Staff Education in Automation Through Vendor Demonstrations

Linda Folda

The implementation of an automated library system is a complex, time-consuming, and costly process. Anyone who has gone through it or is even just beginning to read about it is aware of the importance placed on staff education and training in ensuring a smooth transition from manual to automated routines.

Joseph R. Matthews points out that,

Unlike ducks and water, people do not take naturally to computer systems. People, both staff and patrons, must be properly introduced to the computer and oriented as to how computers work—and how computers do not work. They often must be cajoled into using the computer and seeing ways the computer can help them in their work.[1]

And John Corbin states that, "Introducing a new automated system can be particularly traumatic because it involves change and technology, two societal elements that some people fear and distrust."[2]

Lurking in the background is the notion, presumably based on bitter past experience, that a recalcitrant staff member who opposes change, especially any change that is associated with that nasty word, "technology," will sabotage the system by refusing to learn how to use it correctly.

We have not so far identified any such recalcitrant staff members at the Chapel Hill Public Library. We have, nonetheless taken these caveats to heart and liberally sprinkled our three-year time line for the implementation of an automated system with training sessions. These training sessions are aimed at the entire staff but are of special relevance to the support staff who do not have the benefit of exposure to automation through the workshops, conferences, and visits to other libraries that are available to the professional librarians. The sessions so far have covered a variety of topics including the terminology of automation, the design and component modules of an integrated library system, the why and how of retrospective conversion, and the linking capabilities of barcode labels.

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There is no question, however, that library automation is fraught with the thousand words syndrome: however much you describe an automated procedure, be it with words, charts, graphs or screen layouts, it only takes on form and meaning when seen in operation. Providing that form and meaning for the staff became our goal in arranging a series of four in-house demonstrations presented by major vendors of automated systems.

Preparing for Vendor Demonstrations

The success of these demonstrations, as with any of the steps of the automation process, was based in large measure on careful preparation.

We began by identifying the systems that seemed most likely to meet our needs. We were looking for a fully integrated system that would include modules for acquisitions and serials control. Our greatest emphasis, however, would be placed on the clarity, flexibility, and ease-of-use of the circulation module and the public access catalog. Finding systems with the necessary combination of features was done by reading current library literature on what was available, soliciting information materials from the vendors themselves, and trying out the systems at library conferences.

The next step was the preparation of an evaluation form for the staff to use during the demonstrations. We found writing this form, which is included at the end of this article, to be a useful check on our choice of vendors in step one. The questions in the form were distilled from the draft list of specifications drawn up by the librarians on the staff after studying five or six existing requests for proposals. While at this point we were still a long way from developing a clear notion of "mandatory" specifications, the questions were designed to highlight features of a system that we felt were important and to draw the attention of the staff to the possible benefits of an automated system. Before the demonstrations began, a training session was held for the staff during which the purpose and content of the

form was explained. There were no requirements, however, that the form be used or that it be turned in for evaluation.

We contacted each vendor several weeks before the first demonstration, initially by phone and then by a follow-up letter which provided some background information about the library, outlined the basic schedule of events we had in mind for the implementation of an automated system, explained why we felt this system would be a good candidate for our needs, and discussed the purposes of an in-house demonstration. Each representative was asked to send three or four packets of information about the system for routing among the staff prior to the demonstration. Each was also sent a copy of the staff evaluation form and asked to organize the demonstration on the basis of that form. This tactic proved to be especially helpful when demonstrations ran overtime because the technical services staff, whose concerns were addressed toward the end of the form, were more at liberty to stay and continue the demonstration.

The four demonstrations were scheduled at intervals of approximately five weeks. Wednesday was picked as demo day because most of the staff could be at the library either in the morning or afternoon, and no other activities were scheduled in the meeting room on that day. Each vendor was asked to schedule a three-hour presentation to begin at 9:00 in the morning and to be repeated at 2:00 in the afternoon.

We clarified equipment needs well in advance with each vendor. For two of them we needed, and had installed in the meeting room, an independent telephone line for accessing remote data bases. There were also calls for an overhead projector, a chalk board or flip chart, and tables for arranging the equipment; and it never hurt to have a couple of extra extension cords on hand.

In the course of this process we learned an important corollary of library automation projects: a snafu will inevitably occur despite any amount of careful preparation. One vendor arrived with a team of three people and a van of equipment, only to discover that somehow the terminal keyboard had not been put on board. Fortunately, a local businessman had a compatible keyboard and was willing to loan it for the day. In another case, we attached the vendor's modem to the phone jack and discovered to our dismay that the telephone company had mistakenly disconnected the line. Happily, some helpful operator responded efficiently to our anguished call, and the demonstration took place almost as scheduled.

Benefits of Vendor Demonstrations

The responses of the staff have been most gratifying. We have a wide range of computer literacy among our staff members, from computer hacks to computer phobes. But even the hacks, however, had had very little exposure to library automation. In all cases, it was apparent that as the demonstrations progressed, so did the comprehension, from glassy-eyed puzzlement after the first vendor's visit to a clear idea of what might show up on the terminal screen next and why.

The more experienced staff members were impressed by the versatility and flexibility of the systems presented. They were aware of the amount of data being manipulated and felt that the many options available for accessing that data were easy to understand and use. For people on the circulation staff some of the possibilities presented were downright dazzling: being able to identify in a few seconds where a book is, be it on the new book shelf, in mending, or overdue; having control over the whole process of recording fines, printing overdue notices, and blocking delinquent patrons.

While some of those staff members who might originally have been classed as computer illiterate did not emerge feeling completely comfortable with automation, their acceptance level was greatly enhanced. They were pleased to discover that they could in fact distinguish differences among the systems and form opinions about which features they liked better than others. They could see how efficiently the systems handled such labor-intensive activities as checking in materials and placing reserves on books. They also became aware of procedures an automated system can handle that are now impossible, such as keyword searching or telling a patron exactly which books he has checked out and when they are due. We sincerely regretted having to tell one staff member who asked, "Can we have it tomorrow?!," that we were almost two years away from having our own system up and running.

There are several other advantages afforded by these demonstrations. For one, the librarians developed a much better understanding of the functional specifications for the individual modules of an automation system and which ones should be included in our own request for proposals. For another, we became aware, almost belatedly, of the public relations impact that could be derived from these demonstrations. We invited as a matter of course any interested librarians in the area to view them; but we also asked

town officials and library trustees—basically anyone who was completely in the dark about library automation but who might have some impact on the approval process, either directly or in terms of patron support.

The system representatives themselves were all very cooperative and helpful. They arrived as scheduled, required very little assistance with setting up or taking down their equipment, arranged their terminals for maximum visibility, and had numerous handouts for the staff. Our staff members are not, by and large, reticent about asking questions. In almost all cases, the demonstrator took pains to show how the system responded to the needs expressed in those questions. Indeed, much of the credit for the success of this educational enterprise is due to the vendors themselves.

Through this series of demonstrations the staff members became acquainted enough with the features of an automated library system to realize that this new technology is not only not threatening but in fact very helpful in providing services and information to public and staff alike. It will be nice when we can say, "We'll have it tomorrow."

References

1. Joseph R. Matthews, *Choosing an Automated Library System: a Planning Guide* (Chicago: American Library Association, 1980), 71.
2. John Corbin, *Managing the Library Automation Project* (Phoenix: The Oryx Press, 1985), 158.

Automation Demonstrations
Chapel Hill Public Library

Vendor Information

Name of company: _____
Providing a library automated system since: _____
Name of system: _____
Number of customers with installed systems as of 6/30/87: _____
Hardware CPU manufacturer: _____
Software operating system: _____

Circulation and Borrower Control

YES   NO

Patron registration
1. Does the system allow searching by *any* of the patron registration fields of information? ____ ____
2. Are records of patrons with fines or overdue materials stored indefinitely? ____ ____

Checkout Activities
1. Does the system permit circulation of uncataloged materials (such as puzzles and pamphlets)? ____ ____
2. In order to accommodate a variety of patron/material categories, does the system provide capability for several loan periods? ____ ____

Renewals
Will the system allow renewal of all items checked out to a patron with a single renewal request? ____ ____

Check-In
Does the system permit and keep a record of "claims returned" check-ins by patrons? ____ ____

Reserves
1. Will the system allow reserves to be placed on a specific copy of a title as well as on all copies of a title? ____ ____
2. Does the system remove reserves from other copies of a title when all the reserves on the title are satisfied? ____ ____

Patron and Item Blocks
Does the system both audibly and visually interrupt the operator when there is either a patron or an item problem at checkout? ____ ____

Fines and Overdues
Will patron records contain a subrecord for each item for which money is owed, including notification information (dates of notices) as well as all fee and payment information? ____ ____

Public Access Catalog

Searching

1. Can you browse the PAC by author, title, subject, or call number?
2. Can you search the PAC by single and multiple keywords?
3. Does the system guide you in continuing a search if no match is found?
4. Does the system make allowances for misspelled words?

Displays

1. Does the PAC have the following displays:
   a. A brief record, consisting of one or two lines of information?
   b. A full record, containing full bibliographic information?
   c. A copy information display, giving information about location and current status of copies, as well as brief bibliographic information?
2. Can you scroll forward and backward as well as page forward and backward?
3. When a search results in more than one item, can the PAC list them in call number order?

Help Messages

1. Does the system have an online, general tutorial on using the catalog and conducting searches?
2. At any point in a search, can you easily get a help message which directly relates to the screen being displayed?
3. Is there an index of the help messages available, with a short description of each?

Acquisitions/Fund Accounting

1. Is the acquisitions function operational now and able to be demonstrated?
2. Can book costs be shared among funds (i.e., general book funds and gift/memorial funds)?
3. Can the system report on vendor performance
   a. in percent of order filled?
   b. how soon filled?
   c. average discount?

Serials

1. Is the serials function operational now and able to be demonstrated?
2. Can the system automatically alert the operator when missing issues need to be claimed?
3. Does the system display holdings information on the PAC?

Management Reports

1. Does the system record and store statistics on all automated library transactions?
2. Can the system provide reports on the following?
   a. Total fines and fees collected for overdues, and for lost and damaged materials over a certain period?
   b. List in shelflist order titles which circulated more (or less) than a specified number of times during a specified time period?
   c. Bibliographies by Dewey call number range, author, material type, subject, etc.? Can these categories by combined (e.g. subject and material type)?
   d. Number of patrons with materials currently charged out?
3. Can the library formulate new reports without programmer intervention?

Cataloging and Data Base Maintenance

Adding information

1. Can the system check for name consistency and alert the operator if there are problems?

2. Can the system alert the operator if a new subject heading is being added so cross references can be checked?

Deleting information
1. Can deleted records be kept in an archival status for up to two years?
2. Can the system automatically deblind cross references to deleted subject headings?

Changing information
1. Can authorized users manually change any part of a record (e.g., adding birth and death dates after an author's name, changing an edition statement, etc.)?
2. Can *subject* heading changes be made globally (e.g., "Russia" to "Soviet Union") in all occurrences?

Reports
Can the system track patron search terms and alert the operator of terms being used frequently that result in no items retrieved?

General Factors

1. Are all functions of the system linked so that a patron or staff member using a terminal can tell if an item is:
   on order?
   in process?
   checked out?
   when it is due?
   at the bindery?
   on the shelf?

2. In your opinion, would this system be easy to learn and use
   as a staff member?

   Yes /___/___/___/___/___/ No
        1   2   3   4   5

   as a patron?

   Yes /___/___/___/___/___/ No
        1   2   3   4   5