Analysis of Electronic Resources Workflows Using Focused Rapid Contextual Design

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Image: uci.edu

Electronic Resources Management

- Bulk of the maintenance work is done by the ER Acquisitions unit (Librarian and 4 staff members)
- Cataloging and record loading is done by the Cataloging department (Librarian and 5 staff involved)

Why did we do this?

This confusing map stood at Dalston Junction for around forty years.

Rapid Contextual Design: an overview

Contextual Design:

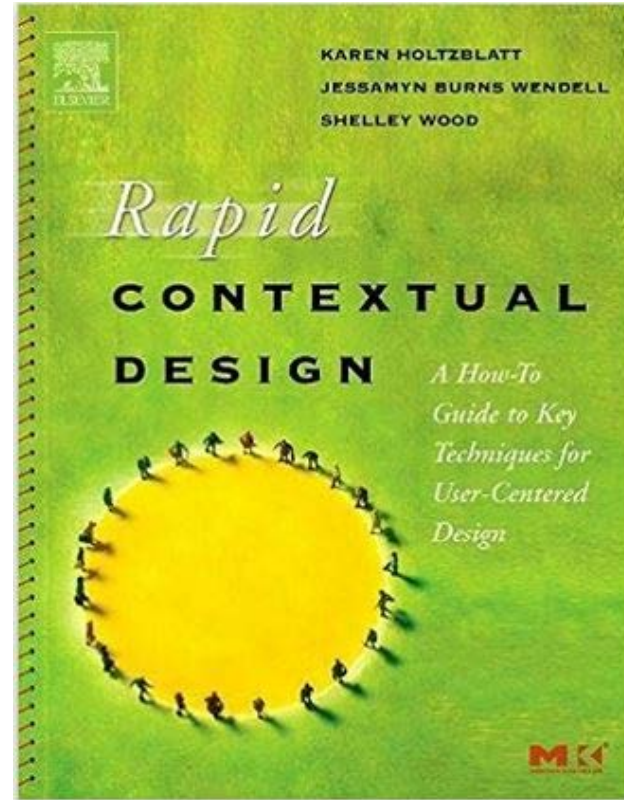"A scaffolding for user-centered front-end design"
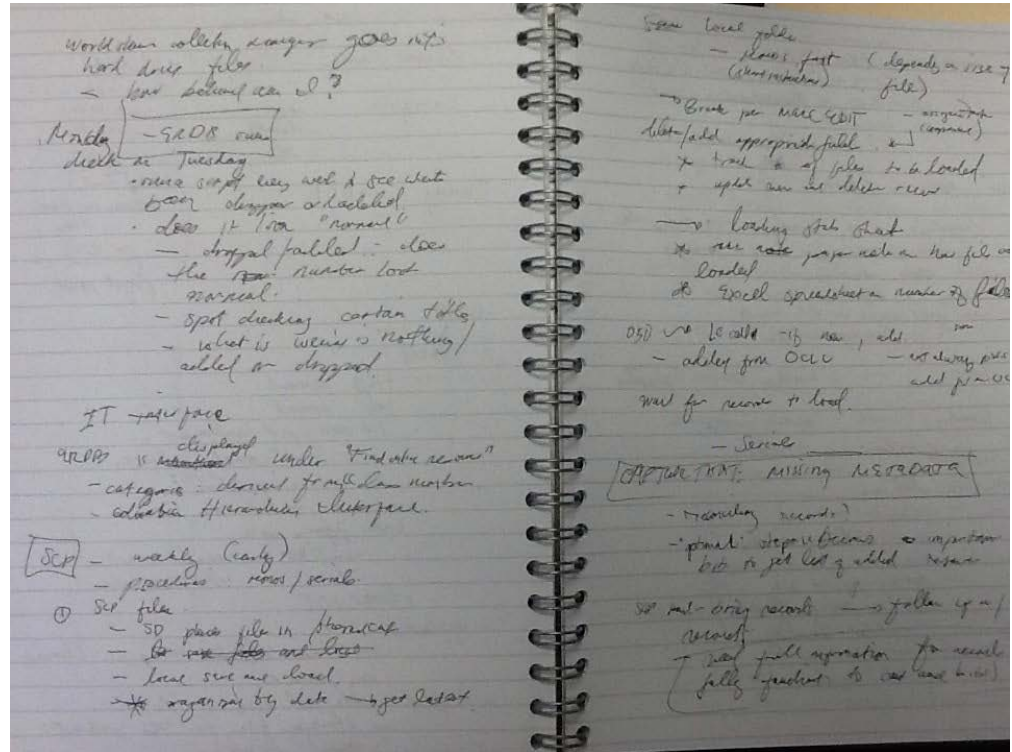

Image: amazon.com

The methodology

- Define the scope: **quick fixes/new processes/evaluation/supporting a coherent task**
- Making the case
  - Address specific objections
  - User data - fast!
- Make it **rapid** (5-7 weeks)
  - Consider whether you need all the steps to answer the scope
  - Chunking
  - *However: do not break up a coherent workflow if it stretches across two departments*

The methodology (what we left out)

- Consolidated sequence model
- Personas
- Visioning
- Storyboarding

Methodology: the interview

- ***USER AS EXPERT***
- Users based on role
  - Consider context
- Environment-centered interview style (one of several options)
- Capture key task and breakdowns
- We as observers have to look beyond the task to see a more coherent picture

Methodology: the interpretation session (1)

- Minimum of 2 people
  - Interviewer
  - Moderator
- Specific session roles
  - Note-taker
  - Commentator(s)
- Invite participants from outside the department or unit

Methodology: the interpretation session (2)

- Insights
- Bottlenecks
- Design ideas
- Follow-up issues
- Rat holes (non-productive discussion)
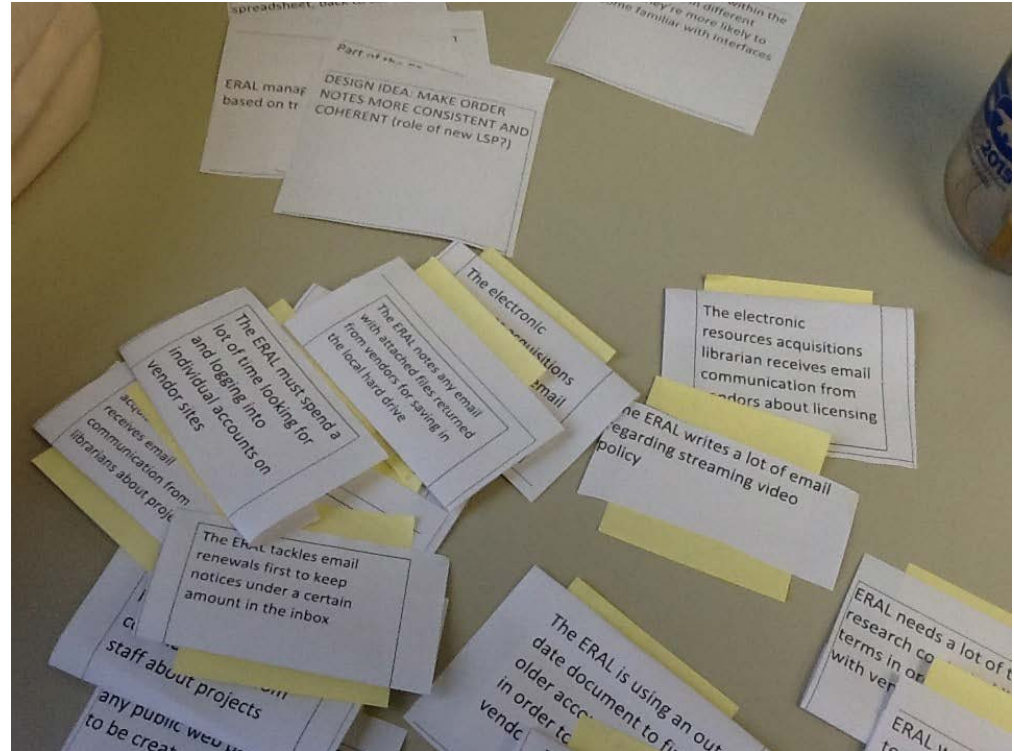
Methodology: workflow model

Artifact model

Physical model

The sequencing model

- Real steps
- Triggers
- Intents
- Breakdowns
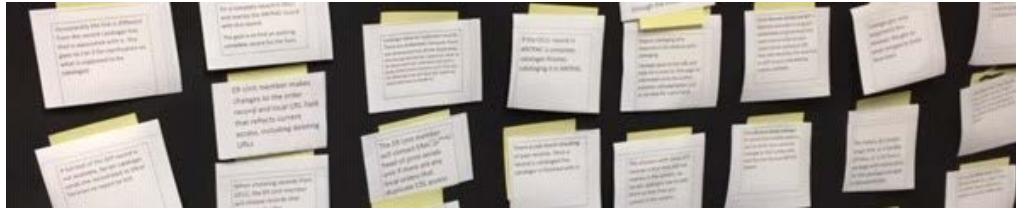
Methodology: Affinity notes

- Standalone
- No jargon
- Anonymized
- Facts only -- no opinions
- Be specific

Methodology: Affinity wall

- CONSOLIDATE KEY TASKS INTO MAJOR THEMES/IDEAS
- Good color labels provide a narrative without having to read the individual notes below
- BLUE notes
  - Grouping individual notes into key processes
  - Relevant to specific workflow design
- PINK notes
  - Grouping BLUE notes
  - Reveal key issues in data about workflow
- GREEN notes
  - Grouping PINK notes
  - Reveal major themes in workflow

How we used Rapid Contextual Design
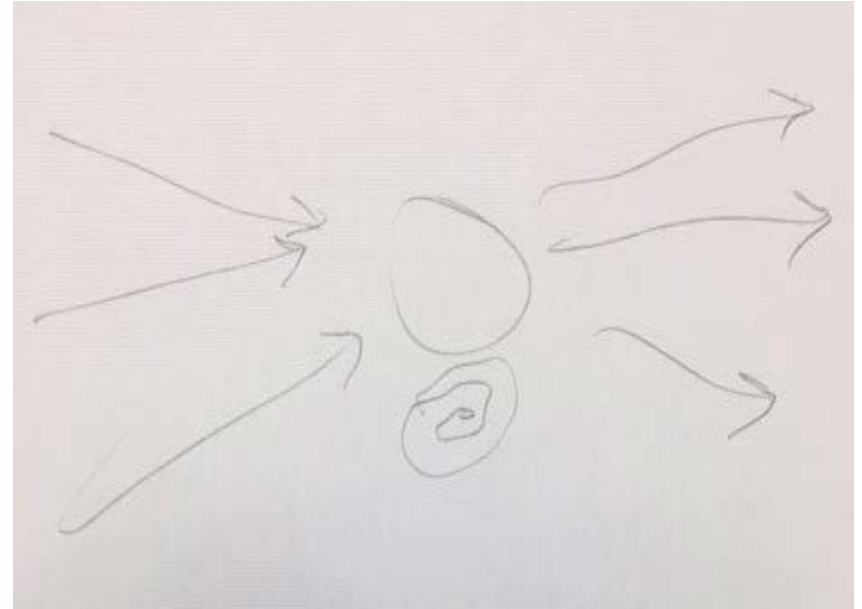
Our Plan

- Contextual inquiry: interview staff members
  - Limited to 2 in each department plus each other (the 2 librarians)
- Interpretation sessions and sequence models
- Affinity Diagram Building
  - Use notes from the interpretation sessions to bring together all the data from the interpretation sessions into one large diagram
  - "fastest and best method to see all the issues across your user population"

Interviewed chosen staff members

- Identified 2 staff from each department who represented a range of electronic resources activities (ordering, cataloging, trouble-shooting, etc)
- Each librarian interviewed the staff people from the other department
- Librarians also interviewed each other

Interpretation sessions

- Soon after interview held "interpretation sessions"
- Identify and record details of the work, triggers for work, tools involved, bottlenecks, communication breakdowns, etc
- For our own interviews, invited a colleague to participate, so as to provide some objectivity (from Libraries IT and Cataloging)

Affinity Notes

Unplanned Complications

- Work and unexpected personal travel needs
- Sequence models not done extensively -- interfered with workflow charts related to Alma
  - Because our sequence models were just sketches, we were not able to do the consolidated sequence model, which consolidates the sequence models of individual tasks.
- Not a direct translation to Alma

Results

- Affinity wall session
  - No major issues
  - Very little overlap in work
  - Communication issues
  - Unit/department head communication
- Internal report shared with department heads

Implemented Steps

- Clarify electronic record choices in OCLC
- Quarterly group meetings of all staff working with e-resources
- More clarification on larger structure of DDA, discovery layers, CDL consortium info, etc
- ER Acquisitions librarian is passing along issues that are more cataloging-related
- We established some standing items for meetings (batch loads, other updates)
- Alma activation list is currently being used

Next steps

- Continue research with unit and department heads and their workflows
- Once we stabilize the Alma/Primo transition, we plan on examining our workflows in the new system
- Assessing skills within our units in general

We have found that the Rapid Contextual Design model is adaptable and accommodating to our limited time and resources.

References

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