

RSC19

**OCLC RESOURCE SHARING
CONFERENCE**



Insights into the patron experience of resource sharing services

MIA PARTLOW, NC STATE UNIVERSITY LIBRARIES

#OCLCRSC19





25,000 Item Requests
6,000 Document Delivery Requests
21,000 Holds

Email

Text

RIS File

Refworks

Request

Dolly : my life and other unfinished business

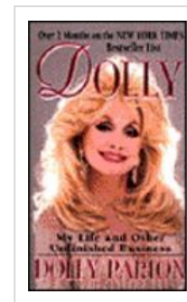
Dolly Parton.

New York : HarperCollins, c1994.

1st ed.

Book

Print



Where to find it

Hunt Library — bookBot

Call Number ML420 .P28 A3 1994

Status Checked Out (Due 05/10/2019, 11:59 PM)

Service Insight Cycle Model

- 8-10 weeks of data collection and analysis around a single question, service, or problem
 - Weeks 1-2: scoping the question and planning for data collection
 - Weeks 3-5: data collection at service points
 - Weeks 6-8+: data analysis -- coding, identifying patterns, brainstorming solutions

Service Insight Cycle Model

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Service Insight Cycle Model

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- Topics arise from data analysis, anecdotal evidence of a problem, or from the libraries' strategic priorities.
- Identifies patterns and potential solutions to problems
- Focusing on patron interactions creates a holistic picture of how the service is experienced by our patrons

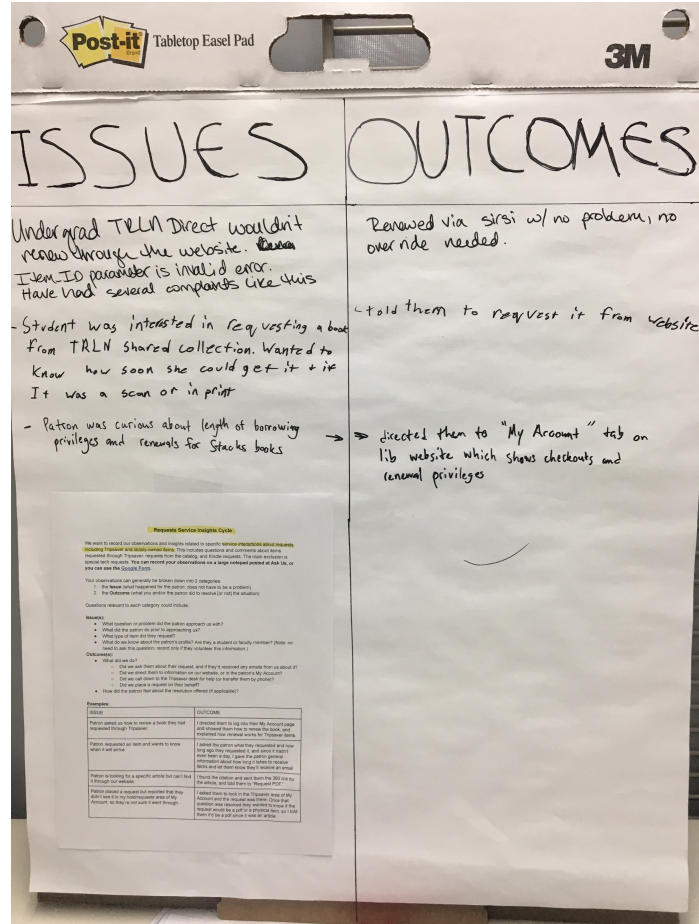
Data Collection

93 chat transcripts

18 desk interactions

4 stakeholder conversations

Empathy mapping



What roadblocks do
users experience with
our request services?

Identified Challenges:

Patron account interface

Request interfaces & processes

Patron Account Interface

Account Interface: Challenges

My Account logged in as MIA PARTLOW

NCSU LIBRARIES

- Checked Out
- Holds/Requests
- Fines
- Account Info

TRIPSAVER

- Digital Deliveries
- Checked Out
- Request an Item
- Request History
- Tripsaver Settings

ROOM RESERVATIONS

- My Reservations
- Reserve a Room

TRIPSAVER: CHECKED OUT

Click on the Transaction number to request a renewal.

| Transaction | Title | Due Date |
|-------------------------|----------|----------|
| 1068190 | Pachinko | 6/2/2019 |

This list only includes items borrowed from other libraries through Tripsaver. **Renew NCSU items here!**

NCSU Libraries Tripsaver
(919) 515-2116 | library_tripsaver@ncsu.edu

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LOGOUT

Request Status: Challenges

Patrons asked about the status of their request in
27% of our interactions

“ Did you get my request?

I just requested this PDF, where is it?

When will I get my item?

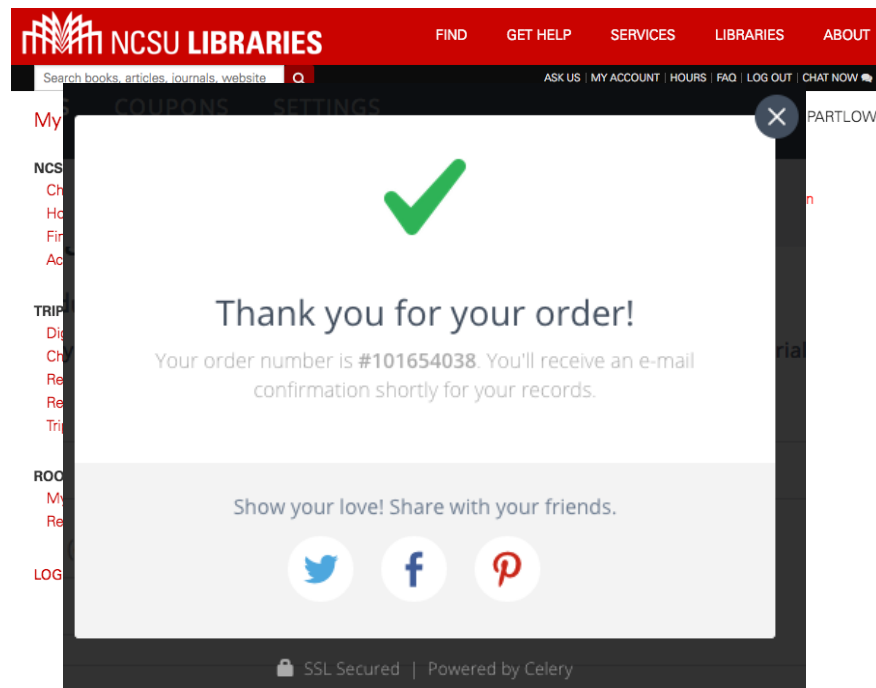
What does this status mean?

Request Status: Identified Solutions

“Request received” notices

Improved on-screen message upon successful request

Shipped notifications



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Account Interface: Item Renewal

Item renewal:

In **5%** of all interactions, patrons asked about renewing an ILL item

“ Can I renew my book?

How do I renew?

My Account logged in as MIA PARTLOW

NCSU LIBRARIES
[Checked Out](#)
[Holds/Requests](#)
[Fines](#)
[Account Info](#)

TRIPSAVER
[Digital Deliveries](#)
[Checked Out](#)
[Request an Item](#)
[Request History](#)
[Tripsaver Settings](#)

ROOM RESERVATIONS
[My Reservations](#)
[Reserve a Room](#)

My Account

[Back to List](#)

TRIPSAVER: TRANSACTION - 1068190
Pachinko
Lee, Min Jin.
Due Date: 6/2/2019

Renewal Allowed: Yes

[Renew Request](#)

IMPORTANT:

- Renewals are not automatic. We must ask the lending library to extend the due date.
- You may keep the book while we wait for the lender to answer our renewal request.
- We will contact you when we receive an answer from the lender.

NCSU Libraries Tripsaver
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[LOGOUT](#)

Item Renewal: Identified Solutions

More obvious interface change when a renewal has been requested.

Communicate renewal policies more clearly in patron account and on renewal screen

Include renewal link in pickup email

My Account logged in as MIA PARTLOW

NCSU LIBRARIES
[Checked Out](#)
[Holds/Requests](#)
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[Account Info](#)

TRIPSAVER
[Digital Deliveries](#)
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[Request an Item](#)
[Request History](#)
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ROOM RESERVATIONS
[My Reservations](#)
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[Back to List](#)

TRIPSAVER: TRANSACTION - 1068190
Pachinko
Lee, Min Jin.
Due Date: 6/2/2019

Renewal Allowed: Yes

[Renew Request](#)
You can only renew this item between the dates of 5/18/2019 and 6/8/2019

IMPORTANT:

- Renewals are not automatic. We must ask the lending library to extend the due date.
- You may keep the book while we wait for the lender to answer our renewal request.
- We will contact you when we receive an answer from the lender.

NCSU Libraries Tripsaver
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The Request Process

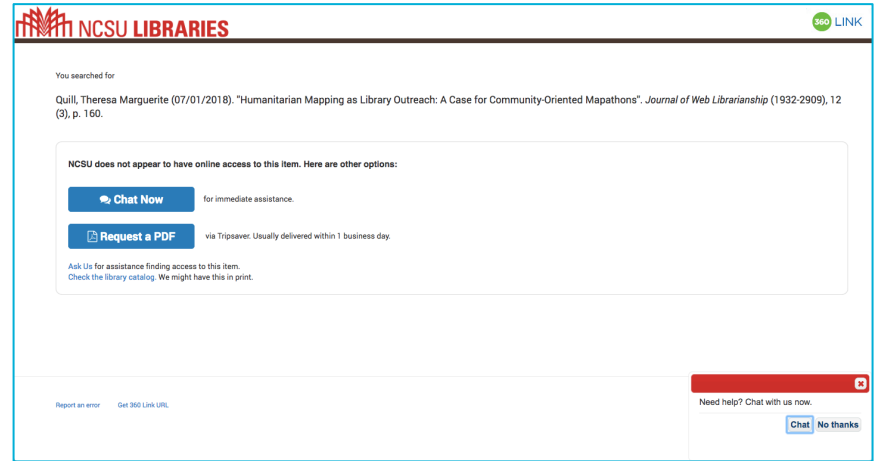
Request Process: Challenges

Many users do not understand the request button

“ If I request a pdf how do I pick it up?

How do I provide my email?

It says you don't have access, can you help me?

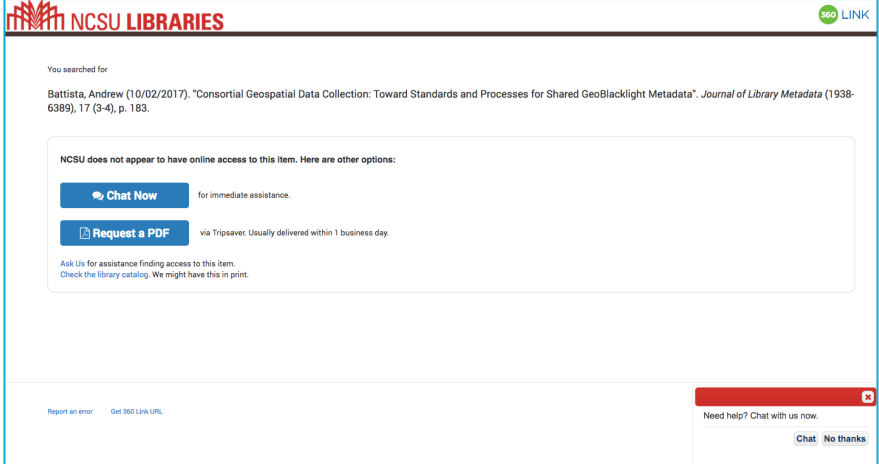


Request Process: Challenges

Mental Models for E-book platforms are being applied to article requests

Belief that a separate login will be required to view the PDF.

During the profile setup, we ask for a pickup location, so patrons ask “will I get the PDF by email or will I have to pick it up?”

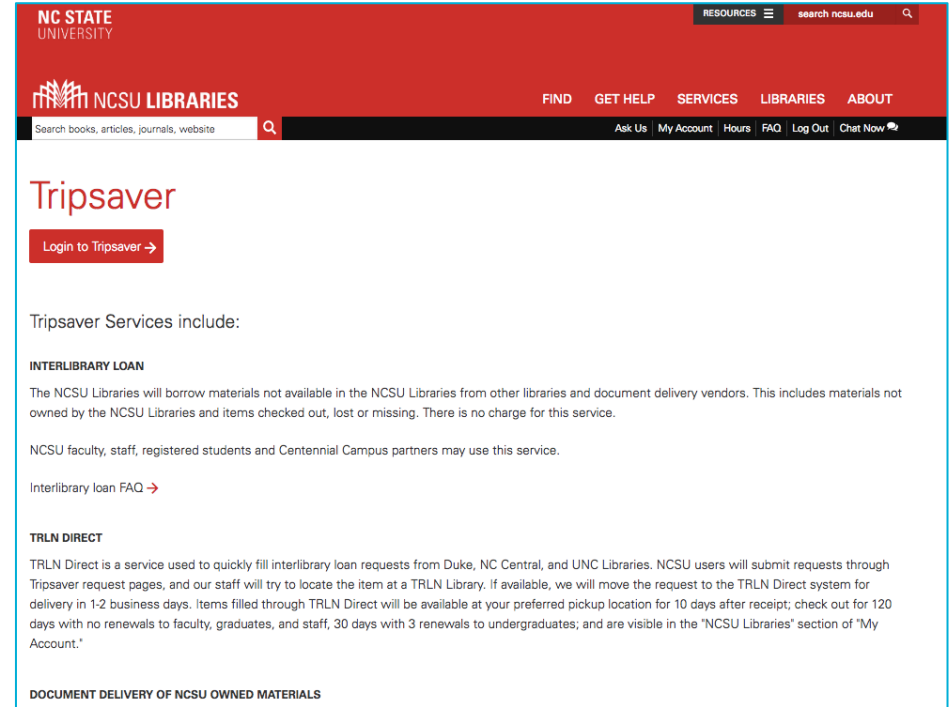


The screenshot shows the NCSU Libraries website interface. At the top, the NCSU Libraries logo and a 360 LINK icon are visible. Below the header, a search result is displayed for the article: "Battista, Andrew (10/02/2017). 'Consortial Geospatial Data Collection: Toward Standards and Processes for Shared GeoBlacklight Metadata'. *Journal of Library Metadata* (1938-6389), 17 (3-4), p. 183." A message states: "NCSU does not appear to have online access to this item. Here are other options:". Two buttons are provided: "Chat Now" for immediate assistance and "Request a PDF" via Tripsaver, which is usually delivered within 1 business day. Below these buttons, a note asks users for assistance in finding access to the item and to check the library catalog. At the bottom left, there are links for "Report an error" and "Get 360 Link URL". At the bottom right, a chat widget is visible with the text "Need help? Chat with us now." and buttons for "Chat" and "No thanks".

Request Process: Challenges

Requesting from the ILL homepage presents a challenge as well

Exit rate for this page: **63%**



The screenshot shows the NCSU Libraries website. The header includes the NC State University logo and navigation links for Resources, Find, Get Help, Services, Libraries, and About. A search bar is present with the text "Search books, articles, journals, website". The main content area features the "Tripsaver" title and a "Login to Tripsaver" button. Below this, it lists "Tripsaver Services include:" followed by sections for "INTERLIBRARY LOAN" and "TRLN DIRECT". The "INTERLIBRARY LOAN" section explains that the library borrows materials from other libraries and document delivery vendors, with no charge for this service. It also notes that NCSU faculty, staff, registered students, and Centennial Campus partners may use this service, with a link to the "Interlibrary loan FAQ". The "TRLN DIRECT" section describes a service for quickly filling interlibrary loan requests from Duke, NC Central, and UNC Libraries, with a 1-2 business day delivery time. At the bottom, there is a link for "DOCUMENT DELIVERY OF NCSU OWNED MATERIALS".

Request Process: Identified Solutions

Ongoing staff training:

- How to send direct links to pre-filled request forms
- How to explain our ILL services in an approachable way.
- How to use ILLiad to answer basic questions about the status of a request

Ask Us
Tripsaver Training

Spring 2019

Request Process: Challenges

“ The form...is it read by a human?

I didn't notice the **Submit Request** button

Do I have to fill out all of the fields?

What does ISBN mean?

The screenshot shows the NCSU Libraries website interface. At the top, there is a navigation bar with links for FIND, GET HELP, SERVICES, LIBRARIES, and ABOUT. Below this is a search bar with the text "Search books, articles, journals, website". The main content area is divided into several sections:

- My Account**: Includes links for Checked Out, Holds/Requests, Fines, and Account Info. It also shows the user is logged in as MIA PARTLOW.
- TRIPSAVER**: Includes links for Digital Deliveries, Checked Out, Request an Item, Request History, and Tripsaver Settings.
- ROOM RESERVATIONS**: Includes links for My Reservations and Reserve a Room.
- LOGOUT**: A link to log out of the account.

The **TRIPSAVER: ARTICLE REQUEST** form is the central focus. It contains the following fields:

- Source Title: Journal of Library Metadata
- Article Title: Consortial Geospatial Data Collection: Toward Standards and Proce
- Article Author: Battista, Andrew
- Volume: 17
- Issue: 3-4
- Article Date: 2017
- Article Pages: 183-
- Source ISSN: 19386389
- OCLC or Decline UI Number: (empty)

Instructions on the right side of the form state: "Use this form to request a copy of an article from a journal, magazine, or newspaper that is unavailable in the NCSU Libraries. Provide as much information as you can." and "You will be notified via email when this item is available, it will be delivered to you as a PDF file. Please add library_tripsaver@ncsu.edu to your contacts so you receive this notification." The copyright law of the United States (Title 17, United States Code) is also mentioned.

Request Process: Identified Solutions

Hiding certain fields in the request form

Display error when user leaves page without submitting

Redesigning page to be in line with current UX standards

Encouraging use of the Notes field

NCSU LIBRARIES FIND GET HELP SERVICES LIBRARIES ABOUT

Search books, articles, journals, website Q ASK US MY ACCOUNT HOURS FAQ LOG OUT CHAT NOW

My Account logged in as MIA PARTLOW

NCSU LIBRARIES
Checked Out
Holds/Requests
Fines
Account Info

TRIPSAVER
Digital Deliveries
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TRIPSAVER: ARTICLE REQUEST

Source Title
Journal of Library Metadata

Article Title
Consortial Geospatial Data Collection: Toward Standards and Proce

Article Author
Battista, Andrew

Volume
17

Issue
3-4

Article Date
2017

Article Pages
183-

Source ISSN
19386389

OCLC or Docline UI Number

Use this form to request a copy of an article from a journal, magazine, or newspaper that is unavailable in the NCSU Libraries. Provide as much information as you can.

You will be notified via email when this item is available, it will be delivered to you as a PDF file. Please add library_tripsaver@ncsu.edu to your contacts so you receive this notification.

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thank you

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