

We Deliver: Overcoming Microform Collection Access Issues with Electronic Delivery

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Abstract

This presentation described the problems library users experienced trying to scan and save or print microform images at Valparaiso University. Complex, difficult to use equipment and software, unfamiliar formats, and file management difficulties interfered with a good experience for the user. Working to remove barriers to obtaining information, Weare piloted a project for library staff to scan and deliver electronically to users content from the microform collection. Not only did the process work, but the project proved that staff could successfully provide such a service.

Introduction

William H. Weare, Jr. presented information on the launch of a pilot program to deliver microform content electronically to users. The implementation of the program was a shift from a self-service model to a staff-serviced model of access for their microform collection.

The Environment

Valparaiso University is an independent Lutheran institution located in Valparaiso, Indiana, about sixty miles southeast of Chicago. The University enrolls about four thousand students, including about five hundred in its School of Law, and offers more than seventy programs in five colleges.

The Christopher Center for Library and Information Resources (CCLIR) opened in 2004 and is a four-story building of 115,000 square feet built for about \$33 million. In addition to the library, it houses Information Technology, the Writing Center, and the Teaching Resource Center. The CCLIR was the fifth library to include an automated storage and retrieval system, which holds lesser used items, older serials, and government documents. The building also includes a large, multipurpose room for community events; a rooftop terrace; three fireplace lounges; modernist furniture; a variety of work spaces, including alcoves and study rooms designed for group study; and a popular café. There are 185 public access computers and two instruction rooms with an additional sixty-three workstations. The collection includes about three hundred thousand printed volumes, about four hundred print subscriptions and microform titles, approximately twenty-two thousand e-journals, and more than seventy thousand maps and other cartographic materials, as well as thousands of sound recordings and reels.

The microform room holds about nine hundred thousand microform units. This rich collection, which is rarely used, includes large humanities sets, classified microfiche and microfilm, newspapers, periodicals, the Education Resources Information Center (ERIC) microfiche collection, and over six hundred thousand government documents. Two microform readers linked to two workstations loaded with scanning software and three older microform reader units constitute the available equipment for viewing and saving images in microform. Although functionally adequate, the workstations are not user-friendly to the average library patron or staff member.

The microform room sits adjacent to the circulation desk in prime real estate, illustrating the importance of help being in proximity to the collection and the equipment needed to use the collection. Although the collection is set up to be self-service, most users need assistance. Circulation staff are available to assist users during all open building hours.

The Problem

The process to be followed by the user to get and save the images is as follows. We are asked everyone to keep in mind the way this process might be experienced by a first-year student relative to ease of use.

Two microform scanners are attached to two personal computers loaded with proprietary software, which is designed for a kiosk, and not much else. The user must open the proprietary software and choose a language. There are several help videos available, but they are seldom watched. The program asks for the user's name, which is what the software uses for a file name. Then the menu appears.

Using the microform equipment, the user locates the desired article or image and manually adjusts the controls for focus, size, centering, and contrast. Back at the workstation, the user selects "scan," which can produce a less than ideal quality image. This image can be cleaned up by using options provided by the software to remove speckles and random marks, to rotate, and so on. The user accepts the cleaned-up image. While it may not look all that great on the screen, when printed the image may be better quality. Then the user is asked if another image is to be scanned. The process is repeated until the user has scanned all the images needed.

At this point, the user is asked if the images are to be saved or printed. When the user saves the images, the process appears to have ended. There is no indication of where the file is saved or what it is called. In the meantime, since the software is designed for a kiosk, it returns to the beginning of the process. If the user prints the file, "print" is selected, and then the user clicks to approve paying for the prints. Again, since the software is designed for a kiosk, the software returns to the beginning of the process. Since the user is done, they expect to log off, but there does not seem to be a way to shut down. So, the user opens the task manager and selects "end task" and finally ends up at the desktop.

Where is the user's file? The user must go to their documents on one of the shared drives, where the software created a folder named whatever “name” he or she used at the beginning of the process. The user must select a program to open the image. One program that could be used is photo-editing software. This program makes it possible to further clean up the images.

Believing that great services make great libraries, Weare does not think this process meets the standard of great service. The process is a disservice to the user, as this self-service collection is not truly self-service. The software is not terrible, but it is not easy to use; it is prone to error and its complexity creates training issues for both staff and patrons. Other problems include users not being able to save to a flash drive or a CD-ROM or not being able to send the documents to themselves via e-mail due to the e-mail program used at Valparaiso University.

In review, there are problems with equipment, software, and file storage. The user does not have a choice of where or how to save the images. The software does not tell the user where the images have been saved. The user who is not affiliated with the university does not have a log-in or shared space to which to save the file and so is hampered in access to this service. Users have little motivation to use the microform collections, so the microform room is “not a hub of activity” and the lights often are not turned on.

The Solution

To solve this problem, the Access Services and Interlibrary Loan (ILL) departments undertook a pilot project to deliver selected microform content electronically to undergraduate students in the 2008 fall semester.

As Access Services Librarian, Weare takes a broad view of access. To him, it is about more than circulation and reserves; it is about connecting people to information. He sees his work as removing barriers to information. So, he posed the idea of electronic delivery to his colleagues, staff, and Dean. He discussed specifics with the librarian who oversees interlibrary loan (ILL), with the ILL staff person, and with the circulation manager who was to oversee the access services part of the process.

The service is outlined in an information page about the pilot that is posted as a frequently asked questions Web page.¹ The pilot program was implemented to see if the new service model would be useful and if it would work with its intended audience of undergraduate students. Why undergraduates? They are assigned projects where use of the microform collection is necessary and they particularly find the format unattractive. Also, with undergraduates being a transient population on campus, any real problems will be forgotten in a relatively short period of time. A pilot would give the staff time to work out processing difficulties before the service availability was widely announced.

There was no formal marketing of this new service. Weare, as liaison to both the English and Education departments, attended faculty meetings and told them about the pilot service for undergraduates and said that faculty requests would be filled. Additionally, he explained the pilot in the library instruction classes he taught for a dozen English classes and for all sections of the

course required of all potential education majors, “Introduction to Teaching and Field Experience.”

During the pilot, only about five or six documents were delivered using this process. However, the ILL staff person also filled ILL requests using the local collection, so many more documents were scanned. This was not seen as part of the local document delivery service and circulation staff were not involved in this ILL retrieval and scanning.

The success was not only that the process worked, but also that the library could make the shift from the self-service model to a service-desk model. Circulation managers already help most users with microform, so it is desirable to make it clear to users that “we will help you” or that “we will do this for you.”

With the pilot in place, and having wanted to upgrade the microform equipment, Weare requested the purchase of new equipment, which his Dean approved in the 2009 spring semester. The software offers more options for cleaning up documents and images and for saving and storing files: burn a CD; save to the hard drive, a shared file space, or a USB drive; or print. The new equipment is located at the circulation desk, not in the microform room. It might be moved later, but for now staff need to learn to use the equipment. Although the new equipment is an improvement, it is not necessary to have new equipment to offer this service. The service goal is to provide requested documents within twenty-four hours.

At this point, the soft rollout is over. The service is available to all students, faculty, and staff. Current work includes planning and implementing a marketing plan for the service, setting policies, assigning duties, coordinating more closely with ILL, continued training on the new equipment, and making and posting new signs. The next step might include content from the automated storage and retrieval system (journals dated 2003 and earlier) in the service now that the pilot has concluded.

The delivery of locally owned material is not a new idea. Many libraries do or have offered this service: James Madison University, Princeton University, Texas A&M University, University of Central Florida, University of Iowa, and others. However, the targeted audience varies; sometimes it is faculty only or distance education students only. The type of material available for the service varies, too. A literature search indicated that microform content is not always included. The delivery mechanism varies as well. Sometimes print articles or images are delivered or sent across campus and sometimes the service is offered via the ILL module so that it is only available on a server for a set period of time.

Weare closed the session by asking his audience several questions: Are you delivering locally owned print or microform content electronically? Do you plan to? Or have you made a decision not to do this? Where are you in the process?

Questions from the audience followed. One inquiry was about the equipment purchased for this service. Weare said the CCLIR purchased S-T Imaging equipment, which can scan micro-opaque format. A question from a public librarian asked about e-mailing large files, which is not possible for many users as their e-mail service cannot handle very large files. Two solutions were offered: break the document into smaller parts or park the article or images on a server and send

a link to the user. Another audience member asked if the microform collection was cataloged. Weare answered that much of it was. The journal back runs are cataloged, but there are some sets where the individual titles are not. Another question about workflow asked if students or librarians scanned the image. Weare stated that users request articles from the databases via ILL, then the ILL staff retrieves the microform and gives it to the circulation desk where staff or student assistants scan the document. ILL staff checks for accuracy and consistency in the image. There was brief discussion about copyright concerns. Weare said it is not seen as an issue at Valparaiso as the service temporarily parks the articles and images on a server for the user to retrieve. The documents are not kept on a permanent basis and are not distributed.

Bibliography

In a review of the library literature, Weare found only one article that specifically addresses the electronic delivery of microform content. Pertinent information can also be found in articles that outline the workflow of an electronic document delivery service, as well as in articles that describe document delivery services specifically for distance education students.

Electronic Delivery of Microform Content

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Notes

1. Christopher Center Library Services, “Microform Content Delivery,” Valparaiso University, <http://www.valpo.edu/library/ill/docdelivery2.htm> (accessed October 6, 2009).