focus Group
5. Report on Cataloging Standards (Kerry)
    a. Online Forums and Cataloging group (Scott)
6. SWANx19
    a. What is BLUEcloud? Presentation
    b. Role for Clarity Task Force members to seek input/network
7. Next meeting: Wednesday, August 14 (10-12:30) - https://www.librarylearning.info/events/?eventID=28764

Task Force Membership:

- Kerry Halter, Technical Services Manager, Batavia Public Library District khalter@batvaiapubliclibrary.org
- Kristina Howard, Adult Reference Manager, Tinley Park Public Library khoward@tplibrary.org
- Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
- Cindy Maiello Luecklich, Director, Melrose Park Public Library maielloc@mpplibrary.org
- Amy Prechel, Head of Access Services, Downers Grove Public Library aprechel@dglibrary.org
- Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library aromano@olpl.org
- Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library asievers@elmwoodparklibrary.org
- Colleen White, Cataloging Librarian, Oak Park Public Library cwhite@oppl.org

SWAN Staff:

- Dawne Tortorella, Assistant Director, Chair

- Aaron Skog, Executive Director
- Scott Brandwein, Bibliographic Services Manager
- Steven Schlewitt, Information Technology and Support Services Manager
- Tara Wood, User Experience Manager

SWAN Clarity Task Force

Notes

Wednesday, June 5, 2019, 10:00 a.m. – 12:30 p.m.

Introductions & Welcome

Task Force Membership:

1. Kerry Halter, Technical Services Manager, Batavia Public Library District, khalter@batvaiapubliclibrary.org
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Review Notes from May 2, 2019 Meeting

The SharePoint portal for Clarity Task Force members is invitation only to those members. The invitation needs to be accepted prior to accessing the portal or any document links. Ian Nosek will review access issues with Clarity Task Force members individually, he can be reached at ian@swanlibraries.net .

The group discussed some of the feedback from library colleagues regarding the purpose of Clarity. Some library staff wondered if the group was selecting a new ILS. Others did not understand how the group was formed.

BLUEcloud Analytics – Preview of Dossier Snapshots and Templates (Grant Halter, Data Analyst, SWAN)

Based on the facilitation at the first meeting of Clarity in April, the group surfaced issues with BLUEcloud Analytics (BCA). Dawne invited Grant Halter to show some of the direction that we can go in with BLUEcloud Analytics for libraries.

Grant Halter is looking for reactions to the content of the reports, the lists, are we showing the right things, the visualizations. Do not focus on sizing and colors as much, as these can be easily tweaked.

The BCA data analytics runs on a software platform from Microstrategy, which is configured and run by SirsiDynix. The new feature available is called “dossiers” which is best conceptualized as a “book with chapters.” The dossier is preconfigured by SWAN and as you click through the chapters, the data visualizations will change. It is also possible to export the dossier as a PDF document.

The BCA dossier drafted and shared with Clarity is common statistical report that could be filtered by library. Each library could select their own library, and the data would change within the dossier framework. (The packet for the June 5, 2019 Clarity Task Force has screen captures as examples.)

Monthly Snapshot Dossier Demonstration

Grant Halter present the BCA dossier’s 4 “Chapters” and 21 “Pages” of the Circulation Activity. This dossier has a lot in it, with the intention it could be reduced. Clarity reaction to the overview of the BCA Monthly Snapshot dossier demonstration included the following:

- “Station Library” is a somewhat confusing term. This could be “At Your Library” or “Items You own” or “Your Items Everywhere” or “Your Items at Your Library”
- In essence this report is “what, where, and who?” It is where the library collection is circulating.
- If a report has double information within the report, this could be a barrier for the user.
- Where are we aiming these reports? What is the user? Are they users that are not using BCA? This may not be for the “power users” but be great for the majority of libraries that need a canned activity report for their director and trustees.These reports with visualizations could also have a use for managers and directors to be used in management team meetings.
- Labels like “Cat 1” may be unknown to some staff, so label naming is important. Using natural language, but also making sure to reference the source of the data will really help report recipients understand what they are seeing. For example, 3 letter codes for libraries will not be understood by directors and particularly board members.
- These numbers are good for managing staff, deciding on a self-check to be added, etc.
- If the report could have tick boxes to turn on or off certain elements, even better.

This is an excellent start, especially if we make this per library. There may be too much in this dossier, but it depends on the goal and audience. Here is a summary of the direction SWAN should go in:

- Better labels
- Brief explanations on sections
- Make this a brief starting point, do not overwhelm
- Focus on “The what, the where, and the who”

For comparison, last meeting’s demonstration of Collection HQ showed that product has more direction on <u>which decisions to take</u>. So other BCA dossiers that are “role dependent” in the library can be created to help with those decisions.

BCA Templates demonstration

This approach would be for library power users. This report would be all the possible report objects in BCA put into a single report, where a library could pick and choose what they want. The report template can drag and drop objects into the filter.

Clarity comments:

- How soon can we have this? (Amy)
- Will SWAN provide open labs on how to use these? (Yes, likely a GoToMeeting online)

Dawne will have examples of this template-based report for Clarity Members in their BCA folders.

Review of SWAN Strategic Planning Survey from August 2018

This was the membership survey sent out in August 2018 as part of strategic planning. There are comments in this survey that pick up on the frustration, but we will need to drill down into this more to get better insights.

The main takeaways of the survey for Clarity:

- Dissatisfaction exists amongst some library staff.
- Symphony Acquisition users voiced their frustration.
- While there is unhappiness among staff, going through a migration is not desired.
- Survey comments about "duplication" of records could be a reflection of post New 19 bibliographic data, or it could be a misunderstanding of the various formats. This is an example of the strategic planning membership survey not providing enough precise information to take action on, but the survey was enough to pick up on a need for Clarity to determine if the issues are (1) SWAN, (2) Member Libraries, or (3) the Vendor. Regardless of the root cause, any improvements to the way Enterprise displays these records in search results would be helpful and beneficial to users.

Responses from "What does SWAN do well?" [positive sentiment]

Some of the things "SWAN does well" reflect continued improvement within areas of SWAN support. Clarity was eager to discuss the frustration they find within WorkFlows.

Responses from overall rating "What changes would SWAN have to make for you to give it an even higher rating?" [negative sentiment]

Symphony ILS dissatisfaction discussion among Clarity Task Force reps generated this list of Symphony WorkFlows issues:

- WorkFlows editing compared to OCLC Connexion is difficult. (Kerry)
- WorkFlows searching should be easier, but at the same time, it has to be precise. The front-line staff expectations are more around Google, where the search was "close enough." (Michelle
- WorkFlows placing holds faster and efficiently would be a great solution. There are a lot of clicks to complete this task. Staff that do this daily have the number of clicks down pat, but others who do not do this every day will find it less intuitive. (Ahren)
- WorkFlows Acquisitions limit to running one report at a time is a problem due to the Symphony Report queuing reports up one after the other. (Kerry)

- Workflows circulation merging patrons when multiple user entries are found. (Cindy)
- WorkFlows Field sorting within searches, beyond title, but with formats. (Kristina)
- Expanding the number of search results you can sort on. (Michelle)
- WorkFlows SmartPort configuration for Cataloging Libraries, making the configuration work as intended. (Colleen)

MAGIC and LINC libraries joining SWAN: was the WorkFlows frustration present before joining SWAN?

- Not really. There is more data in SWAN, which takes adjusting to. (Michelle)
- There was a bit more rules with proper cataloging in LINC. (Kerry)

Dawne noted that it will help to determine “exception processing” versus “normal processing.” We need to answer the following questions:

- How often does it happen?
- And if the exception happens twice a day, how long does that take?

If 90% of the daily activity is normal processing and is completed easily, the 10% exceptions could be the areas to focus on.

Issues identified should be conveyed as the following, particularly if the membership conversation moves towards “we need a new ILS.”

- SWAN is a large consortium with a lot of data.
- Is the issue the software tool?
- Is the frustration due to we have not adopted best or common practices?

Evaluating and determining next steps in addressing area of concern/area of improvement

Clarity reps discussed the following ideas:

- New Survey (not effective in this case, not precise enough, based on the August 2018 survey)
- Roadshow
- Town halls
- One on one interviews
- Focus groups
- Delineate the expectations of a “successful” relationship with the consortium.
- Design a roadshow for Clarity reps that can be tested out their library. This could be combined with a SWAN expert/consultant to help outline the needed fixes. Create questions in advance and let staff think about them.

How to seek additional input from membership: develop a process to solicit member feedback

Following this discussion above, Clarity settled on the following as the idea to gather precise feedback.

1. Hold a “diary/journaling activity” for a 1-week period among Clarity rep libraries, where staff record the pain points at the public service desk, frustrations encountered in cataloging, acquisitions, and elsewhere.
2. Compiled these observations.

3. Hold regional meetings to affirm the results Clarity compiles.

How to seek additional input from membership: Time – this summer?

Timeframe: get input from Clarity libraries on diary/journaling activity in June & July.

Hold SWAN town halls in August where the issues uncovered are shared and discussed.

How to seek additional input from membership: Facilitation

The town hall meeting approach will be handled by Dawne Tortorella and Clarity.

Calendar Setting (Date/Time/Place) through June 2020

Next meeting: Wednesday, July 10 (10-12:30) - https://www.librarylearning.info/events/?eventID=28764

Respectfully submitted by Aaron Skog

Clarity Task Force – Gathering Insight

June 26, 2019

During the summer, members of the Clarity Task Force and SWAN staff will gather input from our members to help identify and surface areas of concerns regarding our Library Services Platform.

The following methods of research will be used:

A. Time Studies of WorkFlows (screen recording at Circulation Desk) [Clarity Task Force]
B. Diary Studies (at Circulation and Public Service Desks) [Clarity Task Force]
C. Interviews [SWAN Membership]
D. Focus Groups [SWAN Membership]

The Time Studies of WorkFlows and Diary Studies will include libraries represented by Clarity Task Force members. Task Force members can help guide their colleagues in completion of these studies. Upon initial review of the studies, we can determine if including additional members in these studies would be beneficial to gathering input.

The interviews and focus groups will include members of the wider SWAN community.

A. Time Studies of WorkFlows (screen recording at Circulation Desk)

Purpose: This independent capture of WorkFlows activity will allow us to determine exactly what features of the software are most accessed and the efficiency of that work process. It will help identify areas where finding information of completing actions could be improved. It will reinforce potential differences in periods of the day and at libraries, providing a range of activity patterns to observe. We may also uncover areas where additional training or configuration of the interface could be helpful.

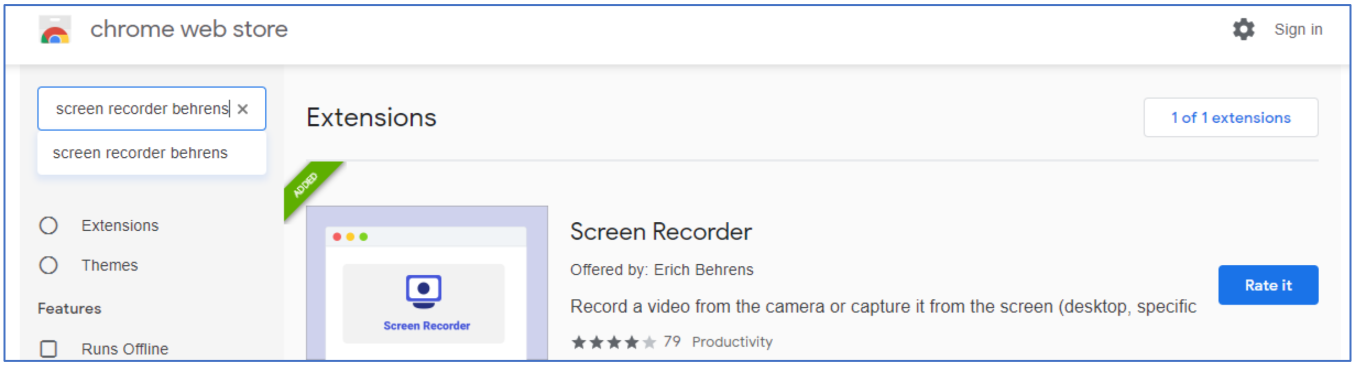
During the week of July 15th, Clarity members will be asked to help create screen captures at the Circulation Desk during the following time periods:

- Tuesday, July 16, 10:00 AM – 10:10 AM
- Wednesday, July 17, 12:30 PM – 12:40 PM
- Thursday, July 18, 6:15 PM – 6:25 PM
- Friday, July 19, 3:45 PM – 3:55 PM

Install the following Screen Recorder on the desktop that will be the recording station. Copy and paste the URL – direct linking within Word does not work.

https://chrome.google.com/webstore/detail/screen-recorder/hniebljpgcogalllopnjokppmgbhaden?hl=en

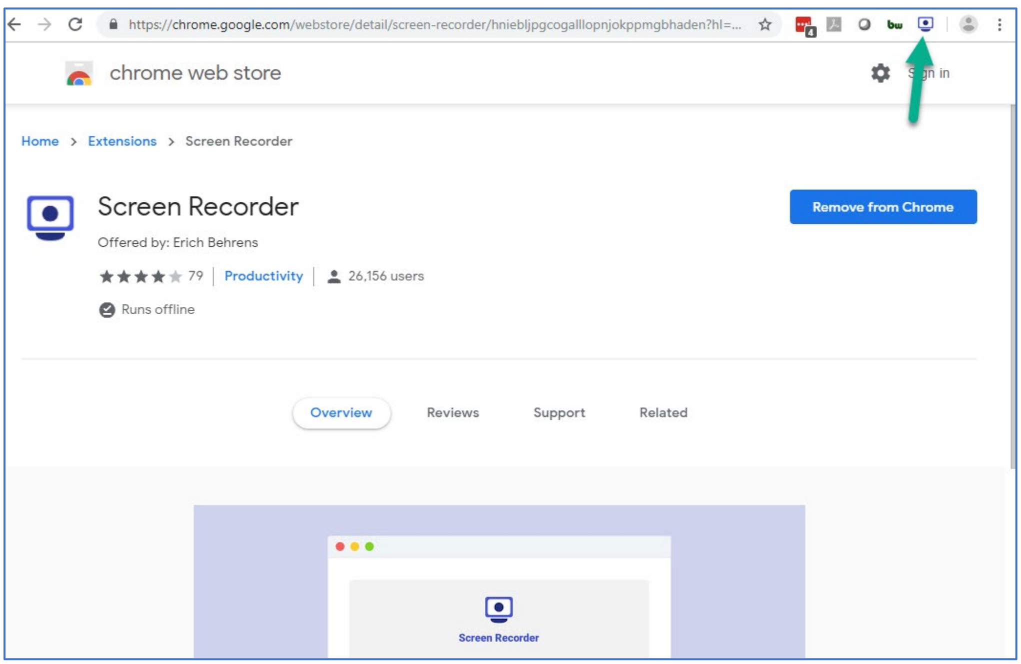
You can also find the extension by searching the chrome web store for *screen recorder behrens*.



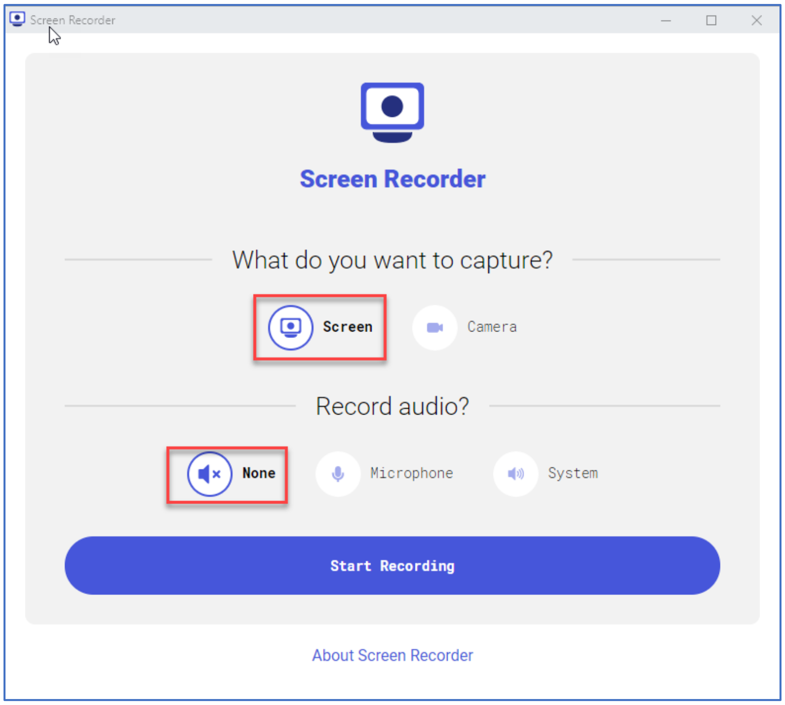
Practice recording a few times to get comfortable with the recording process.

Time Study Recording Steps:

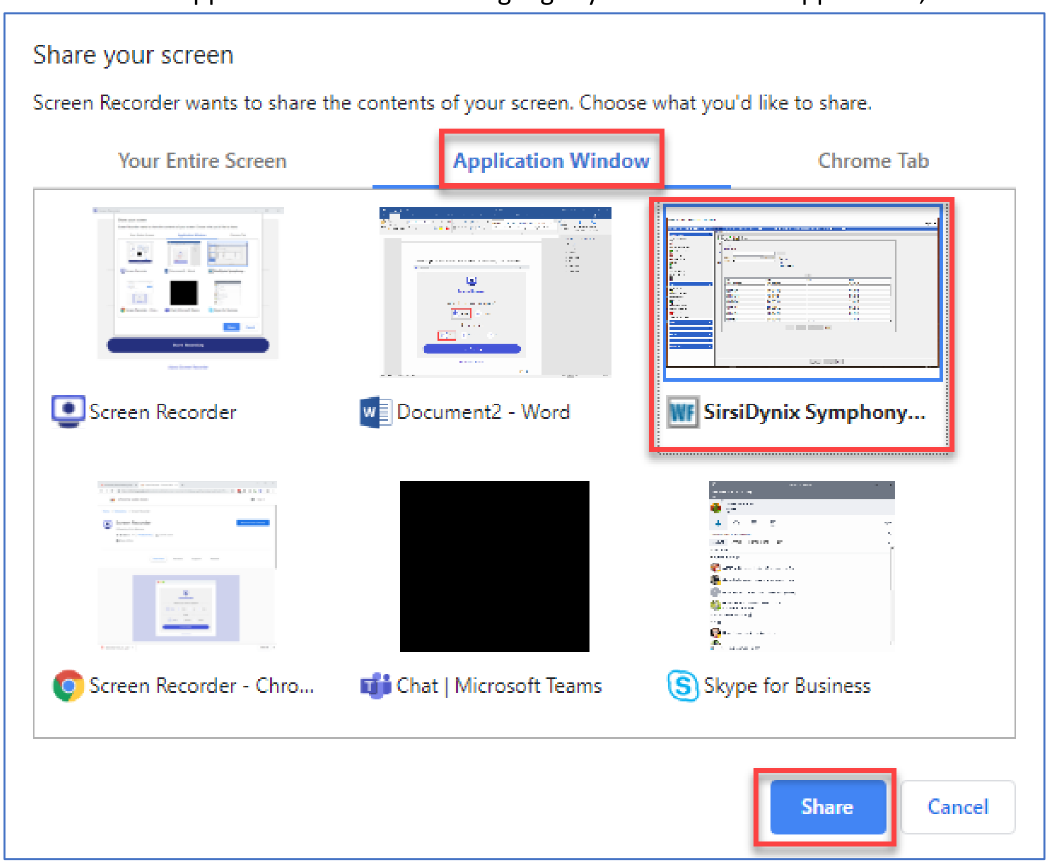
1. Start WorkFlows and make sure that it is open on your desktop.
2. Switch to the Chrome browser extension to start the recording.



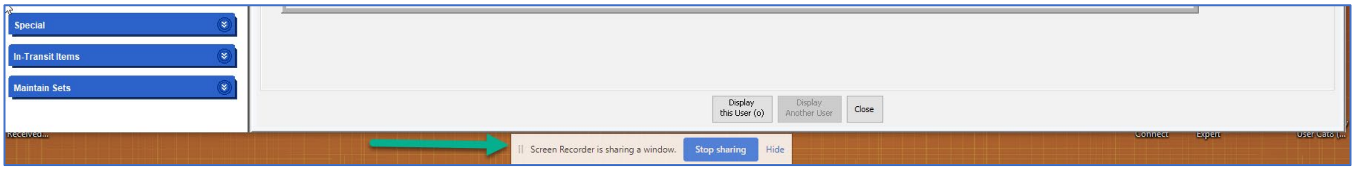
3. When activating the Screen Recorder, select Screen and None for audio recording. Then Start Recording.



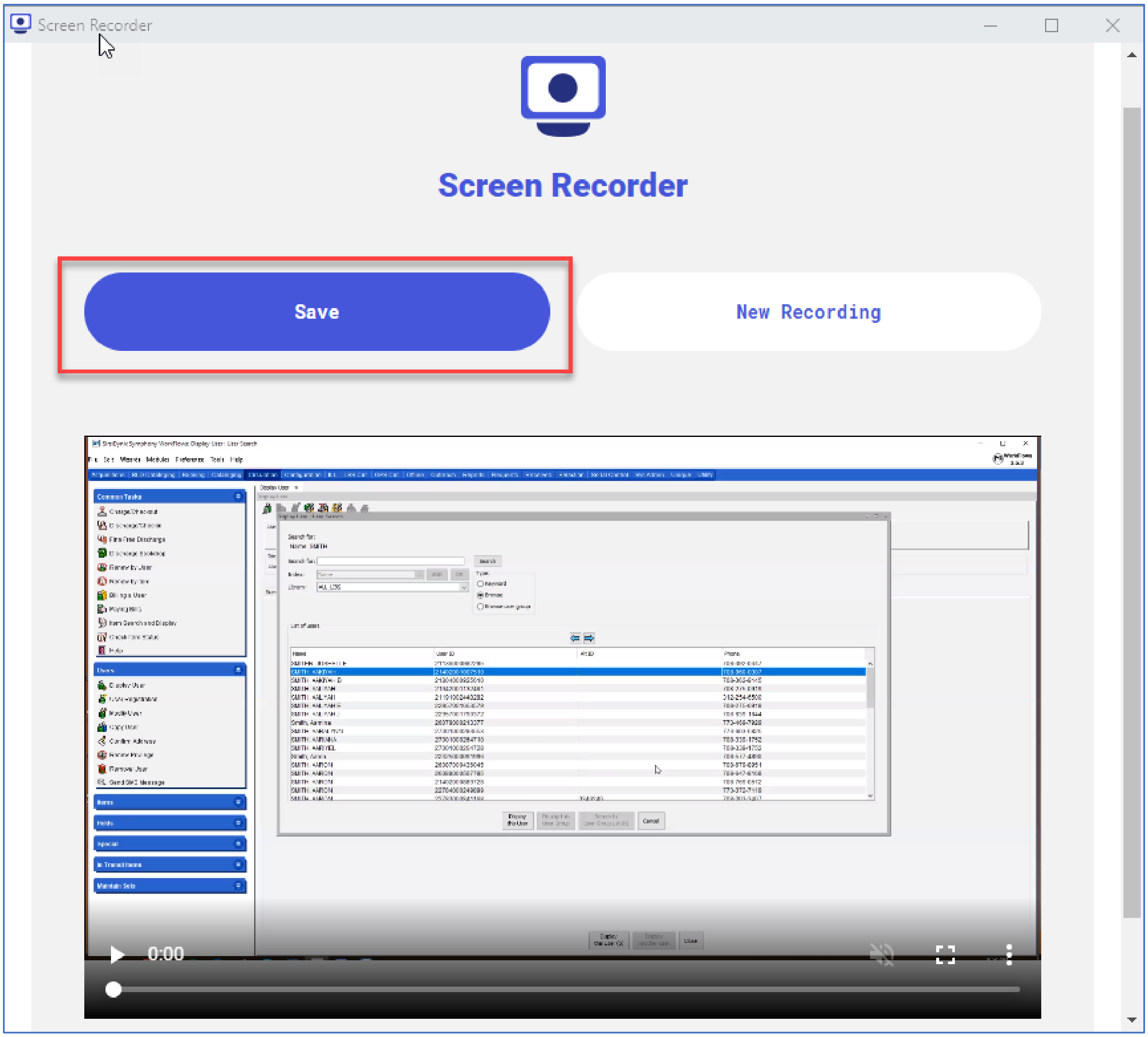
4. Select Application Window and highlight your WorkFlows application, then click Share.



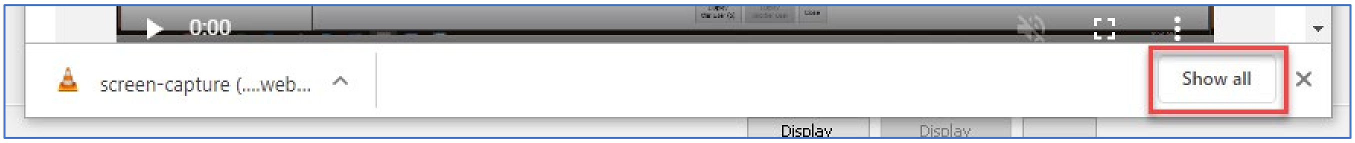
5. The recording begins. Conduct normal WorkFlows operations as usual for the 10 minute time slice. You may wish to resize your WorkFlows window a tad to allow the Screen Recorder window to appear below and not overlay your WorkFlows window.



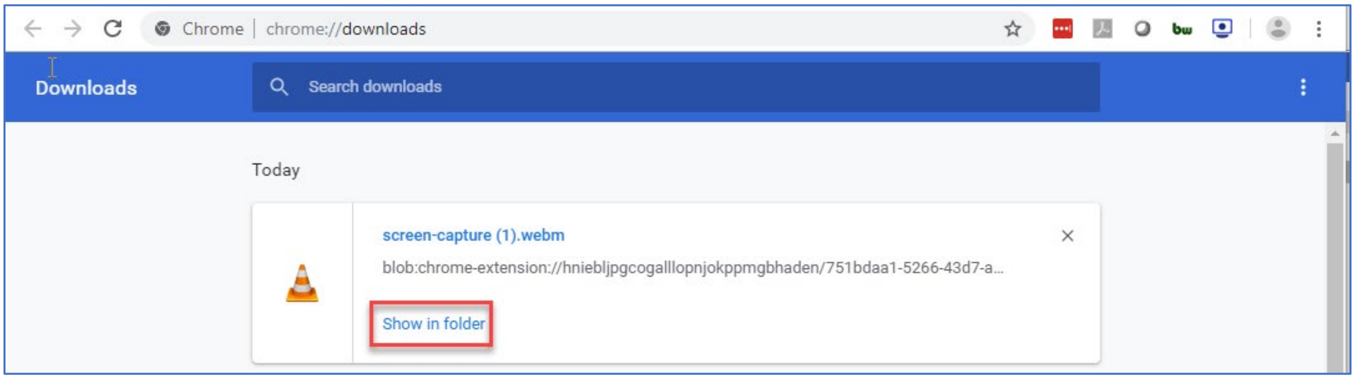
6. Click Stop sharing to complete the session.
7. Save the Screen Recorder session. You can also view the session with the embedded controls, if desired.



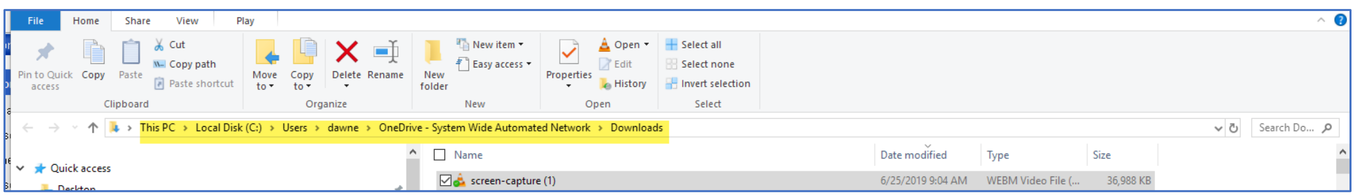
8. Notice where the screen-capture video is saved. Show All will allow you to see the file in the folder where it is stored.



9. Show in Folder will provide the full path of your screen captures.



10. The captures will receive incremental numbers when being saved, so don't worry about renaming those files.



11. These will be rather large files and we will determine the best way of sharing either through an ftp transfer or another method. Until that time, keep track of where the files are stored.

B. Diary Studies (at Circulation and Public Service Desks)

Purpose: Diaries or journals allow people to capture details about work encounters related to assisting patrons. A diary will be available for tracking personal comments about specific patron encounters (e.g. helped a patron place a hold and I encountered xyz). Each journal entry is guided by a short set of questions, with opportunity for the journal writer to add comments and observations. While these diaries could be distributed and recorded in electronic format, physical journals will be provided to allow more spontaneity and reduce barriers to entry.

During the week of July 22nd, Clarity members will distribute journals to colleagues to gather their input and observations in journal form.

Journaling Prompts:

Log your experience working in Symphony WorkFlows or Enterprise where you encountered problems helping a patron, either due to not finding the information needed, not being able to complete the requested task, or because of inefficiencies in the interface. Feel free to doodle, include screen shots, and any other artifacts you would like to include (e.g. smiley or poop emoji stickers)

1. What system were you using?
    a. Enterprise
    b. WorkFlows
2. How did this make you feel? How did the patron feel?
3. What task were you attempting?
4. Quick list of steps taken
5. What did you tell the patron?
6. How did you resolve the issue or workaround the problem?
7. Comments

Diary journals, emoji stickers and bookmarks with the prompting questions will be provided to libraries participating in the Diary Studies.

C. Interviews

Purpose: To conduct one-on-one interviews with staff using Symphony WorkFlows in their daily operations. The first set of interviews will focus on circulation functions. Interviews provide direct contact with the members working within the Library Services Platform application.

Structure: Tara and Crystal will conduct interactive interview sessions with circulation staff from three libraries to identify areas where we can improve training and documentation, identify and share strategies for efficiency, and provide enhancement requests to SirsiDynix. They will provide a written report summarizing findings and any recommendations, including follow-up or additional interviews, if appropriate.

Timeline: target of July

Participants:

- Jane Young-Acorn PL
- Barbara Bronkala- Assistant Manager @ Alsip PL
- Emily Cotterman- Itasca

Interview Script: Workflows Circulation Functions

Introduction

Hello, my name is Crystal a UX Consultant for SWAN and this is Tara the UX Manager at SWAN. We are here to better understand how you use Workflows for your everyday work in Circulation. I estimate that this interview will take up to an hour. During this time, we will go over some questions and I will ask you to show us some of our process is in Workflows as well. I will ask the questions and Tara will be taking notes. We would like you to treat us as if you're responsible for training us; we are here to learn.

Just a few things before we begin. We would like you to know that to the extent possible, we will take your comments to be confidential. We will take both your comments and other interviewees and compile them without names. Also, this interview is entirely voluntary on your part. If for any reason you would like to stop, please let me know. We can end the interview.
Do you have any questions for me?

We are going to proceed now.

Warm-Up Questions

- Tell me about your role in the library.
- How did you come to be in this role?
- What ILS's have you worked with—like Symphony, Horizon, Millennium?

Questions

1) Tell us about the last time you had difficulty searching for an item for a patron
    a) How did you search? What information did you have about the item?
    b) What limiters or facets did you use?
    c) How often do you find yourself searching for a topic, vs. A title, vs. An author? Etc.
2) Placing holds
    a) What is your first step when a patron comes up and wants to place a hold on an item?
    b) Walk us through your process in Workflows.

    c) "Becoming" By: Michelle Obama
    d) How would you change the pickup library for a patron?
    e) How would you suspend the hold for them?
    f) How would you cancel a hold?
    g) How would you cancel an available hold?
3) Talk about process running the pull list and handling missing items
    a) What times of day do you run the pull list? How frequently do you run it?
    b) What do you do when you can't find the item on the shelf?
4) Talk about process handling damaged items
    a) Items from your library for your patron
    b) Items from another library for your patron
5) Billing a patron and paying for an item
    a) Items from your library for your patron
    b) Items from another library for your patron
6) Talk about what you do with items that are not on your clean holdshelf report?
7) Registering new patrons
    a) Tell us step by step how would go about registering a patron.
8) Tell me about your process to modify a due date
    a) On a patron-by-patron basis
    b) Modify due date for an entire day

Follow Up

- Is there anything else you think we should know?
- You find a library genie and you get one wish to come true, on Workflows. What is your one wish?

Conclusion

Thank you so much for participating. Those are all the questions that we have. If anything, else occurs to you after this interview, please let me know. We might follow up with you if we have any follow up questions. Do you have any questions? Thank you!

D. Focus Groups

Purpose: To allow members to engage with a small group of colleagues in a structured discussion seeking to review processes, identify methods of current practice, limitations of the environment, workarounds developed to solve problems or create efficiencies, methods of seeking assistance, and desired outcomes.

Structure: Dawne will moderate up to 4 focus groups consisting of between 5-7 member participants. SWAN staff will serve as observers to provide note taking. A written report of the focus group recurring topics and themes will be used to identify areas where more evaluation and inquiry is needed.

Timeline: August, 2019

Participants: Recruited through SWANcom/L2 registration

Focus Group Discussion Questions*:*

June 25, 2019

Thank you for participating in this focus group. Your honest feedback and discussion is critical to our work in identifying areas that work well, as well as those that require attention. I will be asking a series of questions to elicit discussion.

Staff will be observing and note taking during the focus group. These notes will be used to compile the final written report consolidating feedback from all groups. Your feedback will be anonymized in our reporting, so please share your thoughts and experiences freely.

1. Explain your role in the library and how you interact with Symphony WorkFlows on a daily basis.

2. If you have a question or are unsure about a process or procedure, where or who do you go to for assistance? How successful is this process for you?

3. Please describe one scenario which presents the most difficulty in assisting patrons while using Symphony WorkFlows.

4. What situation is the most difficult to manage in the software in your daily work, either patron related or as part of your ongoing duties?

5. Have you heard colleagues discuss difficulties in working with Symphony WorkFlows? If so, can you share their experiences to the best of your knowledge, and to what degree you agree with those assessments?

6. What resources have you used to learn more about Symphony WorkFlows and when was the last time to referred to one of these resources?

7. Have you attended any training sessions? If so, what was your experience? How about online training through SirsiDynix Mentor?

8. Do you manage staff? What areas do new staff struggle with the most? How do you help them?

9. Describe a small case “workflow” that works well within Symphony WorkFlows.

10. How involved are you in determining circulation and hold map rules? Do you find your policies easy to explain to patrons when asked about items within your library as well as other SWAN libraries?

11. Are there features of Symphony WorkFlows that your library currently does not use, but you would like to pursue? Perhaps you don’t know what those features might be, so let’s share enhanced features you know your library or others are using.

12. How often do you experience disconnects or failures in connecting to Symphony WorkFlows? Do you notice periods where the system is slow?

13. What additional information would enable you to better manage your work within Symphony WorkFlows? Or functionality?

14. If you have recently joined SWAN as either a member of a smaller consortium or a standalone library, what differences are noticeable – both positive and negative.

15. How often do you interact with colleagues at other SWAN libraries? Do you attend user group meetings? If so, are they useful? If not, how could they be more worthwhile or better suited to your work schedule?

16. What other Library Services Platforms (ILSs) have you worked on and can you offer come observations and comparisons?