

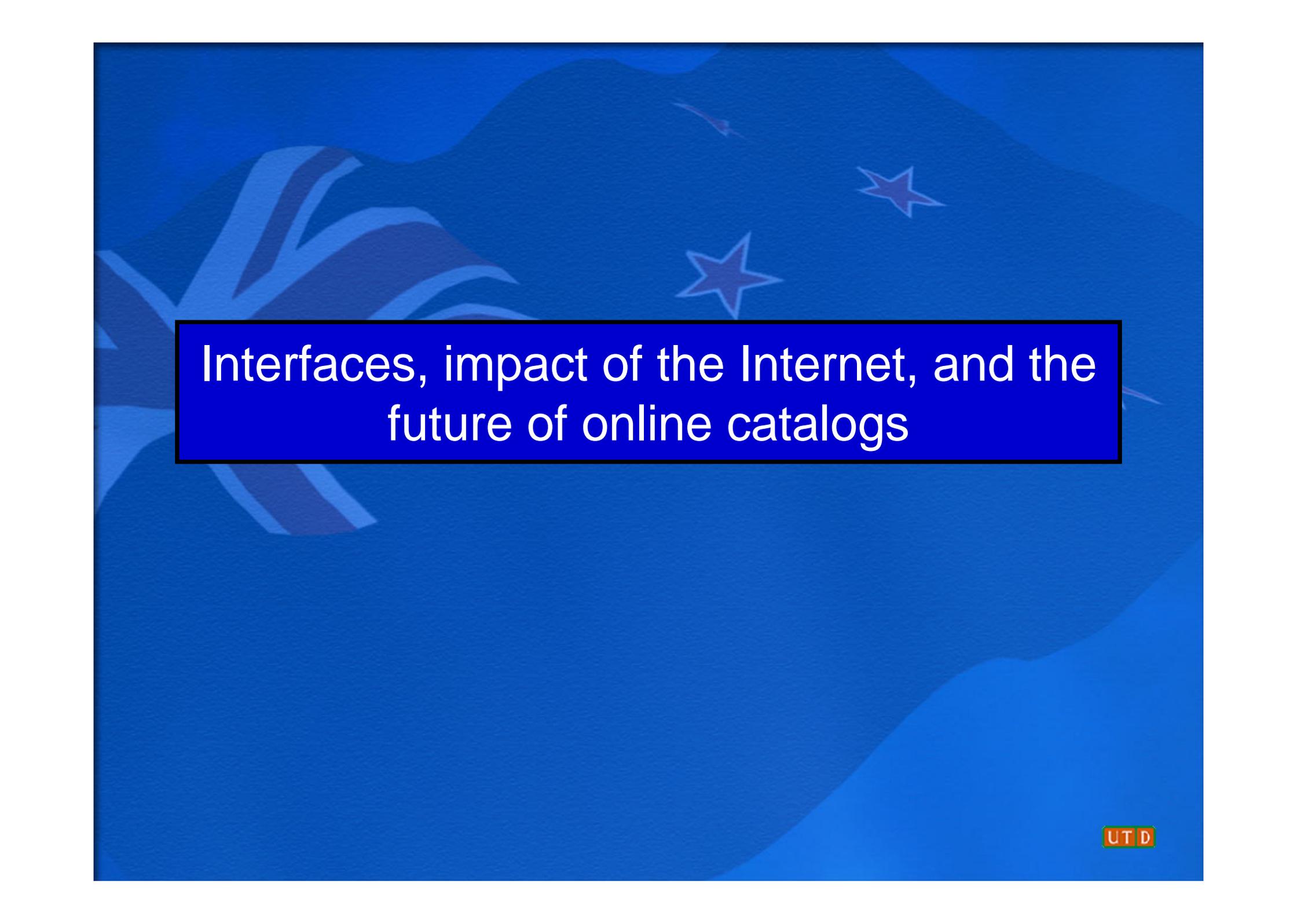
**Discovering the Library:
Finding the Hidden Barriers to Success
Using the Catalog**
IATUL 2008—Auckland, New Zealand

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?

The background is a solid blue color with abstract, lighter blue shapes that resemble waves or stylized mountains. There are three five-pointed stars scattered across the upper half of the image. A black-bordered white box is centered in the middle of the slide, containing the main title text.

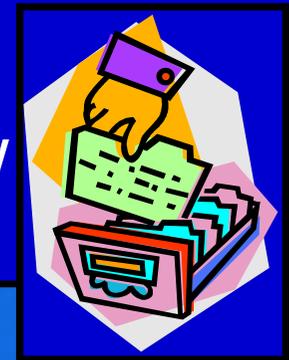
Interfaces, impact of the Internet, and the future of online catalogs

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

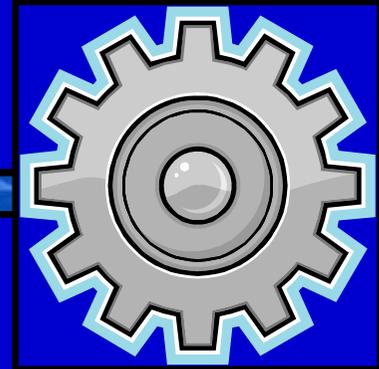
- Customers had to figure out
 - An alphabetical list (titles, authors, subjects)
 - Filing rules (I know I never achieved proficiency)
 - Tracings (to locate books on similar subjects)
- When periodical indexes were printed
 - Had to navigate subject headings and think about synonyms for the topic
 - 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)

BIG ORANGE SEARCH SYSTEM



Ask Us! "Classic" Catalog Find Articles My Account Library Home

Enter your query here

Search

Print Help

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

- Association
- Spelling variation
- Translation
- Thesaunus term
- Discovery trail

[!]



INFOKAT

UNIVERSITY OF KENTUCKY LIBRARIES ONLINE CATALOG & GATEWAY

[Search](#) [My Library Account](#) [encore](#) [Help](#) [Exit](#)

[Basic Search](#) [Guided Keyword Search](#) [Course Reserve Search](#) [New Titles](#) [Encore](#)



Encore is an alternative catalog search tool for InfoKat.

Interface last updated November 14, 2007 (Voyager 6.2). Please send comments and/or questions about InfoKat to [Systems Librarian](#).



New Search Tags AskUs! Help

Books & More: Twin Cities

Articles

Search for

GO

Limit to: All items that contain my query words anywhere in the record

[My Preferences](#)

[Advanced Search](#)

Hello, Guest

[Sign in](#) to have full access and to keep things. [Why sign in?](#)

e-Shelf To enter my workspace

What is Library Search?

Library Search is the University of Minnesota Libraries' new web interface. Use the tabs above to find print, electronic, and multimedia items:

Books & More: Twin Cities (MNCAT Catalog)

Search here for print materials, videos, sound recordings, e-books, e-journals, databases, and indexes in Twin Cities campus libraries and special collections. Note that journals, magazines, databases, and indexes will be listed by title only, and individual articles will not be listed.

Articles

Search in our databases and indexes here, where you'll find journal, magazine, and newspaper articles and more. By default, you'll search across a broad range of general resources, but you can use a drop-down menu to specify a subject area to search. Note that these searches may take more than a few seconds to complete.

Library Search is currently a beta test. [We'd love your feedback.](#)

Library Links

- > [Library Home](#)
- > [Libraries and Collections](#)
- > [Catalogs](#)
- > [Indexes](#)
- > [E-Journals](#)
- > [Subjects](#)
- > [Services](#)
- > [About Us](#)

U of M Twin Cities Library Search^{beta} - Find it Get it! [New Basic Search](#)

[Other U of M Catalogs](#) [Non-U of M Catalogs](#)

[Fix It](#) [Ask Us](#) [Feedback and Comments](#)

[U of M Libraries Home](#) © 2007 Ex Libris LTD

Results

- Facets

- Ways to further define the search
- Easier?
- Could be presented as an image
- Some databases are using this approach-- SCOPUS

- Format

- Call number
- Date
- Available/checked out
- Language
- Location
- Subject

New Search

Find: new zealand wine

Search

Clear

Group Results

Sort Results

Filter Results by Date

NEW Zealand

WINE & wine making

WINE industry

AUSTRALIA

PINOT noir (Wine)

MARKET segmentation

UNITED States

CHARDONNAY (Wine)

GOVERNMENT policy

NEW Zealand -- Economic aspe...

35 Results (1 - 3)

At the sweet spot.

None

Mar 29, 2008 Economist

Abstract Only



Golf, Wine and Sheep in New Zealand.

Howard, Hilary

Nov 4, 2007 New York Times (1/1/1985 to present)

Abstract Only



The distinctive flavour of New Zealand ...

Parr, Wendy V.

Sep 1, 2007 Food Quality & Preference

WINE industry

WINE & wine making

AUSTRALIA

PINOT noir (Wine)

UNITED States

CHARDONNAY (Wine)

NEW Zealand -- Economic aspe...

LABOR supply

MARKETING strategy

HAWKE'S Bay (N.Z.)

14 Results (1 - 3)

At the sweet spot.

None

Mar 29, 2008 Economist

Abstract Only



Golf, Wine and Sheep in New Zealand.

Howard, Hilary

Nov 4, 2007 New York Times (1/1/1985 to present)

Abstract Only



The distinctive flavour of New Zealand ...

Parr, Wendy V.

Sep 1, 2007 Food Quality & Preference

WINE industry

PINOT noir (Wine)

AUSTRALIA

UNITED States

NEW Zealand -- Economic aspe...

LABOR supply

MARKETING strategy

WINE -- Flavor & odor

FRUIT wines

EXPORTS

7 Results (1 - 3)

At the sweet spot.

None

Mar 29, 2008 Economist

Abstract Only



The distinctive flavour of New Zealand ...

Parr, Wendy V.

Sep 1, 2007 Food Quality & Preference

Abstract Only



New Zealand Places Bets on Red.

Gaiter, Dorothy J.

Apr 20, 2007 Wall Street Journal - Eastern Edition

FRUIT wines

EXPORTS

UNITED States

AUSTRALIA

OREGON

BEAUJOLAIS (France)

BRANDY

LIQUORS

SHERRY

MERLOT (Wine)

2 Results (All)

New Zealand Places Bets on Red.

Gaiter, Dorothy J.

Apr 20, 2007 Wall Street Journal - Eastern Edition

Abstract Only



Wine Enough To Please Them All.

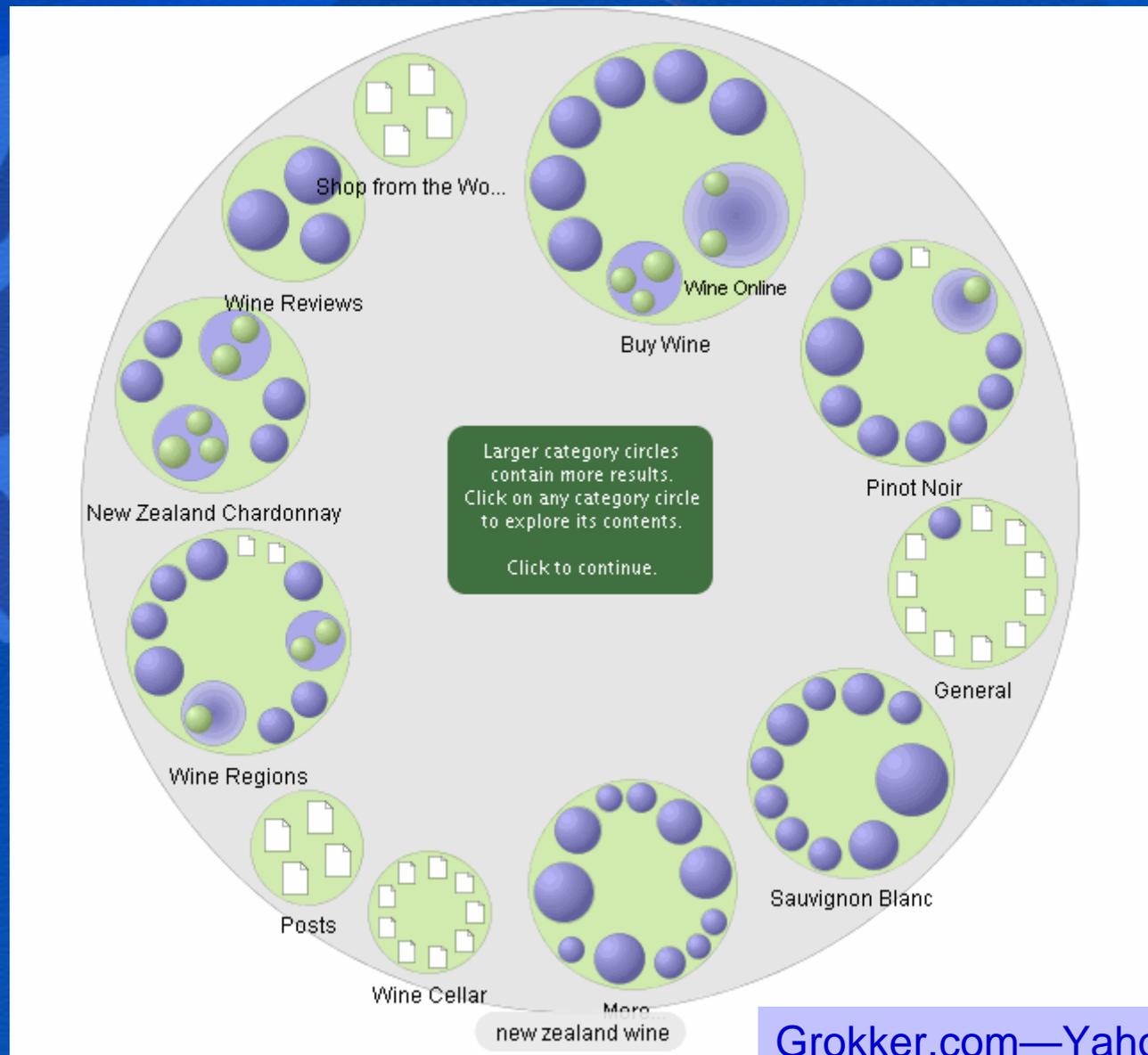
Apple, Jr., R. W.

Nov 12, 2003 New York Times

Abstract Only



Visual Search--EBSCO



Grokker.com—Yahoo!

[Author](#)

Results 1 - 10 of 31 for **new zealand wine**, sorted by:



World famous in New Zealand : how New Zealand's leading firms became world-class competitors / Colin Campbell-Hunt ... [et al].

Year: 2001.
Subject: International business enterprises -- Management. -- New Zealand, Industrial management -- New Zealand., Success in business -- New Zealand., Competition, International., International business enterprises Case studies. -- Management -- New Zealand

Table of Contents:
Ch. 10 Overview: The Evolution of Competitive Capability in **New Zealand**

Found: New (8) Zealand (8) wines (1)
Main Library 650.10993 W927 **Available**



Select Location

Showing results from:

Refine

Availability
> Available (32)
> Not available (1)

Publication Date
> 2006 (7)
> 2004 (5)
> 2001 (3)
> 1994 (3)
> 1997 (2)
> 10 more...

Topics
> Wine and wine making (14)
> Tourism (6)
> Viticulture (2)
> Wine industry (2)
> Small business (2)
> 35 more...

Geographical
> New Zealand (2)
> Australia (1)
> Oceania (1)
> Asia (1)
> 2 more...

Chronological
> 20th century (1)

Author
> Hall, Colin Michael (2)
> McCarthy, Ed (2)
> Foulkes, Christopher (2)
> Jackson, Ron S. (?)



Larousse encyclopedia of wine / general editor, Christopher Foulkes.

Year: 1994.
Subject: Wine and wine making -- Encyclopedias.
Table of Contents:

The Enjoyment of **Wine** - Michael Broadbent
Wine: The Taste, the Enjoyment -
The History of **Wine** -

Found: wine (74) New (6) Zealand (4) wines (6)
Editions: All editions (2)
Main Library 641.22 L332 **Available**

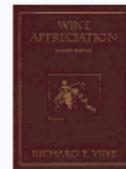


Wine appreciation / Richard P. Vine.
Vine, Richard P.

Year: c1997.
Subject: Wine and wine making.
Table of Contents:

2 **Wine History** -
3 **Wine and Human Physiology** -
4 **Wine Service** -

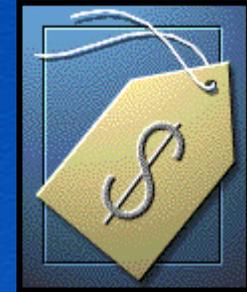
Found: wine (10) New (2) Zealand (1) wines (10)
Main Library 641.22 V782w **Available**



Global wine tourism : research, management / Jack Carlsen and Stephen Charters.

Year: c2006.
Subject: Wine tourism Case studies.

Oklahoma State University catalog
Cloud tag



The Pricetag is Steep for the 21st
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**



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

- *Handbook of Usability Testing* (Dumas and Redish). Norwood, N.J.: Ablex, 1993.
- *Usability Testing: A Case Study* (Chisman, Diller, and Walbridge), *College and Research Libraries* Nov. 1999, pp. 552-569.
- 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

UTD The University of Texas at Dallas **McDermott Library Catalog**

[Articles & Databases](#) [Ask A Librarian](#) [Pay Fines/Fees Online](#) [Search Other Library Catalogs](#)

[New Search](#) [My Account](#) [Login](#) [My Bookbag](#) [Request](#) [Exit](#)

The University of Texas at Dallas

[Basic Search](#) [Advanced Search](#) [Course Reserve](#) [New Titles](#)

Find This:

FIND IT

Find Results in:

Keywords Anywhere
Title - Omit first word "A," "An," "The"
Journal/Periodical Title
Author (Enter the Last name first)

[Narrow My Search](#)

Search Tips:

To limit searches to a particular collection or type of material, click on the "Narrow My Search" button **before** entering search terms. For example, to find only videorecordings click on "Narrow My Search" and choose either videorecording under Format or DVD/Video under Collection. Narrowing remains in effect between searches until the **Clear Settings** button is clicked. Note: This function works only on Keywords Anywhere, Title, Journal/Periodical Title, and Title Keyword searches.

The Keywords Anywhere search looks for the desired words anywhere in a record. Multiple words are combined using AND, for example space physics is searched as space AND physics. To search for words as a phrase, enclose them in quotation marks, "space physics".

Leave off the first word "A," "An," "The" (or the foreign language equivalent) when doing a Title search. For example, enter **petit prince** rather than **le petit prince**.

Type the last name first for author searches. For example, type **Carson Rachel** to find books by Rachel Carson.

[New Search](#) [Title List](#) [Headings](#) [Search History](#) [Search Help](#) [My Account](#) [Login](#) [My Bookbag](#) [Request](#) [Exit](#)

[Help Index](#)

[Interlibrary Loan Request](#)

[Return to Library's Homepage](#)

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

Results for: Title Keyword = new zealand

Search Results: Displaying 169 of 395 entries

◀ Previous Next ▶

Brief View

Long View

Table of Contents

More Like This

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.

Publisher: Boston, MA : G.K. Hall, 1984.

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

The screenshot shows the McDermott Library website search interface. The 'Quick Limit' dropdown menu is circled in blue, and an orange arrow points from the text above to it. The search results show 'sprawl a compact history' and '75 records per page'.

Search Tips:

- To narrow your search, click on the "Narrow My Search" button **before** entering search terms. Or choose a limit from the Quick Limit drop down menu. Narrowing remains in effect between searches until the **Clear Settings** button is clicked. (Note: This function works only on Keyword(s) Anywhere, Title, Journal/Periodical Title, and Title Keyword searches.)
- The **Keyword(s) Anywhere** search looks for the desired words anywhere in a record. Multiple words are combined using **AND** (space physics is searched as space **AND** physics). To search for words as a phrase enclose them in quotation marks ("space physics").
- When doing a **Title** or **Journal/Periodical title** search, omit the first word "A," "An," "The" (or the foreign language equivalent.) Enter **petit prince** rather than **le petit prince**.
- Type the last name first for author searches. For example, type **Carson Rachel** to find books by Rachel Carson.

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, Endecca, 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!

The background is a solid blue color with stylized, darker blue shapes representing mountains and a tree on the left. There are three five-pointed stars and two birds in flight scattered across the upper half of the image.

Focus on the User

The background is a solid blue color with stylized, darker blue silhouettes of mountains and a tree on the left side. There are also several white, five-pointed stars scattered across the upper half of the image.

Questions?

Ellen Safley
safley@utdallas.edu