FLICC Symposium Explores End User Training and Support

Should librarians take the lead in training agency staff and public users to access electronic information resources? What are the costs and benefits to the library if staff embrace the training role?

On November 13, the annual Federal Library and Information Center Committee (FLICC) Symposium on the Information Professional brought librarians, information technology professionals, information product vendors, and training specialists to the Mumford Room to explore how training programs impact federal libraries. Titled “End User Training and Support: A Role for Librarians,” the symposium addressed varied training strategies, ranging from help-desk handouts to formal classes and Web-based instruction.

Keynote Speaker Carol Tenopir of the School of Information Sciences, University of Tennessee, presented an overview of the current state of electronic information products. She predicted that librarians would continue to play a major role in designing subject-specific Web sites which link to different resources. Patrons must be taught how to use new interfaces and resources to find what they need. “Teaching users to fish, whether its catching those little four-inch guys or becoming an expert angler, is one of the most important roles for librarians today,” Tenopir said.

Perspectives on training

Three information resource trainers described their programs and strategies in the morning session: Jim Bradley, Systems Integration Analyst, US Army Training and Doctrine Command; Janie Butler, Applications Consultant, LEXIS-NEXIS; and John Auditore, Research Librarian, National Institutes of Health Library.

Bradley advised librarians to build training around their agency’s mission to convince managers that it is an investment rather than a luxury. He contrasted group-based instruction, which is resource- and labor-intensive but works well for teaching computer skills, to computer-based training, which demands a large initial outlay in creation and design, but encourages individual users to work at their own pace. He reminded trainers to ensure that students have the necessary prerequisites, to make sure that students know how the training will be used in their work, and to offer homework and follow-up activities so users continue to apply their new skills.

Butler proposed that information software vendors may sometimes be the best people to train users on their systems. Vendors are intimately familiar with their information products, they are aware of the latest program updates, and they have collected anecdotes about how the product may be used. Butler invited librarians to work closely with vendors to tailor training to the needs of the library’s users “We very much respect the role of the librarians and appreciate the information they can provide to trainers,” she said.

Auditore described the NIH library training program. “It is our vision that the NIH Library will be the focal point for the NIH community, valued in particular for providing vast electronic resources,” he said. Members of the library’s end-user training team provide instruction, develop seminars and instructional materials, and stay current with new software releases. The training program includes instruction in medical and biomedical databases, searching the Web, and reference management software. NIH librarians conduct instruction in the researchers’ offices and labs so as to better evaluate users equipment and information needs. Auditore explained that the team will expand the training program to include Web-based tutorials and chat rooms.

FEDLINK Network Program Specialist Meg Williams, who moderated this session, noted that each speaker had approached the topic of training in a manner consistent with their professions --information technology, sales, or librarianship. She suggested that library managers consider different approaches when deciding who should train end-users. “Wherever you can, pool your resources and team teach,” Williams said. “It is a matter
of blending different kinds of instruction into the best answer. I do not think there’s any single area of turf that needs to dominate.”

Evaluating training costs and benefits
Williams presented the day’s next session, “Management Issues: Return on Investment in End-User Training.” She outlined formulas for estimating training costs, and suggested ways in which librarians might show managers how the training literally “pays off.” Trained information seekers spend less time and money online, Williams pointed out, and spend less time offline weeding through poor search results. Other benefits for trainees include self-sufficiency, networking with other users, and perhaps becoming an instructor within their own departments.

She urged librarians not to worry that they might be training patrons to do their jobs. “We’ve all heard the saying ‘give a man a fish and hell eat for a day; teach a man to fish and you feed him for a lifetime.’ But what if you’re the fisherman and own the fleet?” asked Williams. “You have to make people develop a taste for deep-sea fishing and start a charter service.”

Understanding adult learners
Afternoon speakers discussed principles for training adults. Cathy Kellum, Training Supervisor at SOLINET advised trainers to make the material concrete for each audience. “You must draw on what they have been exposed to in order to reach them,” she said. Different learning styles also require different training methods and materials. “Catalogers learn very differently from reference librarians,” she said. “Catalogers are very linear; reference people skip around. Its important to build training which suits the group.” She suggested the following guidelines when developing a course:

To help users acquire knowledge--lecture, use transparencies, or hand out written materials.
To help them develop understanding--use demonstrations, problem-solving, dramatization, and discussion.
To develop their skills--use practice, role play, coaching, repetition, and simulation.
To change their attitudes--use role playing, simulation, and game playing.
To instill a value--use repetition, discussion, simulation, role play, or forced choices.
“Remember: what they hear they forget, what they see they remember, what they do they understand and remember even longer,” said Kellum. “Would you teach someone to dance by having them watch you?”

Anne Caputo, Senior Director of Information Professional Development, Knight-Ridder Information, Inc. compared the average audience to “life on the pond.” Attendees come to the surface of the pond occasionally to pick up small grains of food, Caputo suggested, but the rest of the time, they are just “bottom feeding”--worrying about work, thinking about lunch, etc. To catch the attention of “bottom feeders,” instructors need to repeat key points, and to get audience members’ attention by using verbal cues such as “point number two,” or “in conclusion.”

Caputo described an experiment that Knight-Ridder performed with its students: after instruction-based training on an information system, trainers tracked 500 students to see how many had logged on to the system one week, three weeks, three months, and six months later. Although the training sessions were highly rated, only 20 percent of the students logged on. “What a scary thing,” said Caputo. “The training had to change.” Her department developed new training sessions which engaged the students in exploratory learning; a follow-up survey revealed that the number of students logging onto the system increased to 60 percent.
Melissa Becher, Reference Librarian/Coordinator of Library Instruction at American University, laid out some guidelines for producing instructional library materials. “Well-prepared instructional materials can enhance the learning of your users,” said Becher. “If you just lecture, it’s like you are a voice in the wilderness. They have one chance to hear you.”

She gave attendees some layout and typography tips for creating engaging materials. She suggested using varied fonts and sizes to differentiate headers, using bold or italic rather than underlining, and avoiding all caps. Breaking up the text with bullets and headers makes handouts more readable, as does left-justifying text. When indicating a command that should be typed in by the user, it can be helpful to use a monospaced font such as Courier, which looks like the type produced by a traditional typewriter.

Becher cautioned against using bright paper for handouts. “A bright color is like a loud automobile horn,” she said. “It captures the interest but if sustained it is unbearable.”

For sample library materials, she referred librarians to the LOEX Clearinghouse for Library Instruction (http://www.emich.edu/public/library/loex.html), the Web site for an international archive of library instruction materials, including handouts, subject guides, course syllabi, exercises, tests, evaluation forms, instructional videos and software, slide-tape presentations, and audiotapes.

Cheryl Hunter, Chief, Special Programs Branch, Defense Technical Information Center, spoke about serving the library’s “stealth users” with Internet and help desk materials. “If your library has developed a presence on the Internet, you might never see those people who have questions,” she said.

Hunter chairs the CENDI User Education Working Group, which recently held a workshop on the impact of the Internet on customer service. Proceedings of this workshop are available on the CENDI site at http://www.dtic.dla.mil/cendi/publications/inet97_2.html.

No one formula for help desks emerged from the workshop, but Hunter outlined basic considerations:

Staffing--should a help desk be staffed at all times? Peak times only? Staffed by professionals or library technicians? Full-time, part-time, or rotating employees? “The people who are working on your help desk should be professionals and the highest grade you can spare.” said Hunter. “They should have a wide range of knowledge and be able to answer a variety of questions.”

Location--Should the help-desk be placed in a central physical site? Or multiple sites? Is it physically accessible? Available to walk-in customers? Or should it provide phone service only?

Hours of operation--When should the help desk be open? Hunter suggested that libraries staff the help desk as many hours as possible, because people would much rather talk to a person than leave a message. She noted that NTIS had hired an answering service for after-hours questions.

Information resources--Should the help desk provide ready reference materials? Internet access? Bookmarks and contact information for agency personnel, other agencies, and technical specialists? Sources of activity-specific information? Think of the wealth of expertise you have in other staff members,” said Hunter. “Your help desk people should know the functions of other departments and be able to reach them.”

Training--What should help desk staff know? Hunter suggested that help desk staff should be trained in customer service, Internet skills, and agency-specific information. Cross-training also helps them to better understand agency functions.
Procedures and Statistics--What procedures should be codified? Hunter said that her help-desk staff are provided with written instructions on service priorities. Help-desk usage statistics should be captured to provide measures for management reports. Statistics might reflect the number of calls received, peak traffic patterns, and frequently asked questions. More qualitative customer feedback, such as praise and successful use of the information provided, should also be recorded if possible.

“I don’t have a pattern or blueprint, but wanted to point out that all of these work together to provide help desk service,” Hunter concluded.

Web-based training

The final presenter, Sharon Fisher, Vice President of Human Technology, Inc., provided an introduction to Web-based learning. Fisher has more than 20 years of experience in instructional systems design, and her company has been producing Web-based instruction for a variety of federal clients.

“Internet-based training has to be in different modes than more traditional instruction,” said Fisher. She advised creators of Web-based courseware to consider carefully the experience and learning requirements of the students. Because Web products often deal with changing technologies, continuous learning support and updates may need to be built into the program.

She cautioned potential designers to know their limits. “In this medium, you really need to know when you’re going to fall off of the cliff,” said Fisher.

She differentiated linear Web-based information resources and lessons from “total learning environments.” The latter involve a variety of learning aids, including chat rooms and bulletin boards, background information, tests, links to other resources, and ongoing broadcasts about system updates or new course listings. Such systems also include resources for the instructors, such as registration programs, tracking of demographics, course evaluation forms, interactive test results, and lesson/course completion data. “This is a big investment. If you only have one course, you do not want to do this,” said Fisher.

“The worst thing you can do with a Web site is have old information,” advised Fisher. Librarians can work with professional Web instruction companies to create client-appropriate, up-to-date learning resources. “As we start to do more and more things at a distance, being able to integrate what we do in training with the resources available at libraries is key.”

Steps to Meaningful Learning Anne Caputo of Knight-Ridder Information, Inc. provided the following tips for trainers: Provide an overview of what will happen.

Establish (and get buy-in) for learning objectives.
Provide basics--use instructional building blocks.
Let learners fill in content.
Use learning checks.
Use simple worksheets or blueprints.
Have learners work collaboratively.
TABLE OF CONTENTS
TECH NEWS

Digital Libraries Part II: Coordinating Local and Global Systems
By Jessica Clark

A recent meeting of international affairs librarians at the congressionally supported US Institute of Peace (USIP) revealed the broad range of issues surrounding the creation of large-scale “digital libraries.” The meeting showcased the structure and content of the US Information Agency (USIA) Foreign Affairs Documentation Collection (FADC). The Corporation for National Research Initiatives (CNRI) is collaborating with USIA to develop the FADC, a secured information locator which will link users around the world to foreign affairs documents mounted online by federal agencies and institutes.

William Arms, Vice President of CNRI, discussed the technical challenges of constructing an access system for sensitive US foreign policy documents. Version control and secure delivery of these documents is key, as small differences in the wording of foreign policy agreements may reflect complex negotiations. Agencies will be responsible for authenticating digital documents, while USIA will be responsible for delivering them safely to users. CNRI has proposed an encrypted delivery process which is currently being tested by the US Copyright Office. More information on this “digital signature” encryption is available at http://www.loc.gov/copyright/cords/.

To ensure uninterrupted access, CNRI will require registration of documents through its global “handle system”. The handle system allows agency staff to register a document under one unchanging, unique name which is linked to various locations and formats. Agency document managers are responsible for updating the handle system when a document moves or changes. CNRI’s handle system meets the requirements specified by the Internet Engineering Task Force for Universal Resource Names (URNs). More information about handles is available at http://www.handle.net/overview.html, and more information on URNs is available at http://internic.net/.

The FADC will also include a tool, such as Excite, which allows users to search both the full text and Dublin Core metadata records of all indexed documents. CNRI plans to develop a browser plug-in which will include encryption, handle resolution, and searching tools. FADC centers, located at USIA posts around the world, will mirror FADC information, store cached documents for faster downloading, and distribute client software.

Carol Ludwig, USIA Special Projects Officer, emphasized that the FADC would not contain classified materials. The first phase of the project, to be completed by the end of 1998, will link to documents from organizations such as the Department of State, Commerce and USIP. Other interested agencies are invited to participate. The FADC pilot will not be internationally available; the development of a European mirror site will occur in the project’s second phase.

Margarita Studemeister, director of the USIPs Jeannette Rankin Library Program, discussed the library’s plan to create a digital collection of peace agreements for the FADC. Users will have access to the full text of peace agreements written in English since 1985. The agreements will be accessible both through the FADC and through the USIP Web site. The library has no additional funding for digitizing these agreements, but hopes to keep expanding the collection to include agreements written in other languages, retrospective agreements, and supporting materials such as speeches and images. Studemeister spoke to USIP patrons to discover who might use these online documents. She received enthusiastic responses to the project from professors, students, information professionals, and negotiators who have worked to draft such agreements.

Studemeister outlined her immediate goals for the project:
Creating standards for quality control, access, and retrieval; Integrating the project into the library’s workflow; Establishing a digital library internship; Organizing collaborative agreements and support; Outlining long-term requirements; and Determining how to measure outcomes.

Planning for long-term access
The development of the FADC is a case study for both small and large digital library projects.

Small library projects like the USIP collection should be designed so that they may be easily accessed by larger digital locator services. Project managers should identify potential users outside their agency to determine appropriate materials for digitization; create electronic documents in standard, Web-accessible formats; and assign staff members to oversee document quality, authentication, maintenance, and location control. Equipment, staff, and training costs for digitization projects must be incorporated into the library’s budget. Staff members should research opportunities for funding and collaborative projects.

Project managers for large digital information locator services like the FADC should consider how to handle security, ensure authentication, create persistent links, and facilitate large-scale searching. Agencies developing digital libraries with an international user base may also need to create mirror sites or train system support staff in other countries.

Evaluating materials for digitization
When choosing material for digital conversion, consider the following:

Informational value of documents, both as individual pieces and as part of a collection, Relevance to other online sources, Quality of originals, Replacement/surrogate/reference use, Archiving commitment/capability, Cost effectiveness over time, User perceptions, and Security and legal considerations. The National Archives recommends budgeting 10-15 percent of the initial cost of a system for equipment upgrades and data migration.

Creating access aids and metadata
An online document from the Library of Congress National Digital Library (NDL) program, titled Access Aids and Interoperability (http://memory.loc.gov/ammem/award/docs/interop.html), outlines various approaches to creating long-term links and catalog or metadata records which are compatible with NDL access and retrieval protocols.

The Library of Congress is working with CNRI’s handle system, and the NDL also recognizes OCLC’s Persistent Uniform Resource Locator (PURL) system (http://www.purl.org) as an option for creating long-term links. The full text of resources should be made available for searching whenever possible. In addition, four possible formats are suggested for the creation of bibliographic/resource records: MARC, Dublin Core, structured SGML headers in searchable texts, and structured SGML records which follow the EAD Document Type
The Dublin Core approach is a metadata standard designed specifically for digital resources. Developed in 1995 at a workshop organized by OCLC and the National Center for Supercomputing Applications, this evolving list of fifteen descriptive elements has been determined to facilitate online access and retrieval:

Title,
Author or creator,
Subject or keywords,
Description,
Publisher,
Other contributor,
Date,
Resource type,
Digital format,
Resource identifier,
Source,
Language,
Relation,
Coverage,
Copyright management.


The fact that the NDL offers four different approaches for creating resource records reflects the ongoing struggle between different standards. On January 29, FLICC’s annual Information Technology Update will showcase a variety of metadata initiatives in federal agencies. Co-sponsored by CENDI, “Metadata 101: Beyond Traditional Cataloging” will feature a primer on metadata and speakers from LC, the Federal Geographic Data Committee, the US Bureau of the Census, the National Biological Information Infrastructure, Smithsonian Institution Libraries, and Intelink.

Digital library resources
The FADC and the NDL competition are only two of many large-scale digital library projects around the nation and the world. The following Web sites provide information about other projects, digital library research, and ongoing standards development:

D-lib magazine: http://www.dlib.org/
Digital Library Organizations, Institutions & Commercial Companies: http://sunsite.berkeley.edu/
National Initiative for a Networked Cultural Heritage: http://www-ninch.cni.org/
NSF Digital Library Project: http://www.informedia.cs.cmu.edu/

Using standard digital formats
The NDL provides access to an array of digital resources. Visit Background Papers and Technical Information at
OCLC News

OCLC Stops Supporting Passport for DOS
As of January 1, 1998, OCLC will no longer support Passport for DOS software. This means that OCLC will neither enhance or reissue patches or fixes for this software nor will OCLC’s User and Network Support answer Passport for DOS-related questions after that date.

Although OCLC will not block access to any services currently accessed via Passport for DOS, it will not update the software to take advantage of future changes to OCLC systems. Passport for DOS could therefore become incompatible anytime after the January deadline. OCLC Passport for Windows software is now the recommended terminal emulation product for use with non-Web OCLC online systems.

For more information about Passport for Windows, call FEDLINK or visit the OCLC Passport Web page at http://www.oclc.org/oclc/passport/passport.htm.

Academic Press Joins OCLC Electronic Collections Online
One of the world's largest publishers of scientific information, Academic Press will broaden its online delivery by partnering with the OCLC FirstSearch Electronic Collections Online service. With the addition of the Academic Press Collection, Electronic Collections Online will offer users more than 1,100 electronic journals from 23 publishers.

Licensed libraries may use Electronic Collections Online as a gateway to the Academic Press International Digi-
tal Electronic Access Library (IDEAL) for access to all 175 Academic Press scientific research journals.

“We are very pleased to partner with OCLC, a well-respected library service organization,” said Pieter Bolman, president of Academic Press. “Electronic Collections Online will be the first gateway service to IDEAL, providing access to all of its current and future features through the Electronic Collections Online comprehensive search interface.”

Through Electronic Collections Online, libraries can search across hundreds of journals from many different publishers, using a single interface and access point. To meet the needs of its diverse library community, OCLC is aggregating a broad collection of titles in many different subject areas, including life and physical science, social science, and the humanities. In 1998, OCLC will also begin linking 65 additional databases from the OCLC FirstSearch service with the full-text journals available on Electronic Collections Online to create a fully integrated system for library users.

“Achieving Press has been on the forefront of the transition to electronic journals through their consortia licensing model,” said K. Wayne Smith, OCLC president and chief executive officer. “Many OCLC member libraries have licensed the Academic Press journals, and OCLC is pleased now to be able to provide integrated access to them along with the journals from the many other publishers now participating in Electronic Collections Online.”

Academic Press will participate in the Electronic Collections Online archiving service, which will provide access in perpetuity to licensed material. “By maintaining archived issues of journals as well as current materials, Electronic Collections Online helps Academic Press fulfill its archiving responsibilities and becomes part of the Academic Press disaster-recovery strategy,” said Bolman.

OCLC has made a commitment to create an electronic archive of all journals available through Electronic Collections Online, assuring that libraries have perpetual access to the electronic versions of the journals libraries subscribe to, freeing them from the burden of storing print copies.

Electronic Collections Online combines the cost benefits associated with remote data access with the advantages of local collection management, reducing information costs for libraries by centralizing storage and access, and enabling libraries to share the cost of loading, archiving, and providing access to their electronic journal collections. In addition, Electronic Collections Online offers libraries a number of value-added features, including print-quality article representation, usage statistics, technology migration, and technical and product support. More information about Electronic Collections Online, including a list of available journals, can be found at http://www.oclc.org/oclc/menu/eco.htm.


Making the Transition to ILL ME for Windows

OCLC realizes the challenges of switching ILL operations to ILL ME for Windows and plans to make the transition as easy as possible. For questions about the differences and functionality of the program, OCLC has created an FAQ at http://www.oclc.org/oclc/faqs/illme/index.htm that may address many of these questions. For issues not covered in the FAQ, please call FEDLINK, or OCLC’s User and Network Support at 1-800-848-5800. You can even e-mail your questions to support@oclc.org. These support professionals are available to answer your questions in a timely manner.
OCLC TCP/IP Consultations at ALA Mid-Winter
Access Services staff will be available by appointment at ALA Mid-Winter to consult with users about the new TCP/IP access options. If you wish to discuss Dedicated TCP/IP, Dial TCP/IP, or any access related issues, please contact Bill Carney at OCLC to request one of the following appointment times: January 10 from 7:30 a.m. to 9:00 a.m.; January 11 from 10:00 a.m. to 12:00 p.m.; or January 12 from 8:00 a.m. to 10:00 a.m. Appointment times will be scheduled on a first-come-first-serve basis, in 20 minute sessions. Carney will hold all in the OCLC Red Suite at the New Orleans Hilton Riverside.

Using dial access to the Internet?
You can save money on OCLC communications costs!
If you already use a dial access Internet Service Provider (ISP) for your Internet connections (World Wide Web, telnet, ftp, etc.), or if you dial into your agency or base Internet access via a modem, you can save on your OCLC access costs.
If you have telnet capability, Passport for Windows provides access to OCLC services at the Internet price without the annual authorization fee. Hourly rates for OCLC may be as low as $3.60 per hour access charge.

Unfortunately, this access method may not work for those who use services such as America On Line (AOL) unless they provide basic telnet access.

To use a dial access Internet provider to access OCLC services via telnet:
1. Access your regular dial access ISP.
2. Once connected to your ISP, use the TCP/IP protocol on your work station as though you had a dedicated TCP/IP line:
   - Access Passport for Windows in the regular manner.
   - If you have an Internet session already created for the service you wish to use, open that session.
   - If you need to create an Internet session for a service, create that session for that service.
3. Use Passport for Windows to perform the functions of the OCLC service you have reached.
To disconnect from ISP Access:
1. Log off from all OCLC systems that you are connected to through your ISP.
2. If the message box that tells your connection to OCLC is still open, click on the Disconnect button and follow any prompts that display.
3. Once certain that you are disconnected from all OCLC services, you may disconnect from your ISP.

If you do not have Internet access or are already paying for an ISP using the standard dial access to OCLC, consider switching to another method of access. The new dial-access TCP/IP method will save you yearly access fees and a few cents per hour for access costs.

If you are concerned about losing access or are afraid to count solely upon the new access methods for OCLC services, remember that obtaining access either by Internet or by dial access TCP/IP does not automatically cancel your standard dial-access account.

For more information concerning which access method would be best for your library, please call FEDLINK Network Operations at (202) 707-4848.
FEDLINK Mission Statement Update

The FEDLINK Advisory Council (FAC) has completed the new FEDLINK Mission Statement and both the FLICC Executive Board (FEB) and the full FLICC membership have formally approved the following:
To serve federal libraries and information centers as their purchasing, resource-sharing and training consortium.

If you would like to comment on or have questions about the new mission statement or the FEDLINK business plan, please contact us by letter, phone, fax, email (flicc@loc.gov), or visit the FLICC/FEDLINK Web site at http://www.loc.gov/flicc/.

Mark Your Calendar

FEDLINK Offers Discounts for the
1998 Computers in Libraries Conference
March 2-4
Arlington, Virginia

FEDLINK has arranged a network discount with Information Today, Inc. for the 1998 Computers in Libraries Conference.
The special rate of $109 for this three-day event will be available to FEDLINK members who register via FEDLINK and pay through their FEDLINK training account (FT).

Travel and per diem, if involved, will not be covered by the FT account. Instructions and registration forms will be available in January. For further information email Elinda Harris at fliccfno@loc.gov

Editorial Staff

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FLICC/FEDLINK:
FLICC was established in 1965 (as the Federal Library Committee) by the Library of Congress and the Bureau of the Budget for the purpose of concentrating the intellectual resources of the federal library and related information community. FLICC’s goals are: To achieve better utilization of library and information center resources and facilities; to provide more effective planning development, and operation of federal libraries and information centers; to promote an optimum exchange of experience, skill, and resources; to promote more effective service to the nation at large; and to foster relevant educational opportunities.