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

It is just like the real thing for staff
UNSW Sydney Library’s Client Services Unit (CSU) has had a successful intern Program since 2012.
OTP Objectives

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
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

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Role</th>
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<tbody>
<tr>
<td>Shaun O'Dwyer, CSU Associate Director</td>
<td>Project Sponsor</td>
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<tr>
<td>Belinda Sua, CSU Team Leader</td>
<td>Project and Business Owner</td>
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<td></td>
<td>Provide resources and support</td>
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<td>CSU interns and returning staff</td>
<td>Benefit from the implemented training changes</td>
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<td>Belinda Sua, CSU Team Leader</td>
<td>Assistance when required</td>
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<td>Mandy Kalan, Project Coordinator</td>
<td>Assistance when required</td>
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<td></td>
<td>Training/resource/style guide</td>
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<td>Produce requirements document if required</td>
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<td>Testing and implementation</td>
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<td>Alice Robinson, CSU Team Member</td>
<td>Communication to CSU and UNSW Library staff</td>
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<td>Belinda Lancey, CSU Team Member</td>
<td>Compiling of content</td>
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<td>Emma Gerts, CSU Team Member</td>
<td>Research of online system to be used</td>
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<td>Producing online training content</td>
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<td>Jane Campbell, CSU Team Member</td>
<td>Voice over</td>
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<tr>
<td>Jessica Deane (JD), CSU Team Coordinator</td>
<td>Research of online system to be used</td>
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<td>Producing online training content</td>
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<td>UNSW IT 35</td>
<td>Compiling of content</td>
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<td>Focus Group</td>
<td>Research of online system to be used</td>
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<td>CSU Team Members and Interns</td>
<td>Voice over</td>
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<td>Assistance when required</td>
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<td>Advise on online training solutions</td>
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<td>Testing and providing feedback</td>
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Software trials

Cp

C

Storyline 360

PowerPoint
OTP Timeline

November 2016
December 2016
March 2017
March 2017
April 2017
May - July 2017
August - October 2017
November 2017
December 2017

Project initiation
Software trials
Initial PowerPoint mock-ups
Mock-ups completed
Consultation
Testing and final modifications
Script writing
Project Completion
OTP Focus Group

OTP Online Survey

What did you dislike about Mock up A?
8 responses

- The colour scheme: 3 (37.5%)
- The character (Charlie): 3 (37.5%)
- The navigation style: 3 (37.5%)
- Overall look: 1 (12.5%)
- The white text on yellow background: 1 (12.5%)

What did you dislike about Mock up B?
7 responses

- The colour scheme: 1 (14.3%)
- The navigation style: 0 (0%)
- The lack of Charlie: 3 (42.9%)
- Overall look: 2 (28.6%)
- Learning outcomes didn't have as much detail: 1 (14.3%)
- The first slide is a bit bare: 1 (14.3%)

Your name:
8 responses
OTP Timeline

- November 2016
- December 2016
- March 2017
- April 2017
- May – July 2017
- August – October 2017
- November 2017
- December 2017

- Project initiation
- Software trials
- Initial PowerPoint mock-ups
- Script writing
- Project Completion

Testing and final modifications
Mock-ups completed
Consultation
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

1  Circulation
   - Topic 1: Logging in and quick links
   - Topic 2: Loaning items
   - Topic 3: Returning items
   - Topic 4: Placing a request
   - Quiz

2  Patron Services
   - Topic 1: Loans list and returns history
   - Topic 2: Renewals and extending due dates
   - Topic 3: Modifying client requests
   - Quiz

3  Patron Account
   - Topic 1: Client information
   - Topic 2: Notes and blocks
   - Topic 3: Fines/fees and attachments
   - Quiz

4  Resource Investigation
   - Topic 1: Title search and making items missing
   - Topic 2: Request queue on an item
   - Topic 3: Item history
   - Quiz

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
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
- Return Items
- Monitor Requests and Item processes
- Expired Hold Shelf
Well done, correct answer
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 LAW
- Law Library – Law Library
Question 4:

When placing a manual request in Alma, the request type that should be selected is:
Congratulations,
You’ve completed Module 1.
What we’ve achieved...and feedback...

Genevieve Freeman, Client Services Intern

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.

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