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Using Softchalk For Training

Kathleen Spring

Linfield College, kspring@linfield.edu

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Using SoftChalk™ for Training

Kathleen Spring
Director of Resource Sharing
Linfield College

Presented at OnlineNW
February 11, 2011



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What is SoftChalk™?

- E-learning authoring tool
- Lets you create interactive web content using a WYSIWYG interface (no programming or HTML knowledge required)
- Can share content via traditional web pages, course management systems, CD-ROM, and various learning object repositories



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Why SoftChalk™ instead of . . .

- eXe
- Xical
- Xerte
- Hot Potatoes
- LAMS
- The Latest-and-Greatest e-Learning Authoring Tool



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Using Softchalk™ for ILL Training

- Rationale: we wanted to move our out-of-date operations manual online and create a combination training/reference resource
- Allows for easy chunking of content that can be reused in training materials for other library departments
- Provides interactivity to help student workers retain more of the initial training info



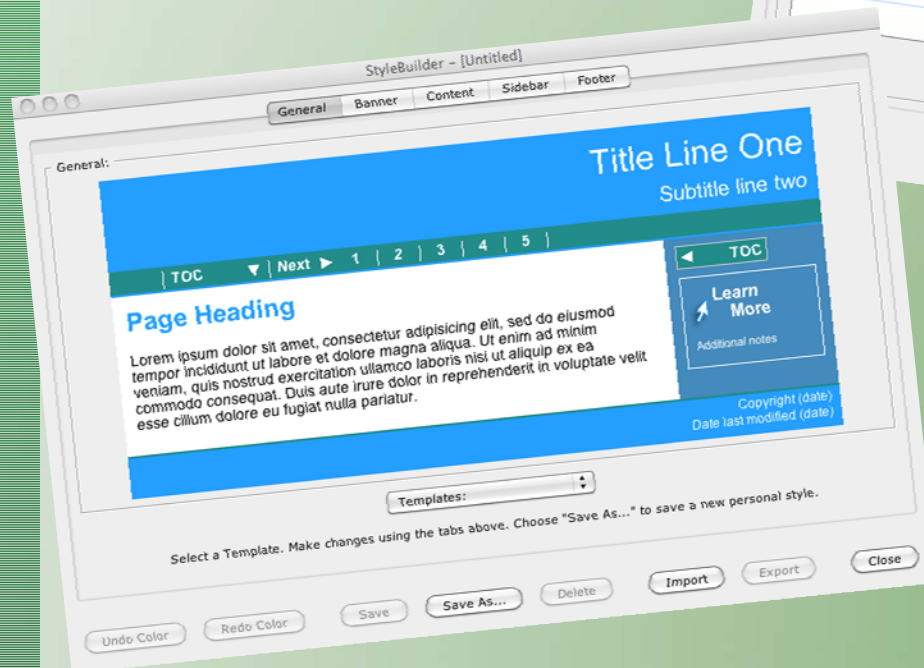
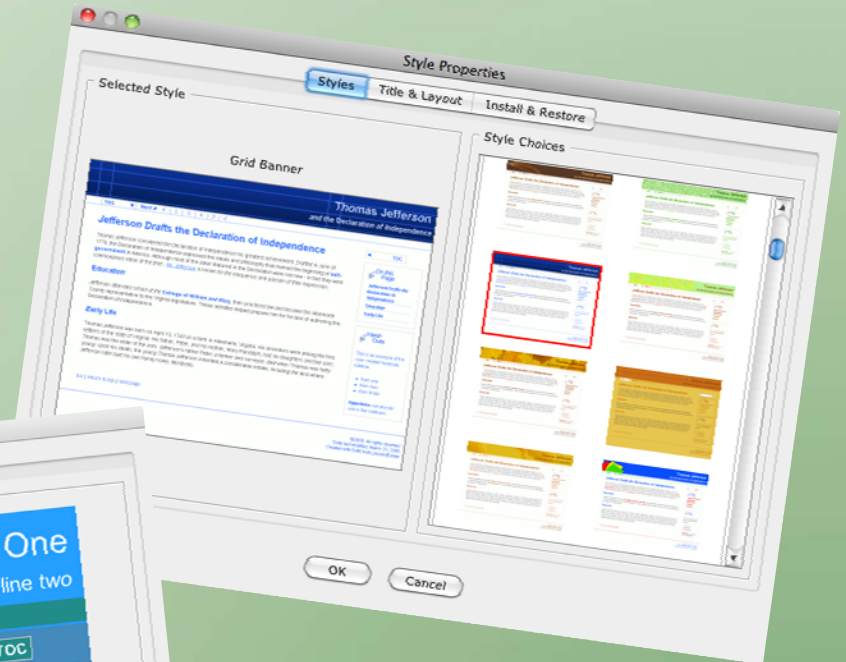
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Softchalk™ Features

- Interactive self-check questions, activities, & games
- Text annotation
- Ability to embed media files (images, audio, & video) & widgets
- Complies with accessibility standards
- Ability to add metadata to lessons
- Various scoring options

Style Options

Use an existing template . . .

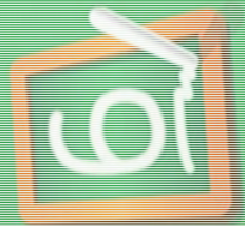


. . . or build your own



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Navigation Options



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How to Create an On-the-Fly Record

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Page 9 ▶

Page 10 ▶ On-the-Fly Warning Message

Page 11 ▶

the ILL item that we receive as a loan gets checked out to our patrons in Millennium. In order to do this, you need to create temporary records known as records. These records are periodically erased from the circulation system once the transactions have been completed. If there are multiple physical items with a single ILL# (for instance, a multi-volume set of books), you'll create an on-the-fly record for each item.

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Style Properties

Styles Title & Layout Install & Restore

Lesson Title

Recommended maximum 30 letters per line

Title:

Subtitle:

Footer

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License:

Sidebar Layout

Right sidebar

Left sidebar

Table of Contents

Table of Contents page

Rollover menu in a sidebar

Dropdown menu at top of page

Navigation

Arrows

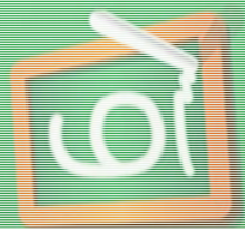
Page numbers

"On This Page" sidebar

Print

Print all pages

Creating Content



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SoftChalk - [RequestingInStaffModeViaNRE]

Arial 14 Plain Text

Step 1

Go to <http://summit.vdxhost.com/vdx/>. Log in to NRE.
Login: llnfdx
Password: llnfdx
Authentication Service: Summit

----- page break -----

Step 2

Click on Search.

NRE [Standard](#) [Advanced](#) [Results](#) [Bulk Action](#) [Batch Update](#) [Saved Searches](#) [Work Queue](#) [Work Queue Edit](#)

Work Queue

- Search** (circled in red with an arrow pointing to it)
- Requests
- Work Queue
- User
- Locations
- Reports
- Report a Problem
- Logout
- Help
- Summit

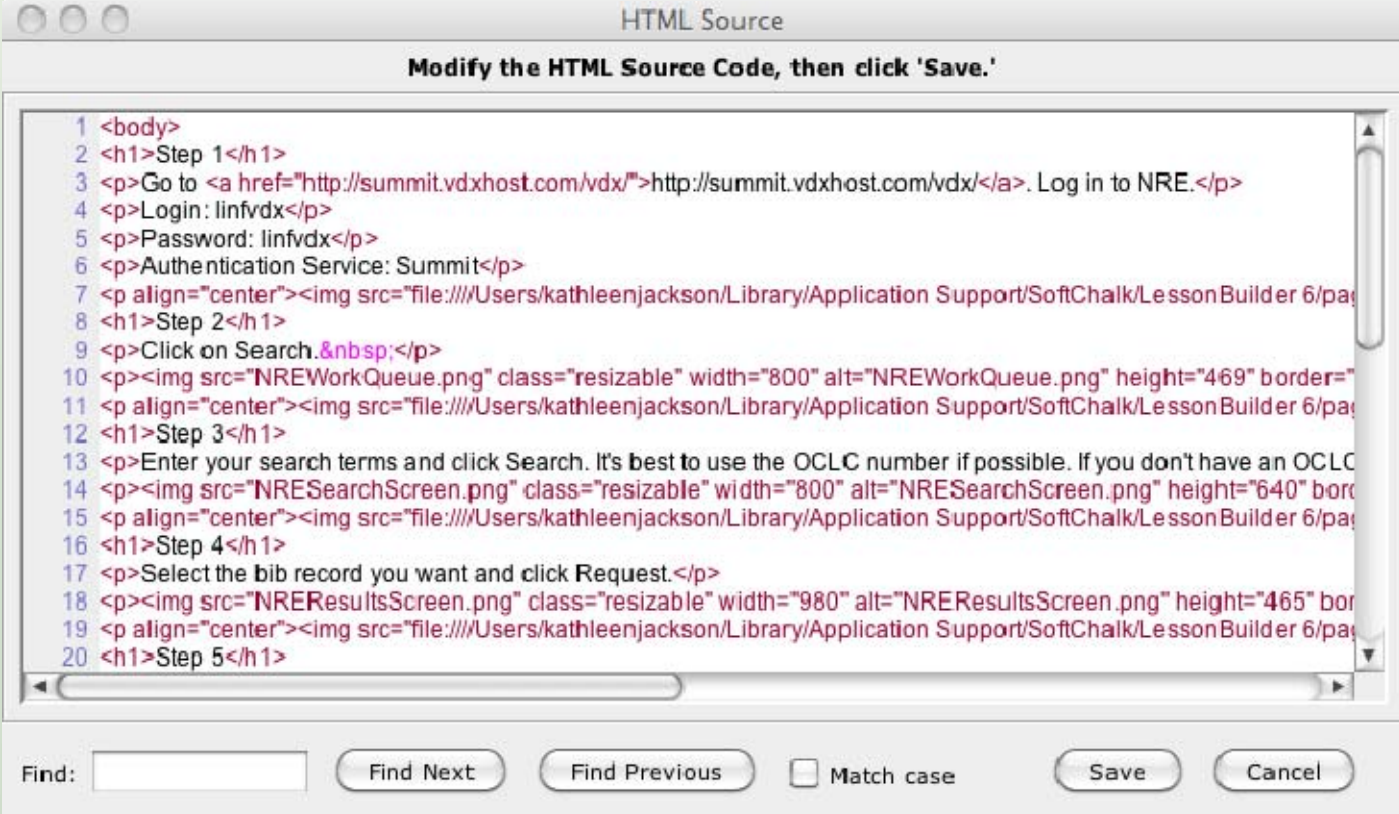
User ID
OLC01

Borrower		Lender	
Category	Count	Category	Count
Idle / Check Manual	0	New Requests	0
Pending	9	New Requests Expiring Today	0
Pending > 4 days	1	Will Supply	8
Pending > 2 weeks	0		
Terminated	0	Conditional	0

Page 1 of 10 Grid Banner, English

Simplicity/familiarity of a standard word processing interface is an advantage

HTML Source Code



```
1 <body>
2 <h1>Step 1</h1>
3 <p>Go to <a href="http://summit.vdxhost.com/vdx/">http://summit.vdxhost.com/vdx/</a>. Log in to NRE.</p>
4 <p>Login: linfovx</p>
5 <p>Password: linfovx</p>
6 <p>Authentication Service: Summit</p>
7 <p align="center"><img src="file:///Users/kathleenjackson/Library/Application Support/SoftChalk/LessonBuilder 6/pa
20 <h1>Step 5</h1>
```

Find: Find Next Find Previous Match case Save Cancel

Option for more advanced design via editing of HTML source code



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Text-Poppers



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Summit Rejects

Page 2 of 5

Contents ▶

When does a Summit reject become an ILL request?

Before processing Summit rejects as ILL requests, we want to verify that the patron has not already submitted a request for the same item. Patrons often submit duplicate requests because failed Summit requests do not show up in the patron's Summit account. If the patron goes to look at their Summit account and doesn't see the item listed, they will often request the item again, thinking the first request did not go through. That second request will almost always fail (just as the first one did), which means that two Summit rejects get forwarded to ILL. So, to verify that we do not already have a request in process for the patron, open the email message. Go into First Search and search by the patron's name to see what requests are currently in process. If you find a request for the same item for the patron, delete the email message. If you find a request for a Portland campus patron, forward the email to pdxill@linfield.edu. If you find requests for non-Linfield patrons (i.e. **visiting Summit patrons**), use the email template from the ILL inbox to let them know they will need to request through the ILL department at their home library, then delete the Summit reject email message.

[return to top](#) | [previous page](#) | [next page](#)

visiting Summit patrons

Students, faculty, or staff who are currently enrolled or employed at Orbis Cascade Alliance institutions and who are on-site at another Alliance library can borrow materials from that library as visiting Summit patrons.

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Multiple Choice Questions



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How to Create an On-the-Fly Record

Page 11 of 11

[Contents](#) ▶

Changing the Due Date

The system will automatically assign a due date to the item. However, we need to make sure that we change the due date to match the due date given to us in OCLC and Clio. Click on Change Due Date and then navigate through the calendar to the appropriate date.

Millennium Circulation - Linfield College Library

File Edit View Go Tools Admin Help

Circulation Desk

Key or Scan Item or Patron B PATRN NAME Spring, Kathleen M

Search

Check Out (2) Checked-Out

Barcode

33019006931118

3512600257444

Change Due Date

February 18 2011

<< < March 2011 > >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Use this date in rest of check-outs for this patron

OK Cancel

Change Due Date

Due Date

Mar 04 2011

Feb 18 2011

If the date you need is greyed out (because the library is closed on that day), choose the closest day **prior** to the given due date. (If this happens, you'll also need to change the due date on the borrowing label or bootstrap to match the earlier due date.) Click OK.

If you have additional items to check out to the same patron, you can repeat the process using a new on-the-fly card. Otherwise, close the patron's record.

Test Yourself



Using the screen shot above as a reference, what date should you enter as the due date in Millennium if the OCLC and Clio records indicate that an item is due on February 24?

- a. February 18
- b. February 24
- c. February 28?

Check Answer

[return to top](#) | [previous page](#)

True/False Questions



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[Show/hide comprehension question...](#)

Assume that this request was submitted and read into ClioRequest on January 31, 2011. The need before date is set far enough in advance for this example.

- True
- False

Check Answer

Right! Good job!

Feedback is customizable



[Show/hide comprehension question...](#)

The information in the Paton Note field should not be deleted.

- True
- False

Check Answer

Actually, it's perfectly okay to delete this text string from the Patron Note field. However, if there were an actual comment from the patron in this field, you would want to leave it there.

The correct response: false

Multiple Answer Questions



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Test Yourself



Which of the following statuses appear on both the borrowing and lending side in ILL? Mark as many as apply.

- a. Shipped
- b. Received
- c. Returned
- d. Pending
- e. Renewal Request
- f. Conditional
- g. Special Messages
- h. Online Produced

[mark all correct answers]

Check Answer

[return to top](#) | [previous page](#)



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Essay Questions

Spot Check

Let's see what you remember from the timelines. Answer the following questions to the best of your ability. If you need to, go back to the previous pages to help you find the correct answers.

Test Yourself



What does it mean when a request appears in the Expired queue?

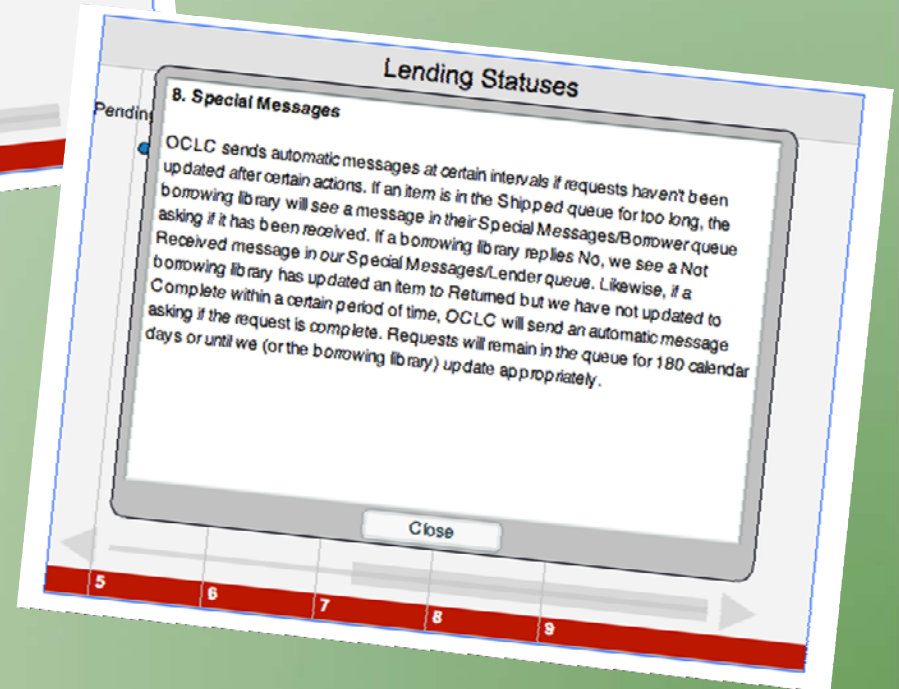
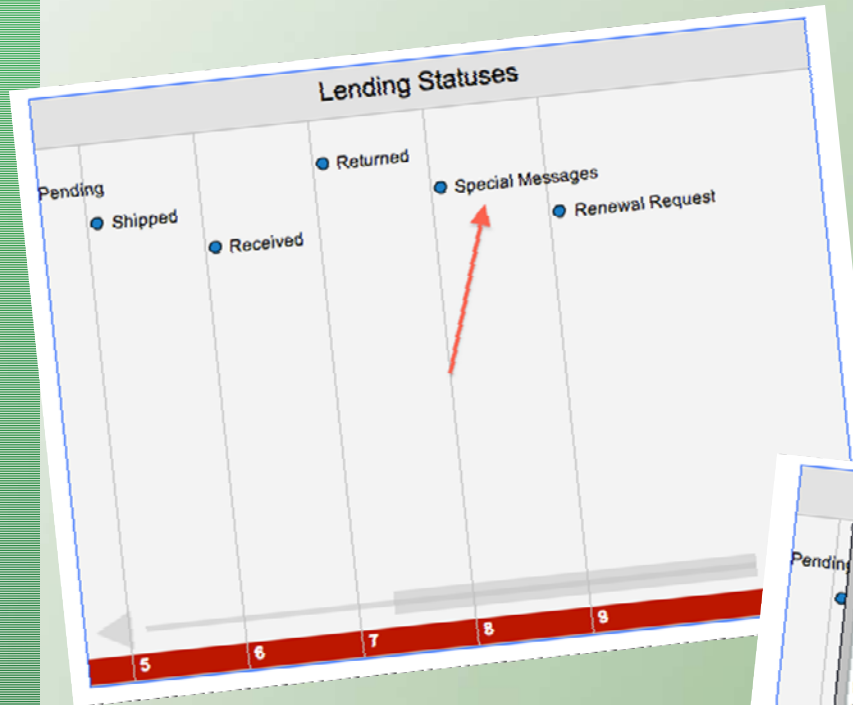
Finish

Print

Timeline Activities



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Ordering Activities



So do you know the order to process Summit rejects? Drag items from the left column to the right column and put them in the correct order. You won't be able to place an item in a slot unless it is the correct one.

	Check to see whether the patron already has an active request for the item
Check for equivalent editions that are available from Summit	Check item availability from Summit
Indicate SUMMIT REJECT or SUMMIT FAILED in the Notes field	If available from Summit, attempt to request via Staff Mode in NRE
Modify lending string based on whether request is a SUMMIT REJECT or SUMMIT FAILED request	
Make a new ILL request from a blank workflow	

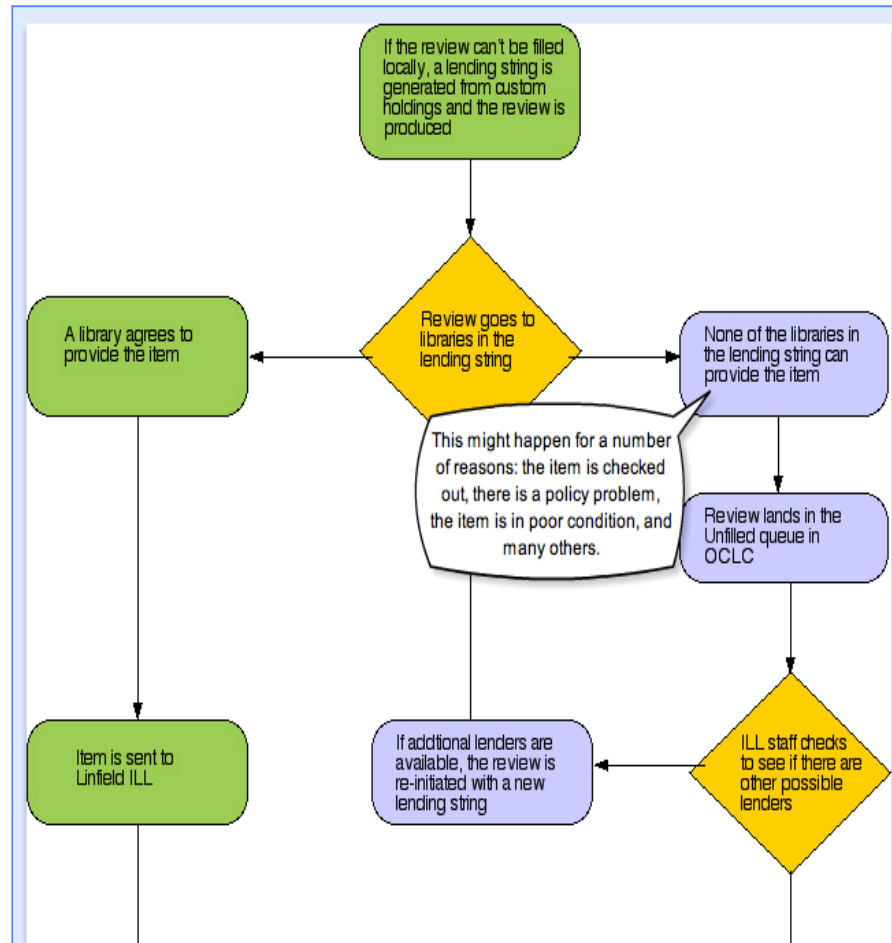


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Hot Spot Activities



This is the second part of the workflow on the borrowing side in ILL. To find out more information about each part of the flowchart, hover over the boxes.



Other Types of Interactivity



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Quiz Poppers

- Short Answer
- Ordering
- Essay
- Matching

Activities

- Charts
- Crossword
- DidYouKnow
- DragNDrop
- Flash Card
- Jigsaw Puzzle
- Labeling
- Photo Album
- Seek A Word
- Sorting
- Slideshow
- Tabbed Info



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Costs for Softchalk™

- Individual license or site license for institutions (individual pricing levels available at <http://softchalk.com/buy-now>)
- Various levels of support
- Free 30-day trial available



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For more information:
<http://softchalk.com/>

Questions?

kspring@linfield.edu