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

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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

93 chat transcripts

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

LOGOUT

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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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
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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.

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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
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Checked Out
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Request History
Tripsaver Settings

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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

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, a search bar, and navigation links for Resources, Find, Get Help, Services, Libraries, and About. The main content area is titled "Tripsaver" and includes a "Login to Tripsaver" button. Below this, it lists "Tripsaver Services include:" and details the "INTERLIBRARY LOAN" service, which allows borrowing materials not available in the NCSU Libraries. It also mentions "TRLN DIRECT" as a service for quickly filling interlibrary loan requests. The footer indicates "DOCUMENT DELIVERY OF NCSU OWNED MATERIALS".

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?”

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?

NCSU LIBRARIES FIND GET HELP SERVICES LIBRARIES ABOUT

Search books, articles, journals, website

logged in as MIA PARTLOW

My Account

NCSU LIBRARIES

- Checked Out
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TRIPSAVER

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

ROOM RESERVATIONS

- My Reservations
- Reserve a Room

LOGOUT

TRIPSAVER: ARTICLE REQUEST

Source Title
Journal of Library Metadata

Article Title
Consortial Geospatial Data Collection: Toward Standards and Processes

Article Author
Battista, Andrew

Volume
17

Issue
3-4

Article Date
2017

Article Pages
183-

Source ISSN
19386389

OCLC or Decline 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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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

The screenshot shows the NCSU Libraries website with a red header. The main navigation bar includes links for FIND, GET HELP, SERVICES, LIBRARIES, and ABOUT. A search bar is located in the center of the header. Below the header, the page is divided into three columns. The left column contains links for 'My Account' (logged in as MIA PARTLOW), 'NCSU LIBRARIES' (with sub-links: Checked Out, Holds/Requests, Fines, Account Info), 'TRIPSAVER' (with sub-links: Digital Deliveries, Checked Out, Request an Item, Request History, Tripsaver Settings), 'ROOM RESERVATIONS' (with sub-links: My Reservations, Reserve a Room), and 'LOGOUT'. The middle column is titled 'TRIPSAVER: ARTICLE REQUEST' and contains a form with 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), and OCLC or Docline UI Number. The right column contains instructions: '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.' and 'The copyright law of the United States (Title 17, United States Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions'.

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thank you

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