

PDIG Forum 2018

FRONTLINE SERVICES: Responding to a changing landscape

Belinda M L Sua, UNSW Library, Client Services Team Leader



**Online Training Program (OTP):
Learning can be interesting and fun.**

It is just like the real thing for staff

Background and rationale

UNSW Sydney Library's Client Services Unit (CSU) has had a successful intern Program since 2012.



OTP Objectives

ExLibris
Alma

Alma June 2018 Release

The Galaxy

June 1995 – American space shuttle docks with Russian Mir space station

User Name:

Password:

Login

To review system status, maintenance announcements <http://status.exlibrisgroup.com/>

To design an OTP that:

- makes learning content more accessible
- is adaptable to various learning styles
- makes learning more interesting, interactive and efficient
- can be easily modified as required

The OTP Project Team

| Stakeholder | Role |
|---|---|
| Shaun O'Dwyer, CSU Associate Director | - Project Sponsor |
| Belinda Sua, CSU Team Leader | - Project and Business Owner - Provide resources and support |
| CSU interns and returning staff | - Benefit from the implemented training changes |
| Resource | Role |
| Belinda Sua, CSU Team Leader | - Assistance when required |
| Mandy Kalan, Project Coordinator | - Assistance when required - Training/resource/style guide - Produce requirements document if required - Testing and implementation - Communication to CSU and UNSW Library staff |
| Alice Robinson, CSU Team Member Belinda Lancey, CSU Team Member Emma Gerts, CSU Team Member | - Compiling of content - Research of online system to be used - Producing online training content - Voice over |
| Jane Campbell, CSU Team Member | - Compiling of content - Research of online system to be used - Producing online training content |
| Jessica Deane (JD), CSU Team Coordinator | - Research of online system to be used - Assistance when required |
| UNSW IT 3S | - Advise on online training solutions |
| Focus Group CSU Team Members and Interns | - Testing and providing feedback |

Once the project team was set up, the following criteria were developed in order to assess various software programs for their suitability in relation to this project:

- Ability to host content
- Software interface and navigation
- Screen capture capability
- Potential for quiz functionality
- Ease of updating content
- Aesthetic
- Software cost and licensing restrictions

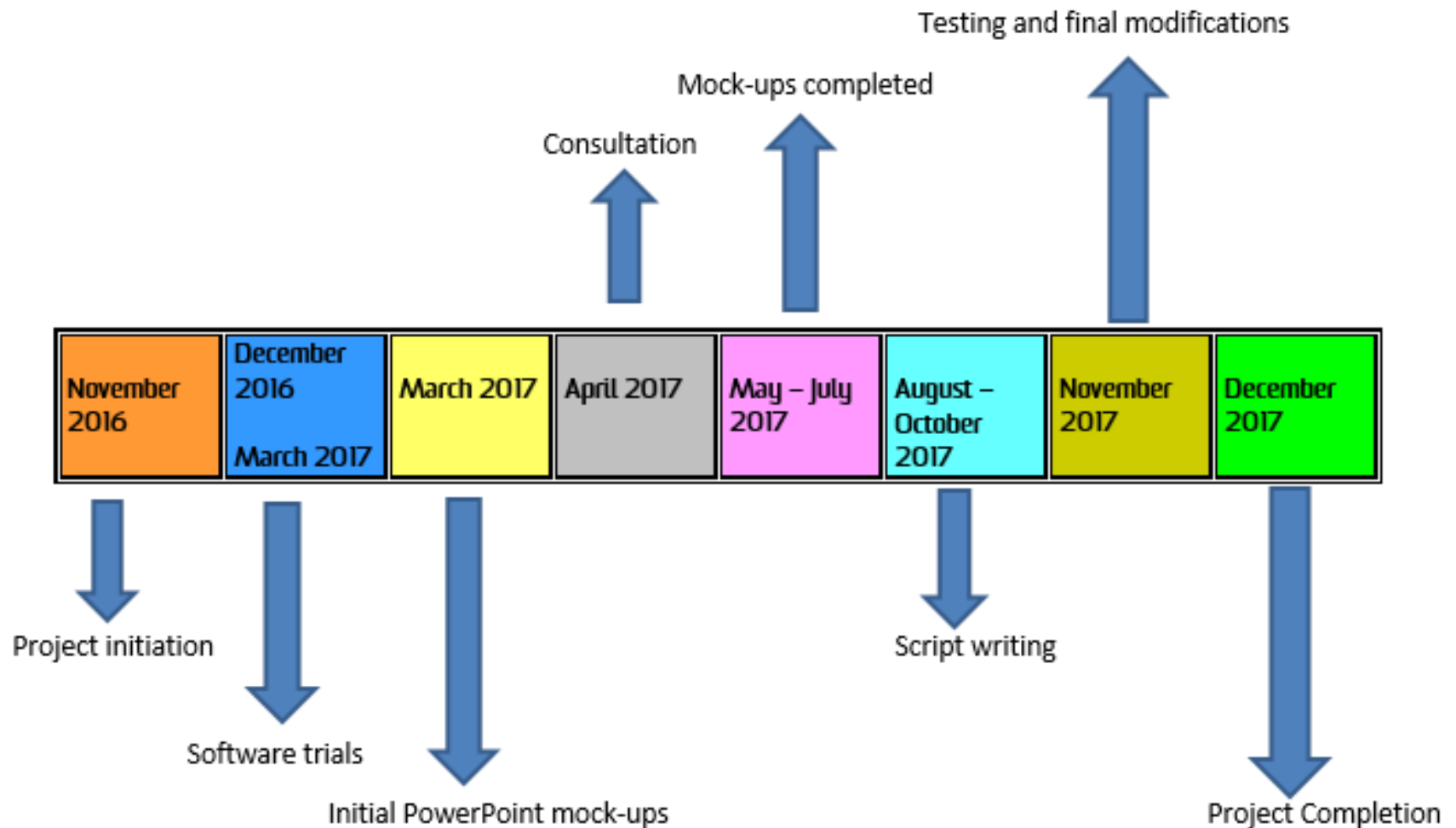
Software trials



PowerPoint

Storyline 360

OTP Timeline



OTP Focus Group

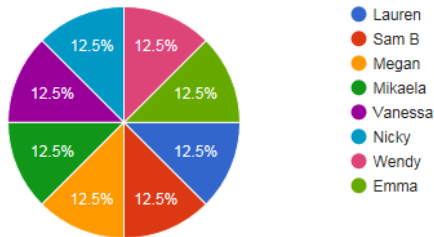
OTP Online Survey

8 responses

[Publish analytics](#)

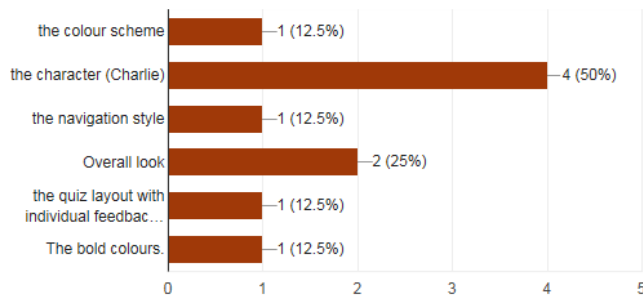
Your name:

8 responses



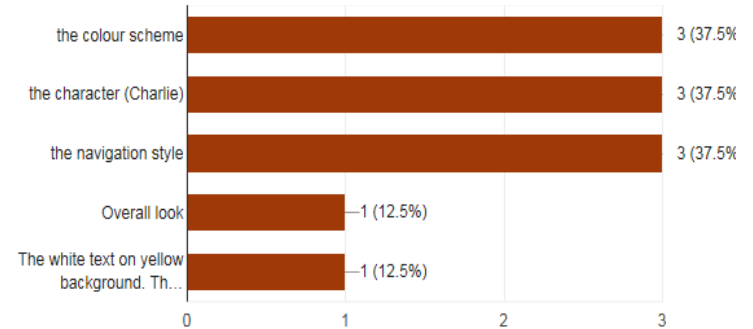
What did you like about Mock up A?

8 responses



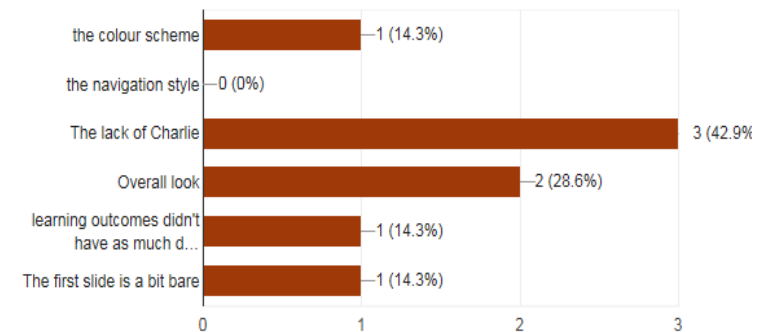
What did you dislike about Mock up A?

8 responses



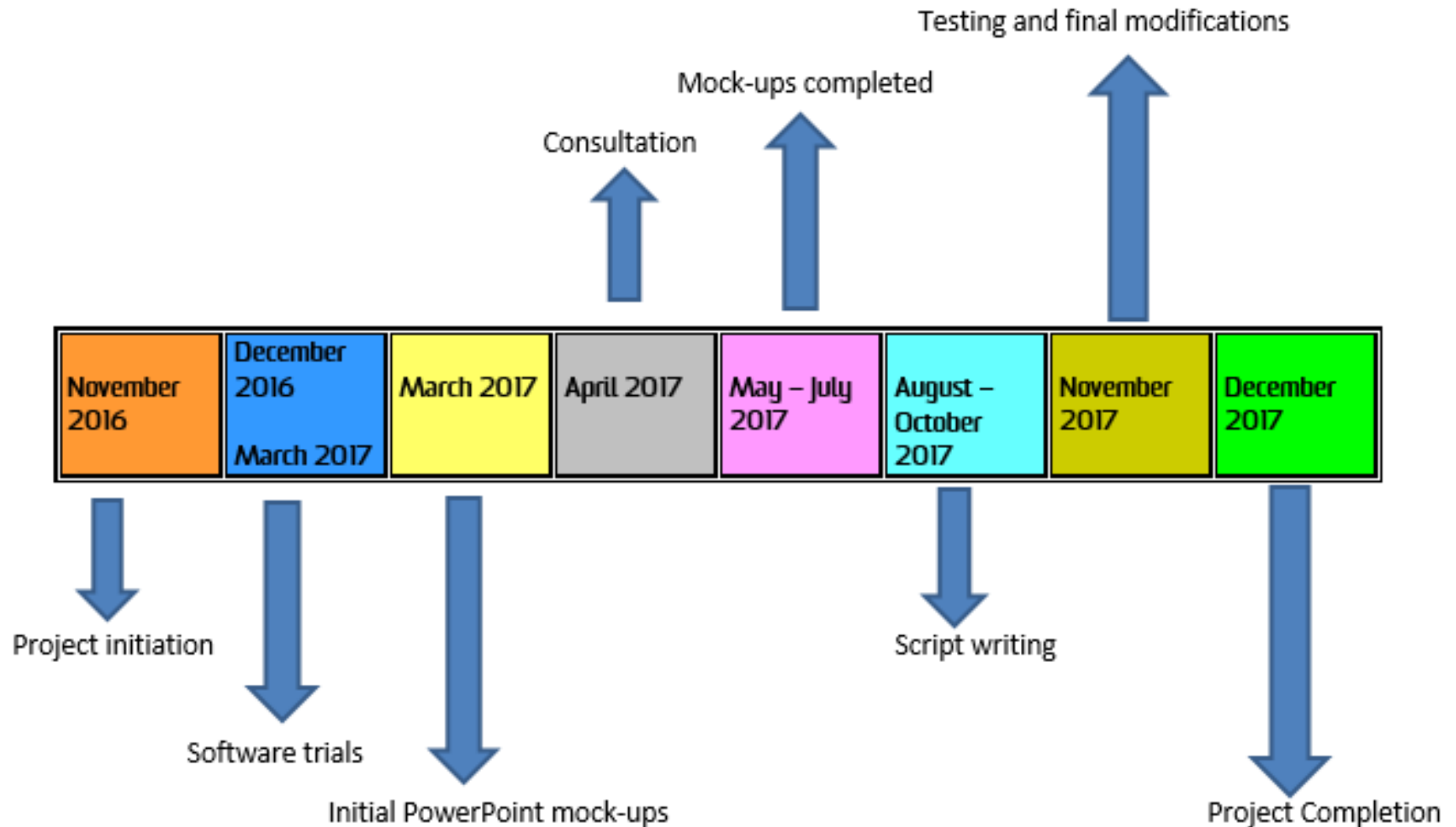
What did you dislike about Mock up B?

7 responses

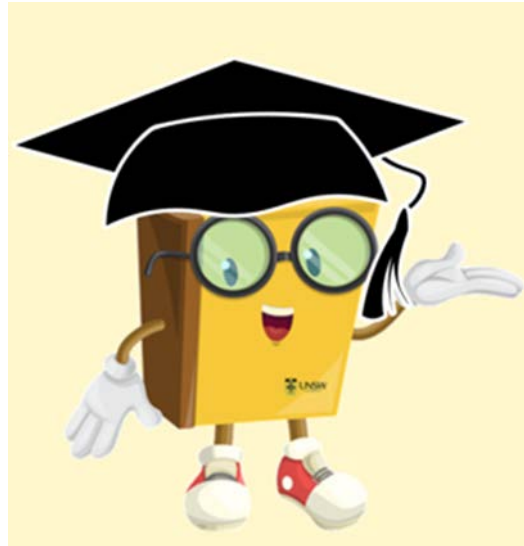


[OTP Online Survey](#)

OTP Timeline



OTP Demo





UNSW Library

Client Services Team – Alma Training (CAT)

Alma Library Management System



Welcome to Client Services Alma training

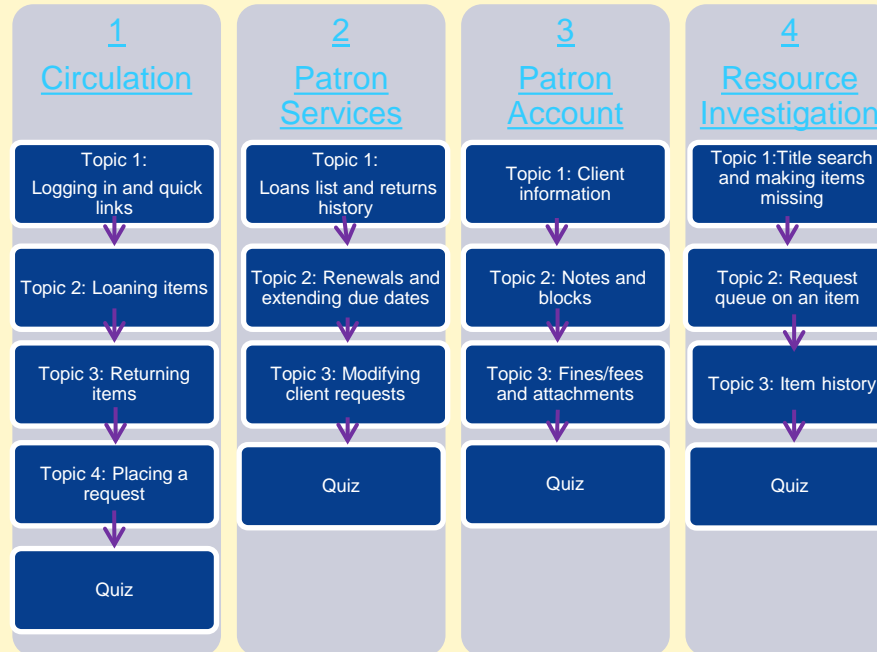
Completing this training will familiarise you with the basic tasks of UNSW's library management system which is called Alma.

This training is designed to be completed flexibly, whenever you are assigned time on the roster.



Main Menu

Click on the menu to jump to a specific section of the program



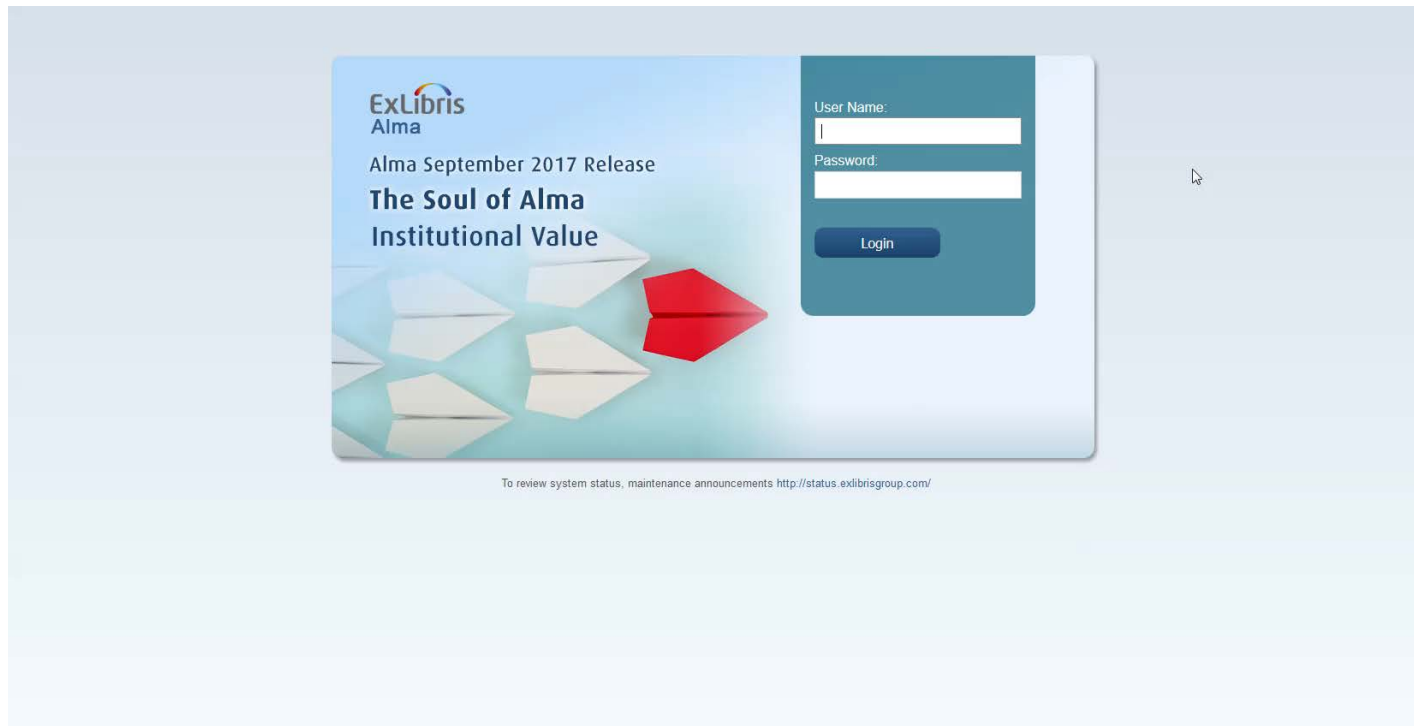
Module 1 – Circulation

Learning Outcomes

During the course of this module, you'll learn how to:

- log in to Alma and add quick links
- loan items
- return items
- place a request on an item

Circulation - Topic 1 - Video: Logging in and adding quick links



Circulation - Topic 1 - Alma practice: Logging in and adding quick links

Now that you've watched the demonstration video, the next step is to put these instructions into practice using the Alma sandbox, which is a test account. Click [here](#) to access the sandbox, then log in using your zID number and password. Once logged in, you can practice the following steps:

- 1) Setting your location to Main Library
- 2) Setting up the following quick links from the Fulfillment tab on the Main Menu Navigation Bar:
 - Manage Patron Services
 - Return Items
 - Scan In Items
 - Expired Hold Shelf
 - Active Hold Shelf

Circulation - Topic 2 - Video: Loaning items

The screenshot displays the Alma library management system interface for user Gerts Emma on Friday, September 29, 2017. The top navigation bar includes links for Manage Patron Services, Return Items, Pick From Shelf, Scan In Items, Expired Hold Shelf, and Active Hold Shelf. The main content area is divided into several sections:

- Welcome, Gerts Emma, Friday, September 29, 2017**
- Recent Pages**: Scan In Items (Fulfillment), Manage Patron Services (Fulfillment), Active Hold Shelf (Fulfillment), Return Items (Fulfillment), Expired Hold Shelf (Fulfillment).
- Tasks**: 4 Other Requests, 1465 Reading Lists.
- Notifications**: 07/01/2013 Welcome to Alma (09/01/2014).
- Primo Dashboard**: Search anything... (Search bar), LAST PUBLISHING JOB DETAILS (Starting Time: 29/09/2017 14:01:32 AEST, Status: Completed Successfully, Type: Incremental).
- CSU - Missing book check for 1, 2 and 13 weeks**: Open in a new window, DQS Missing Books Check.

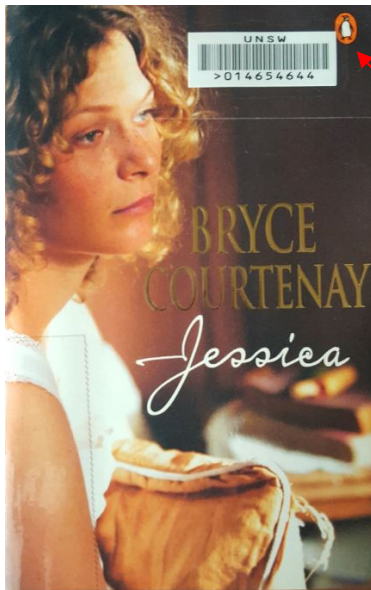
The CSU - Missing book check section displays two tables:

| Location Name | Title | Barcode | Permanent Call Number | Item Missing Since: | Time item has been Missing | Claimed Returned? | Fulfillment Note |
|------------------|----------------------------------|------------|-----------------------|---------------------|----------------------------|-------------------|------------------|
| Law Library (LX) | Contract : cases and materials / | >014873567 | L/ KN10/H3/13 J | 30/06/2017 | 3 months | | |

| Location Name | Title | Barcode | Permanent Call Number | Item Missing Since: | Time item has been Missing | Claimed Returned? | Fulfillment Note |
|---------------|-------|---------|-----------------------|---------------------|----------------------------|-------------------|------------------|
|---------------|-------|---------|-----------------------|---------------------|----------------------------|-------------------|------------------|

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Circulation - Topic 2 - Alma practice: Loaning items



To practice loaning an item in the [Alma Sandbox](#), use your zID number as the client number in the Manage Patron Services field and loan Bryce Courtenay's book, *Jessica*, by using the barcode number on the picture to the left.

Circulation – Quiz – Question 1

Question 1:

Which of the following is NOT a recommended Alma quick link?

Pick From Shelf

Monitor Requests and Item processes

Return Items

Expired Hold Shelf



Circulation – Quiz – Question 2

Question 2:

Once you are logged into Alma, what is the first step you need to complete in order to loan an item?

Scan the client's card

Scan the item to be borrowed

Desensitise the item

Select Manage patron services from the menu

Circulation – Quiz – Question 3

Question 3:

A client returns a High Use Collection (HUC) item to the Help Zone at the Law Library. The correct location to choose in ALMA is, currently at:

High Use Collection - High Use Collection

General (General Services) – General (General Services)

High Use Collection - High Use Collection
LAWR

Law Library – Law Library

Circulation – Quiz – Question 4

Question 4:

When placing a manual request in Alma, the request type that should be selected is:

Booking request

Patron physical item request

Patron digitization request

Staff digitization request

**Congratulations,
You've completed Module 1.**



What we've achieved...and feedback...



I found the Alma training useful for understanding the main functions of Alma...Running the training videos concurrently with Alma Sandbox was particularly useful because it gave me a chance to practice using Alma and being able to go through the motions made it easier to remember the processes better. All in all, I found the Alma training helped the most with getting a feel for the layout and design of Alma, knowing where things are, and how to input data. And this made it easier to understand when others would show me how to do things like projects and loans at the Help Zone and so on.

Genevieve Freeman, Client Services Intern

Jessie Yao, Client Services Intern

Acknowledgement

Shaun O'Dwyer – Project Sponsor
Associate Director, Client Services

Jane Campbell - Program Developer
Team Member, Client Services

Alice Robinson, Belinda Lancey and Emma Gerts - Voice Over
Team Member, Client Services

Jessica Deane (JD), Mandy Kalan
Client Services Team Coordinator

THANK YOU

