

## **Testing for Usability in the Design of a New Information Gateway**

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Seeking to understand user's needs, assumptions, and on-line behavior was critical in the design of The University of Arizona's new Information Gateway system. Focus groups helped direct the initial design and then usability studies shaped the prototypes and the end product. We will discuss both the methodology and the results of these studies.

## **Access Action Planning Team**

**Christine Kollen, Joanne Martinez, Holly Penix, Patricia Promis, Gene Spesard**

Projects proposed by the Access Action Planning Team, with comments received at the library open house, May 29, 1996.

- Project 1: KNOWNET, with comments
- Project 2: CATNET, with comments
- Project 3: COLLABNET, with comments
- Project 4: OPTI-NET, with comments, **HANDOFF** to UST, LIST and the World Wide Web Coordinating Group
- Project 5: CCPNET, with comments, **CANCELLED** (Initial phase to load the CCP print databases - handoff to LIST and RAMSC)
- General Comments from the Open House

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## **Access APT Project 1: KNOWNET**

**GOAL :** To provide users with a subject organized, web-based tool for accessing campus knowledge bases and selected internet resources.

**CHARGE :**

- **PURPOSE:**

To provide users with web-based tools, organized by disciplinary and interdisciplinary fields, for addressing campus knowledge bases and selected internet resources. The ultimate outcome is that customers will be easily able to access campus generated and other quality Internet resources from a single starting point.

- **PROBLEM STATEMENT:**

Current practice has been organizing web pages by department, which both leaves some disciplines uncovered and splinters resources for others among several web pages. Furthermore, there are knowledge bases being developed within departments that may be of benefit to a larger audience, but are only available within individual departments. There is no mechanism in place for selectors to obtain the training and support necessary for integrating selection and evaluation of Internet resources into their regular IRD/P activities.

- **PARAMETERS:**

This is a one year project consisting of three components: campus-wide environmental scan, creation of the discipline-oriented framework, and training for and coordination of discipline focused web page development.

- **RESOURCES:**

- A. People/Teams

- Web coordinating group
    - CCIT
    - UC Irvine's Virtual Reference desk as a possible model
    - LIST --Subject selectors for knowledge of departmental activities and additional contact individuals

- B. Budget

Temporary professional salaries:	<b>SUBTOTAL</b>	\$ 0.00
Temporary staff salaries:	<b>SUBTOTAL</b>	\$ 0.00
Student wages:	<b>SUBTOTAL</b>	\$495.00
5 hr/wk x 10 wks x \$4.75/hr = \$237.50 for July 1 - Dec. 31, 1996 (inc. \$.50/hr min. wage increase)		
5 hr/wk x 10 wks x \$5.15/hr = \$257.50 for Jan. 1 - June 30, 1997 (inc. \$.90 /hr min. wage increase)		
Operations:	<b>SUBTOTAL</b>	\$625.00
Office supplies, postage, photocopy services, etc.:	\$125	
Vendor Cost (non-library/campus) Services:	\$ 0	
Miscellaneous:	\$500	
HTML mark-up software, URL updating software		

Equipment:

<b>SUBTOTAL</b>	\$0.00
<b>GRAND TOTAL REQUESTED:</b>	\$1,120

- SUGGESTED APPROACHES:

1. Perform an environmental survey of knowledge bases on campus, existing in any format, and pass information to selectors for inclusion in their web pages, and/or to Access Project "Cat/Net" for cataloging. This survey should also include an inquiry into the structure of knowledge on campus (disciplinary and interdisciplinary fields studied).
2. Design a discipline-oriented framework, which mirrors campus' structure of knowledge which will be incorporated into existing Library web page and from which selectors' subject pages will be accessed.
3. Coordinate, encourage, train, and support the development of discipline-oriented web pages that will incorporate resources identified in the environmental survey as well as selected Internet resources. Foster an environment in which, and develop a mechanism by which, continued maintenance is valued and performed.

- PRODUCTS:

- A. Methodology for environmental scan
- B. Report results of environmental scan.
- C. Guidelines for creation of discipline-oriented web pages.
- D. Training - Module Devised - Plan implemented
- E. A discipline oriented framework for accessing Internet resources

- CRITERIA FOR MEMBERSHIP:

The Team will be composed of 6 individuals who can collectively contribute the following knowledge, skills, abilities, and qualities:

- Big picture thinking
- Detail-oriented thinking
- Knowledge of HTML and web page creation
- Experience in locating and evaluating web resources
- Strong interest in training

Stakeholder Teams: LIST, FA/H, SET, SST, UST, RAMSC

- REPORTING TIME FRAME/STRUCTURE:

The KnowNet Project Team will meet with the Management Review Team once a month/or more frequently, if needed, to report on progress and consult on issues. Attendance to this meeting with MRT is expected. Every six weeks, the Project Team will submit a formal report that will be included in the reports to the Library. Attendance at Library Reports is strongly encouraged.

- **TIMELINE:**

- A. Methodology for scan by Sept. 1, 1996
- B. Report results of scan by Dec. 15, 1996
- C. Guidelines for creation of discipline-oriented web pages by Oct. 1, 1996
- D. Training module devised by Dec. 15, 1996
- E. Training implemented Jan - March, 1997
- F. Framework by Jan. 30, 1997
- G. Web pages complete by June 30, 1997

a:\knownet.doc DRAFT 6/13/96

## **Comments on Access APT Project 1: KNOWNET**

"Like this project! Hope we can be flexible on time-frame for 100% home page development." BT

"Will definitely help with our focus and move us forward with electronic expertise."

"We need lots of work on web pages to make them user-friendly and well organized."

"Great idea - much need for coordination of library web pages and an organizing of all information centers/databases on campus."

"This is good. Takes a lot of training and individual librarian time to develop."

"What about focusing on just one of the "charge"? (Perhaps #2 would happen naturally in some places anyway?)"

"I'd like to see each IS team do this instead of a project." "I agree."

"Is the library really prepared to wrestle the entire campus into alignment in order to accomplish this goal?"

"This is good for what it covers. However, I am concerned that it is limited to only those resources that are already internet accessible. We need to focus also on building new access to other knowledge bases without existing Internet or WWW access. These could include data/numeric files, etc."

"Next logical step in building on the Library's home page; good project."

University of Arizona Libraries  
*Access Action Plan - 1996-97*

# CATNET PROJECT

## CHARGE

### I. Local Guidelines and Procedures

#### A. Selection of Internet Resources to be cataloged

**REQUEST FORM to have Internet Resource cataloged**

**B. Internet Resources Cataloging Procedures *See also:* Deriving copy from OCLC NetFirst Catalog**

### II. Background - General

**A. UA Policy on Selecting and Acquiring Electronic Products (6/30/96)**

**B. Collection Development model (InterCat msg., 7/95)**

**C. Why subject headings?**

- **InterCat-L msg., 8/95**
- **LC Subject Headings as Subject Terminology in a Virtual Library: The INFOMINE Example (Steve Mitchell, UC-Santa Barbara)**

**D. OCLC Research Projects**

**1. InterCat Homepage *Results of OCLC's Survey of InterCat Project Participants***

**2. NetFirst catalog information ~ NetFirst Homepage ~ NetFirst Collection Development Policy *Connect to OCLC FirstSearch - includes NetFirst database (Requires FirstSearch authorization and password.)***

**3. PURLS (Persistent Uniform Resource Locators) *Connect to OCLC's PURL Homepage***

#### **4. SiteSearch Homepage**

### **E. Metadata**

#### **1. Metadata Resources (IFLA)**

#### **2. Metadata: The Foundations of Resource Description (Stuart Weibel, OCLC)**

#### **3. Metadata to describe Information in Digital Libraries**

#### **F. ALCTS Taskforce - Internet Cataloging and Access projects**

#### **G. ALCTS CC:DA Taskforce on Metadata and the Cataloging Rules Dublin Core and the Cataloging Rules - Analysis Project**

#### **H. Digital Library Resources and Projects (NDLF)**

### **III. Resources**

#### **A. Cataloging Internet Resources: A Manual and Practical Guide, 2d ed. 1997 (Nancy Olson)**

#### **B. Guidelines for Use of Field 856 (LC--Rev. 8/97)**

#### **C. Internet Library for Librarians -- Cataloging (formerly Internet Resources for Cataloging (Vianne Sha))**

#### **D. Cataloguing and Indexing of Electronic Resources (IFLA)**

#### **E. Internet Cataloging Resources (Clemson University)**

#### **F. Cataloging: Related Sites**

#### **G. Internet Resources to Inform and Support Cataloguing Functions Lots of stuff here!**

#### **H. Miscellaneous**

##### **1. *Journal of Internet Cataloging***

##### **2. CCQ 22 (3/4) "Electronic Resources: Selection and Bibliographic Control"**

Table of contents, abstracts of articles

##### **3. Bibliographic citations from InterCat Listserv message (5/94)**

##### **4. ARL Directory of Electronic Journals and Newsletters**

##### **5. Committee on Institutional Cooperation (CIC) CIC Electronic Journals Collection**

#### IV. CatNet Team Accomplishments, Meetings, etc.

##### **A. Meeting Minutes**

##### **B. Reports to MRT and the Library**

- **October 1996**
- **November 1996**
- **Brown Bag for Library Staff, Dec. 13, 1996**
- **Summary and notes from Brown bag session**
- **January 1997**
- **March 1997**
- **April 1997**
- **June 1997**
- **Final Report - July 1997**

##### **C. Listserv Survey Responses (9/96)**

- **AutoCat**
- **Summary of Autocat responses**
- **InterCat**
- **Summary of InterCat responses**
- **Web4lib**

##### **D. Electronic Journals and Newspapers - DRAFT web pages**

##### **E. Local Guidelines and Procedures (*See Section I. above*)**

##### **F. Innovative Users Group (Oakland, CA, 3/97)**

- **1. Panel "What's the Connection with WebPac: Library web sites and Catalogs"**  
**moderated by Ann and Laurie.**  
Survey of recent National Efforts in providing access to Internet Resources (**Laurie**)
- **2. Innovative Users Group Report (Ann)**
- **3. Examples of what some III libraries are doing with WebPac (Laurie)**

##### **G. CatNet Database Prototype**

**Information from some local files also available on the t:drive under  
t:\bat\catnet\ or t:\shared\slrp\access\catnet\**

LE 4/29/98

## Access APT Project 3: COLLABNET

**Goal:** To enhance regional information access through consortial cooperation and resource-sharing.

**Charge:**

- Identify one additional team member from each organization in the Tucson Pima Information Consortium *by August 1, 1996*
- Identify potential new member organizations for T.P.I.C., and expand membership to the Consortium *throughout the year*
- Explore, understand, and share information about such issues as copyright, licensing, Telecommunications Decency Act, etc. among Consortial members (both TPIC and AULC) by organizing joint lectures, seminars, workshops, etc. *throughout the year*
- Expand sharing of information resources among Consortia by establishing joint policies, negotiating joint contracts, etc. *by June 30, 1997*

**Outcome:** Users throughout the region will have improved access to information.

**Measures:**

- Baseline = Current = 3 members in T.P.I.C.
- Goal: 5 organizational members in T.P.I.C.
  
- Baseline = Current = 1 event (Paul Evan Peters) sponsored
- Goal: 2 more events for a total of 3 events sponsored
  
- Baseline = Current = 2 resource-sharing agreements
- Goal: 4 more joint agreements for a total of 6 resource sharing agreements

**Budget:**

**I. Internal Resources Needed:**

- |  |                       |
|--|-----------------------|
| 1. Staff time needed (total number of Hours): 3 staff members @ est. 5 hours/week for 50 weeks | 750 hours             |
| 2. Meeting/work space needed   | Standard Meeting Room |

**II. Additional Resources/Funding Requested (Cost Estimates/Requested Amount)**

1. Temporary professional salaries:	\$ 600
2. Temporary staff salaries:	\$ 0
3. Student wages:	\$1237
5 hr/wk x 25 wks x \$4.74/hr = \$593.75 for July 1 - Dec. 31, 1996, inc. \$ .50/hr min. wage increase	
5 hr/wk x 25 wks x \$5.15/hr = \$643.75 for Jan. 1 - June 30, 1997, inc. \$ .90/hr min. wage increase	
4. Operations:	\$ 4050
Office supplies, postage, photocopy servie,etc.:	\$ 250
Vendor Cost (non-library/campus) Services:	\$ 3400 for two conference
Services of vendor will include banquet room, meals for participants. (Cost/est. cost for each even: \$ 1700)	
Miscelleaneous:	\$400
Please specify: Travel within region (AZ, possibly NM)	
5. Equipment:	\$ 0
<b>TOTAL</b>	\$5887
<b>FUNDED BY BAG</b>	\$5887

## Comments on Access APT Project 3: COLLABNET

> Can you identify internal to UAL teams that are stakeholders in this initiative/seems to fall under IRD/P Council charge. Unclear as to what conferences \$4,000.00 is for?  
BT

> Why we don't do this coll. projects with ASU/ANI(NAU) since all of us are academic lib.?

> We've got to do this somehow, if this is the only realistic way, to should be a project.

> Good project. Need to think beyond Tucson-Pima area, though.

> Not this time we have many more important/urgent needs!

> This is a very good idea that should be explored. Problems: What does U of A benefit from this? Will there be a true sharing of resources & costs?

> How will this relate to other resource sharing initiatives w/other state/organizations.

- > Local level (i.e. Tucson & Pima Co) may be too small/limited a resource base for us to benefit as much as we contribute. I like the direction of each charge, though! (perhaps more logical to do a broader version of AULC?)
- > Excellent idea we need to move in this direction since we all now share the same system. We all have related issues we need to work on & understand.
- > I wonder about budget - \$200 to visit in Tucson? Not even sure this is reimbursable - \$4000.00 for a conference is a lot of money - can't come from formal travel funds?
- > I think this is a good idea.
- > This is a good concept - would suggest expansion to AULC level and co-ownership of project with IRD/P Council. Also need to start thinking beyond geographic boundaries - electronic resources/capabilities really make geography irrelevant, need to look at common interests or needs.
- > Really glad to see this project; enjoyed meeting other Tucson librarians at the recent Paul Evan Peters conference.

## **Access APT Project 4: OPTI-NET**

HANDOFF to UST, LIST and the World Wide Web Coordinating Group

**Goal:** To enhance customers' non-mediated use of the Library's information systems and to maximize the use of all resources offered, within current technical limitations.

**Charge:**

- Define the scope of what we call SABIO *by August 1, 1996*
- Gather baseline data at type 2 service points *by October 1, 1996*
- Determine & implement the optimal way to integrate and present the variety of resources available through the library's systems, including CD-ROM, LAN, library catalog, library's web pages, stand-alone systems and associated systems, databases, etc. *by March 31, 1997*
- Devise & implement a mechanism to inform the customers where in the myriad of systems they are currently *by March 31, 1997*
- Complete gathering data on outcome *by May 30, 1997*

**Outcomes:** Fewer reference questions related to confusion about what system to use/what system is being used (40% reduction).

**Measures:**

- Baseline = Current = To be established by team
- Goal = 40% reduction of baseline

**Budget:****Internal Costs**

Estimated no. of staff required for team	5-7 staff @ 5-7 hrs/wk
Estimated time to complete project:	One year
Space requirements:	standard meeting room

**External Costs**

Secretarial support (5hrs/wk @ \$5.00/hr x 25 weeks)	\$ 625
Operations	\$ 200
Photocopy	\$ 50
<b>TOTAL</b>	<b>\$ 875</b>

## **Comments on Access APT Project 4: OPTI-NET**

- > It's about time SABIO was re-defined as its scope is ever- growing and changing.
- > re: Confusion about what system to use, what system they're in. Goal should be that it doesn't matter to the user where they are. It should be transparent to them. What should matter is ease of acquiring the necessary info. -Cheech
- > This would probably have the biggest impact on our current customers.
- > Yes! I agree
- > What data (specific) would you baseline?
- > A very definite need for this, as many (most?) customers are lost. How will this group approach the problem differently? Great idea!

- > This is our future. Excellent project but I'm not sure the time frame is realistic.
- > Yes, SABIO as we now know it is probably just one component in UA library's info package. Linking full-text holdings & variety of databases, indexes, etc. will be crucial too (be sure & not leave it out) I really like this one!
- > Greatly needed by our users - lots of confusion of what's on our systems - There are not reference staff available all the hours the library is open.
- > We need this now badly; but charge is rather broad.
- > Needed!! Good project but is this feasible to finish by May 30, 1997? Maybe too broad.
- > If I had to vote on one project, this would be it.
- > I think this project is critically needed. Benefits the customers upfront... & also benefits the library.
- > Very good plan - this will help move us to getting people more directly to what they need rather than assuming prior knowledge of SABIO component parts.
- > Patrons not understanding where they are searching is one of the most common problems encountered at the reference desk; recent screen re-design has helped but there is still much room to improve.

## **Access APT Project 5: CCPNET**

CANCELLED (Initial phase to load the CCP print databases - handoff to LIST and RAMSC)

**GOAL:** To provide searchable Internet access to part of the collection of photographs by Edward Weston with links from the CCP photographs database.

**CHARGE:**

- Load the CCP photographs database into SABIO *by Dec. 31, 1996*
- Develop a plan to put part of the Edward Weston collection on the Internet *by Sept. 15, 1996*
- Implement plan *by Dec. 31, 1996*
  - Scan selected material
  - Put on WWW

- Integrate Edward Weston Web exhibit with SABIO CCP database via SABIO Web interface (linking records in the SABIO database to images in the E. Weston exhibit).

**OUTCOME:** Customers can search for, view and obtain further information on E. Weston photographs on WWW. CCP knowledge product is model for future integration of other knowledge bases into SABIO. Reduced handling of the CCP print collection.

**MEASURES:**

- Baseline = Current = 0
- Goal = 100% of the E. Weston Web Exhibit is loaded and linked to the CCP databases accessible through the Innopac Web interface.

**BUDGET:**

**Internal Costs**

Estimated number of staff required for project	4-6 @ 4-6 hours/week
Estimated time to complete project	1 year
Space requirements	Std meeting room CCP workarea for scanning

**External Costs**

Secretarial support (student assistant) (5 hours/week @ \$5/hour, 10 weeks)	\$ 250
Student wages for scanning (20 hours/week @ \$5/hour, 20 weeks)	\$2000
Student wages for record linking (10 hours/week @ \$5/hour, 22 weeks)	\$ 1100
Capital - High resolution scanner	\$ 2500
Extra disk space ( 1 RZ28 drive)	\$ 1400
<b>TOTAL</b>	<b>\$ 7250</b>

## **Comments on Access APT Project 5: CCPNET**

Is there a Weston endowment group that could be approached for some of the funding needed? BT

Can this be done? Were the Weston prints given to CCP w/ permission to widely publish them?

If outside funding is possible!

Time line and budget unrealistic. Why need of Fine Arts consultant? CCP Staff knowledge abundant, need technical assist.

Unrealistic. Budget & staff time lines are way off. What needs or goals are addressed by this "solution"? The way this goal is written typifies the misunderstanding of fine art collections - which are **not** "information resources". It's curious that this goal was not discussed at the APT/RAMSC meeting 1 week ago. Where did it come from? How does it attempt to merge the RAMSC's/CCP's goals? (It doesn't)

Good idea; work with what we have available, good use of resources.

Why pilot one that looks like such a good candidate for private financial support? What would be seen by a larger population?

I agree with comment above, but also see this as a good prototype. The material is unique and will make a contribution to general availability of knowledge/info. This would be a lower priority for me.

This is a real exciting project and one that should provide baseline info. for many future projects.

## **Access APT, General Comments**

**Excellent** presentation - easy to follow, very clear, well organized, good use of color, good choices in what parts of your work to share. - Cathy L.

Good idea to include a peek at the charge for each project.

OPTI-NET should be a **major priority!!**

This whole APT must think in **lingo**. Write more clearly please!

Good ideas but I'm worried about staff time & work demands required to implement these ideas. Are the reduced/eliminated work responsibilities clearly identified when a staff member is assigned new team intensive duties.

This team needs to seriously consider the role of "dead trees" in our future. After we run out of juice and our infatuation w/ "on-line" wanes, that's all that's left.

RE #3 look at AzHIN - Arizona Health Information network as a state-wide model for information sharing and access - it's very important to look at the "BIG PICTURE"

Many of your projects still beg the question - **What is Sabio** - I am afraid that the single project focus of the library keeps us from devoting time and thought and planning what our online vision is as a whole, we are on our way to an unwieldy monster.

I'd cut these at number 4 and assign number 5 to RAMSC for fund raising. Others have a broader impact.

I would focus on 1 & 2 only this year. Write in a small team of expert grad students/staff who will help selectors design & implement their Web pages on a schedule - high priority.

Staff training will be needed to access and interpret resources.

Projects 3 & 4 are my favorites