

CALIFORNIA DIGITAL LIBRARY

## **Documenting the American West**

### **User Interviews**

FINAL REPORT

1 July 2004

Prepared by:

Alex Wright  
[alex@agwright.com](mailto:alex@agwright.com)

with: Rosalie Lack, Robin Chandler, Ellen Meltzer, Brenda Bailey-Hainer, Steve Toub, Roy Tennant

# Contents

- Executive Summary ..... 3
- Introduction ..... 4
- Methodology ..... 4
  - Participants..... 4
- Findings ..... 5
  - General Findings ..... 5
    - Sources currently used..... 6
    - K-12 Teachers/Media Specialists..... 7
    - Public Librarians ..... 8
    - Graduate Students..... 9
    - Faculty..... 10
    - Academic Librarians ..... 10
    - Community Colleges ..... 11
- Recommendations ..... 11
- APPENDIX I: Interview Notes ..... 14
- APPENDIX II: Moderator’s Scripts ..... 15

# Executive Summary

This report details the findings from a series of user interviews conducted in support of the Documenting the American West project, from April-June 2004.

Our primary research objective was to generate qualitative insights that could help guide the future development of the American West project, by exploring user needs, behaviors and expectations of online research tools.

Interview participants were recruited from educational institutions and libraries across California and Colorado, including faculty, graduate students, librarians and K-12 teachers.

## Key findings

Participants generally responded favorably to the concept and value proposition of the American West project. Although the interviews revealed a broad diversity of individual research interests and behaviors, several consistent themes emerged:

- **Value of primary source materials**  
Most users place a high premium on access to primary source materials, and see this as the primary value proposition of the American West project
- **Interactive features**  
Many users expressed a strong interest in interactive features, such as dynamic maps and timelines, narrative slideshows, and “learning modules”
- **Search**  
All users expect keyword search as a base feature; many users would also like to search by format, date, location and collection
- **Citation management / publishing tools**  
Academic researchers expressed strong interest in creating and exporting citations, and in creating personal “views” of the collection
- **Location-based views**  
Many users expressed interest in searching or browsing the collection by geographical location

## Recommendations

Based on the interview findings to date, we offer the following recommendations:

- Create **separate gateways** for classroom teaching vs. scholarly research
- Develop **interactive features** to encourage learning and exploration
- Support **advanced search** and filtering
- Allow users to create and publish **personal views** of the collection
- Longer term, encourage users and institutions to **contribute local collections**

## Introduction

In support of the Documenting the American West project, California Digital Library engaged Alex Wright to conduct a series of interviews with potential users from educational institutions and public libraries in California and Colorado.

Our primary research objective was to generate qualitative insights that could help guide the future development of the American West project. To that end, these interviews focused on identifying user needs, behaviors and expectations of online research sources, to explore feature ideas, and to understand current usage patterns with current research sources in fields related to the American West.

## Methodology

From April-June 2004, CDL conducted a series of 18 interviews with 45 potential users, drawn from educational institutions across California and Colorado. Participants included:

- Academic Librarians
- Public Librarians
- Graduate students
- University Faculty
- Community College faculty
- K-12 Teachers and media specialists

The interviews employed the “friendly dyad” format, with pairs of participants teaming up for 60-90 minute interview sessions conducted by a moderator (Alex Wright) with one observer (observers included Rosalie Lack, Robin Chandler, Ellen Meltzer and Brenda Bailey-Hainer). Some interview sessions included up to four participants.

The following table lists the breakdown of participants:

### *Participants*

Role	Institution
Librarian, Collection Development	UC- Davis
Librarian, Special Collections	UC- Davis
Librarian, Collection Development	UC- Davis
Librarian, Bibliographer	UC- Davis
Librarian, Government Documents and Maps	UC- Davis
Librarian, Reference and Collection Development	UC- Davis
Librarian, Education and Psychology	UC- Davis
Archivist	UC- Davis
Professor, History	UC- Irvine
Professor, Chicano Studies	UC- Irvine
Professor, Asian American Studies	UC- Irvine
Professor, History	UC- Irvine
Professor, History	UC- Irvine
Professor, California Studies	UC- Berkeley
Graduate Student, English Modernism	UC- Berkeley

Graduate Student, Medical Anthropology and Psychiatry	UC-Berkeley
Graduate Student, History	UC-Berkeley
Graduate Student, Ethnic Studies	UC-Berkeley
Graduate Student, English Modernism	UC-Berkeley
Graduate Student, US History	UC-Berkeley
Graduate Student, Anthropology	UC-Berkeley
Graduate Student, History	UC-Berkeley
Graduate Student, Archaeology/Anthropology	UC-Berkeley
Graduate Student, Geography	UC-Berkeley
Graduate Student, Social Cultural Studies	UC-Berkeley
Graduate Student, Cultural Anthropology	UC-Berkeley
K-12 Media Specialist	Colorado
4 <sup>th</sup> grade teacher	Colorado
Middle school district technology coordinator	Colorado
Middle school technology coordinator	Colorado
Librarian, Cataloger	Denver Public Library
Librarian, Photography	Denver Public Library
Librarian, History	Boulder Public Library
Librarian	Boulder Public Library
Librarian	Douglas Public Library
Librarian	Douglas Public Library
Professor, Military History	Red Rocks Community College
Professor, History, Anthropology, Geology	Red Rocks Community College
Interim Dean of Humanities, Fine Arts and Social Sciences	Community College of Aurora
MA candidate, History	Red Rocks Community College
Professor, History	Aims Community College
Director, Distance Learning Program	Regis University
Web developer	Regis University

For the complete Moderator's Scripts, see [Appendix B](#).

## Findings

### General Findings

Most participants responded positively to the overall concept and value proposition of the American West project. Although users exhibited a wide range of individual interests and research behaviors, we found broad consensus on several key points:

- Value of primary source materials**  
 Most users placed a high value on access to primary source materials, especially images, and saw this as the primary value proposition of the American West project. For the most part, interviewees were satisfied with their current access to secondary literature through resources such as OPACs and journal indexes.
- Interactive features**  
 Many users, especially in the K-12 and public library communities, felt that the American West site could differentiate itself against more traditional cataloging and indexing sites by creating engaging interactive features, such as interactive maps and timelines, narrative slideshows, or "learning modules."

- **Location-based views**  
Many users expressed strong interest in the possibility of browsing or searching by location, and sifting through data using geographic descriptors, such as GIS data.
- **Citation management / publishing tools**  
Although use of citation management software appears limited, many users nonetheless perceived high value in the ability to generate and export citations, and to create personal “views” of the collection.
- **Search**  
All users expected search as a basic feature, and voiced interest in advanced search features such as the ability to limit by content type, location or collection.
- **Private labeling**  
Participants voiced limited interest in “private labeling” the site for incorporation into their own virtual collections; most participants felt that the service should function as a stand-alone Web site with its own identity.

## Sources currently used

During the interviews, we asked users to identify other Web sites they use regularly as part of their research or teaching, including both licensed resources and free Web sites.

With a handful of exceptions, users relied on the Web as a primary research tool, using a combination of institutionally licensed resources and general Web sites such as Google, Yahoo! and Amazon.

The table below includes a list of sites mentioned during the interviews that seem topically relevant to the American West collection:

Site	URL
Agricola	<a href="http://agricola.nal.usda.gov/">http://agricola.nal.usda.gov/</a>
American Anthropology Association	<a href="http://agricola.nal.usda.gov/">http://agricola.nal.usda.gov/</a>
American Memory	<a href="http://memory.loc.gov/">http://memory.loc.gov/</a>
Bancroft Collection	<a href="http://bancroft.berkeley.edu/collections/bancroft.html">http://bancroft.berkeley.edu/collections/bancroft.html</a>
Bureau of Reclamation	<a href="http://www.usbr.gov/">http://www.usbr.gov/</a>
California Historical Society	<a href="http://www.calhist.org/">http://www.calhist.org/</a>
Colorado Historical Newspapers	<a href="http://www.cdpheritage.org/newspapers/">http://www.cdpheritage.org/newspapers/</a>
De Anza (Univ. of Oregon)	?
Denver Public / Western History	<a href="http://photoswest.com/">http://photoswest.com/</a>
Eastman Collection	<a href="http://www.eastmanhouse.org/">http://www.eastmanhouse.org/</a>
FDA	<a href="http://www.fda.gov/">http://www.fda.gov/</a>
Fullerton Oral Histories	<a href="http://ohp.fullerton.edu/">http://ohp.fullerton.edu/</a>
Getty Collection	<a href="http://www.getty-images.com">http://www.getty-images.com</a>
HNET	<a href="http://www.h-net.org/">http://www.h-net.org/</a>
History Channel	<a href="http://www.historychannel.com/">http://www.historychannel.com/</a>
JSTOR	<a href="http://www.jstor.org/">http://www.jstor.org/</a>
Los Angeles Times	<a href="http://www.latimes.com/">http://www.latimes.com/</a>
Magic Lantern Slides (UC-Berkeley)	<a href="http://geoimages.berkeley.edu">http://geoimages.berkeley.edu</a>
NAACP papers	?
Office of Historic Preservation	<a href="http://ohp.parks.ca.gov/">http://ohp.parks.ca.gov/</a>
Project Muse	<a href="http://muse.jhu.edu/">http://muse.jhu.edu/</a>

Russell Lee Collection (UT -Austin)	<a href="http://www.library.swt.edu/swwc/wg/exhibits/rlee/">http://www.library.swt.edu/swwc/wg/exhibits/rlee/</a>
Society for Historical Anthropology	<a href="http://www.sha.org/">http://www.sha.org/</a>
Web of Science	<a href="http://www.isiwebofknowledge.com/">http://www.isiwebofknowledge.com/</a>

## ***Audience-specific findings***

Given the wide range of users interviewed, it should come as no surprise that we encountered a diversity of behaviors and expectations among audiences. The following sections describe the key findings for each of the separate audience groups:

### **K-12 Teachers/Media Specialists**

Classroom teachers and school media specialists are increasingly incorporating online teaching aids into class assignments, using interactive learning aids such as quizzes, games and “homework helpers”; and relying less on textbooks. But they find themselves hindered by education funding cuts, limited access to computers and out of date equipment.

Teachers often use Web search engines to look for teaching material such as lesson plans, images, and assignments that they can reuse or adapt as needed. Usually pressed for time in preparing for class, they are far less interested in “doing research” than in quickly locating a few useful, high-quality teaching materials. Search features are less important to them than the ability to browse the site easily and find pre-screened, selected content appropriate for a particular subject and grade level.

To drive classroom adoption, participants felt it was critical that the American West project appeal to K-12 students with fun, visually engaging material.

Among the features and considerations that seemed to resonate most with the K-12 audience:

- **Subject guides**  
K-12 users also place a high premium on editorial content and the availability of well-written, age-appropriate subject guides to the collection.
- **Search**  
Although they expected search tools to be available, these users felt that search would be of secondary importance for K-12 students, who would be more likely to browse topics than perform detailed searching.
- **Publishing tools**  
Teachers frequently create online lesson plans, using a range of tools from Dreamweaver to “homegrown” HTML. If the American West collection included a sufficiently robust teaching component, they would consider using it to create online subject guides for their classes.
- **Community features**  
Some participants expressed interest in the idea of a “teacher’s forum” for

exchanging recommendations, lesson plans, and comparing their experiences.

- **Educational standards**

Although educational standards are playing an increasingly important role in classroom teaching, teachers interviewed cautioned against taking educational standards too literally; they still exert considerable leeway in selecting their classroom materials, and did not voice any expectation that the American West site would necessarily align itself around educational standards per se.

- **Reading levels**

Teachers did feel it would be useful to screen materials (especially written materials) by student reading level, but cautioned against taking a simplistic approach of trying to sort materials by grade. One teacher suggested considering the “Lexile” rating system (e.g. 600-800); others would prefer categorization by elementary/middle/high school.

- **Technology in the classroom**

Although technology infrastructure varies widely between schools, most of the teachers interviewed relied on a common set of software tools including Powerpoint, Word and of course Web browsers.

*Note: All K-12 teachers and media specialist participants were recruited from elementary and middle schools in Colorado; high school teachers were not represented in this sample.*

## **Public Librarians**

Public librarian participants were recruited from three Colorado libraries with strong local history collections: Boulder, Denver and Douglas County. Unsurprisingly, this sample group had a strong professional affinity with the subject matter of the American West collection; we should not assume that all of these findings would pertain to all public librarians.

Participants expressed strong enthusiasm for the project and indicated a readiness to add the American West site to their virtual collections, either via online subject guides and as a catalog entry in their local OPACs.

When asked how they would expect to find out about a new online resource, frequently mentioned resources included state library agency mailings, LISTSERVs and word-of-mouth.

The features of most interest to public librarians included:

▪ **Search**

Interviewees suggested that many of their patrons come to public libraries looking for a specific content type – e.g. photos – and/or location. Therefore, they felt it was critical that the search feature support the ability to limit searches by content type and location (preferably at the same time). For example, to find photos of a particular hotel in Boulder.

▪ **Pathfinders/Subject Guides**

All of the librarians interviewed said their libraries maintained some form of pathfinder materials, usually online. These are typically “homegrown” solutions hosted on a local library Web server. While librarians said they would likely add the



American West collection to their virtual collections, there was limited interest in using the American West site to create subject guides or integrated it into a local federated search environment.

- **Local collections**

Several librarians expressed a strong interest in contributing their local collections, and expressed an interest in finding out how they could participate. Several librarians interviewed went a step further, indicating a willingness to participate more actively in building the American West collection. Librarians in Boulder, Denver and Douglas county all expressed a strong interest in opening up their local collections, which they are actively engaged in digitizing. Among the collections identified:

- Old West Photos (Denver Public)
- Local History (Boulder, Douglas Co.)
- Oral history collections (Boulder)

## Graduate Students

As specialized academic researchers with a strong interest in primary source materials - and a high comfort level with online research - we believe that graduate students should be considered a primary target group for the American West project.

- **Search**

Graduate students are primarily interested in search tools, especially the ability to look for primary source materials in a particular discipline. They also want to download/save search results easily and add to their personal collections (typically stored locally on their PCs)

- **Images**

Several participants were building large personal image collections as part of their research efforts, frequently using Google image search or other photo/image collections. In all cases, participants had developed local ad hoc systems for managing their collections.

- **Citation management**

Students exhibited a wide disparity in styles and approaches to note-taking and citation management, typically using a combination of paper notes, Microsoft Word and other ad hoc methods for managing research. Although use of citation management software was limited, graduate students nonetheless spend considerable time working with long-term research projects and developing extensive bibliographies. Most users expressed a strong interest in the ability to generate and export citations.

- **Citation capture**

Participants voiced strong interest in the ability to save references in a running list that could then be exported via email, "save as" or potentially integrated into citation management software.

- **Alerts**

Given the long-term nature of graduate research, several students expressed interest in the ability to set up notifications when new items match a saved search term.

- **Ask a Librarian**

Almost all students had consulted personally with a librarian at some point in formulating research strategies. Graduate students place a high premium on access to personal, individualized research support from librarians or other subject experts.

These participants expressed less enthusiasm for subject guides or pathfinders (given the specialized nature of their research interests), and almost no interest in the ability to publish or annotate collections, since they typically feel protective of their research in progress.

## **Faculty**

Given their diverging and highly specialized research interests, and widely varying use of technology, we are hesitant to draw broad conclusions about faculty research behaviors.

Most of the faculty members interviewed already have well-established research habits and preferred sources; and tend to rely less on the Web for academic research than other groups interviewed. As such, we believe that faculty members may constitute a secondary audience for the American West project.

We did, however, discover a few consistent themes:

- **Personal collections**

Several faculty members maintain large personal collections of images, audio recordings and other primary source materials that they have generated or collected themselves. Typically, they maintain these collections using ad hoc systems such as directory folders or Excel spreadsheets. Faculty who have made significant time investments in these collections express reluctance to switch to other management tools without a strong incentive in terms of either productivity or improved access.

- **"Proxy" research**

In several cases, faculty rely on graduate students or research assistants to perform secondary literature research, often assigning a research topic and asking their students to write a *précis* or summary of research findings. This pattern of distributed research suggests the importance of allowing users to export or email citations to colleagues.

- **Citation management software**

Although the faculty we interviewed regularly publish and maintain large collections of citations and research, we found limited use of citation management software.

- **Local collections**

Many faculty have spent their entire careers developing their own research collections, often consisting of field work or other primary source material. Several faculty expressed strong interest in learning how they could contribute their own collections to the American West meta-collection.

## **Academic Librarians**

Academic librarians (drawn primarily from UC campuses) demonstrate a level of expertise on collections and cataloging issues that make them atypically expert users. They do, however, provide a crucial perspective in understanding how the American West collection might fit within a University research environment.

- **Cataloging Web resources**  
Academic libraries typically do not catalog free Web-based resources in their library catalogs (OPACS); more frequently, they reference public Web sites via local subject guides or pathfinders, typically served via the library Web site.
- **Integration issues**  
Academic librarians expressed hesitation at the prospect of integrating American West into their local catalogs or metasearch collections unless there was a clear benefit to their institution (for example, if they could incorporate their own local collections and take advantage of CDL's search infrastructure to do so).
- **Primary source material**  
In general, academic librarians saw primary source materials as the main value proposition of the American West collection; they believe that book and journal literature is already well covered in other existing resources.

## Community Colleges

Community college teachers rely heavily on Web-based teaching and research tools, especially given limited library facilities (in some cases, community colleges rely on public libraries), and lack of access to licensed journal databases.

Community college teachers wear two hats: often they have advanced degrees and deep research interests in specialized fields; yet they also have to teach general subjects in their fields (e.g. History): as well as "life skills" that form an essential part of the community college mission.

Participants expressed particular interest in the following topics:

- **Teaching aids**  
Like K-12 teachers, community college teachers also assign high value to teaching aids such as lesson plans, interactive features and other learning modules. They would like to be able to filter the collection to weed out age-inappropriate material.
- **Distance learning**  
Many participants reported a growing involvement with distance learning classes, which naturally lend themselves to the use of Web-based teaching materials.
- **Primary source material**  
Given their lack of access to strong research collections (especially in rural areas), community college teachers place an extremely high premium on access to digital primary source materials.
- **Multimedia**  
Community college teachers also express a high interest level in audio-video and interactive features that they can use to engage students in the classroom (for example, showing *Monty Python* clips to introduce history topics).

## Recommendations

Based on these interview findings, we have formulated the following key recommendations for the American West project:

### **1. Develop separate gateways for academic research vs. classroom teaching and general interest usage**

Given the evident gaps in user needs and expectations between academic researchers and teachers/general interest users, we strongly recommend developing separate gateways for these distinct usage models:

- **Scholarly research**  
An expert environment for researchers, allowing them to perform advanced search, track and manage citations, create custom views of the collection, and other tools to support the research and publishing process
- **Classroom teaching and general interest**  
Geared towards classroom and general interest use, the emphasis here should be on interactive learning features, an easily browsable subject tree, access to teaching aids and annotated subject guides

### **2. Search**

All users expect search as a base feature of any online research source. Most users voiced a strong preference for simple, Google-like search input forms. Several users also expressed a desire to limit their searches by key parameters, including:

- Format (e.g. photos, maps)
- Date range
- Geographic location
- Collection

It may be appropriate to surface these additional search parameters in a separate "Advanced Search" form.

Additional search features to consider include:

- **Search history**  
Make previous search terms visible, to help users keep track of queries during a session
- **"Search within these results"**  
Allowing users to expand/constrain sources using a previous query term
- **Discoverability of controlled vocabularies**  
Expose metadata (e.g. subject headings, keyword lists) in search results as well as in individual item displays

### **3. Interactive features**

Especially for teaching and general interest usage, engage users by creating rich, immersive learning tools. Potential interactive features could include:

- Interactive maps and timelines
- Narrated slideshows
- “Learning objects” (similar to those used in distance learning environments)

#### **4. Citation management / publishing tools**

Although use of citation management software (such as Endnote and Refworks) appears limited, users nonetheless expressed interest in the ability to export and save citations for future reference, and to create personal views of the collection.

Features to consider include:

- **“Shopping basket”**  
Ability to save items/citations in a list, and assign items to a particular project or user-assigned topic
- **Publishable views**  
Allowing registered users to create and publish views of the collection visible to other users
- **Citation export**  
Ability to email or save citations in popular formats (e.g. MLA, APA)

#### **5. Additional Features**

During the interviews, we also identified several additional features that were of interest to some users. These should be considered second-tier priorities, but could merit further scoping and resource prioritization:

- **Ask a Librarian**  
Direct access to a live librarian for research help
- **Alerts**  
Ability to set up email notifications for new search term matches
- **Community features**  
Such as discussion boards and mailing lists
- **Courseware integration**  
e.g., with WebCT, Blackboard, others tbd

## **APPENDIX I: Interview Notes**

[For privacy reasons the interview notes have been removed]

# APPENDIX II: Moderator's Scripts

---

## Moderator's Script – Faculty members

---

### I Introductions

The California Digital Library (CDL) needs your help in creating a new resource (funded through a Hewlett Foundation grant) that will bring together digital resources related to the American West from six institutions across the US, including the Library of Congress.

We are conducting interviews with faculty, students, and librarians to help us understand user needs and interests, to help us ensure that this new service is both usable and useful for research.

Thank you for agreeing to participate in this interview today. Your participation is completely anonymous; your name will not be used in the final report.

First, tell us a little about yourself:

#### Participant 1

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Field: \_\_\_\_\_

#### Participant 2

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Field: \_\_\_\_\_

### II General Research Habits

Tell us about your current research interests:

- What is your field of study/expertise?
- What projects are you currently working on?

What do you consider the most valuable/useful sources in your field? What do you like/dislike about those sources?

Which research sources do you rely on most often? e.g.:

- Library catalogs
- Web search engines (Google)

- Journal article indexes or is it indices such as [insert some names]
- State virtual/digital collections
- Museum collections
- Online journals
- Photo archives
- News archives

How do you find out about new research sources?

What are some of the “artifacts” you typically create, e.g.:

- Thesis
- Research papers
- Scholarly articles
- Books
- Lectures
- Lesson plans

When you are conducting research for a particular project, how do you manage that process?

- How do you keep track of citations/references?
- How do you take notes?
- Do you often collaborate with colleagues (e.g. grad students/faculty)

Where are you physically when you conduct research?

- Home / apartment
- Library
- Faculty office
- Other campus location
- In the field

Think of a recent project where you had to conduct research? Tell us about the process:

- What sources did you use?
- Did you rely solely on online sources, or did you also use books, journals or other print material?
- Did you consult a librarian?
- Who else did you ask for help? (e.g., colleagues, a professor)
- Did you find what you were looking for?
- What kinds of challenges or difficulties did you encounter?

When you are conducting a search, do you sometimes get too many results? How do you winnow the results down to a manageable list?

When you are conducting research, what are some of the most important considerations in evaluating a set of results e.g.:

- Primary vs. secondary sources
- Time/date

How do you assess the quality of a research source? e.g.:

- Institutional provenance
- Professional design/look-and-feel



- Relevance of search results
- Recommendation of colleagues
- citation

Are you involved in creating digital content, e.g.:

- Blackboard lesson plans
- Other instructional software
- Presentations
- Web sites
- Blogs/Wikis

Do you have your own “personal collection” of digital and/or analog materials (analog –eg slides, video?). If so, how do you manage it? What tools do you use? Do you export or create metadata (e.g. for images)

How could an online research source facilitate that process?

How have online resources impacted your teaching experience?

Do you often need to deal with legal or copyright issues like permissions?

How does the process of managing ongoing research differ from more focused research (e.g. for an article or paper)?

What types of tools would help support longer-term research efforts, e.g.:

- Storing citations and references
- Creating personal collections or “views” of collections
- “Alerts” or notifications of new search results based on saved queries

What considerations would influence you to start using a new source for your research? e.g.:

- Quality of collection
- Availability of multimedia content
- Ability to create and publish content to the collection
- Project management features

### III “Blue Sky”

In a perfect world, what kinds of research services would you like to see for a research service devoted to the American West?

- Cross-database searching?
- Integration of Web content and library catalogs?
- Topic guides
- Abstracts
- Bibliography/citation tools
- Create personal collections
- Annotate or rate content
- Save searches for future reference

If there were a service that offered better search results than the services you currently use, would you be willing to wait for the results? How long?

Think about an ideal research tool. Now, tell us about it.

#### **IV Concept Testing**

At the conclusion of the test session, we will show users preliminary wireframes of the proposed Personal Library Manager user interface.

Assume there is a service that allows you to keep gather, manage, and share items in your personal library.

- Items may be citations or, for digital objects, citations plus the actual files (e.g., MS Word or PDF documents, JPG images, PowerPoint presentations, HTML pages).
- This service would also allow you to create new items (e.g., documents, presentations, photo albums, bibliographies, web sites) out of the items in your personal collection.

[Ask them to describe what it might look like.]

[Prompt with screen mockups and wireframes]

[Ask what they like and don't like about the screen mockups and wireframes]

Does this type of service sound appealing to you? Why or why not? If it was offered free to you, would you use it? Why or why not?

What tools (software, web sites, etc.) do you currently use to perform these functions?

Where are your most common frustrations in using these types of tools

How would the PLM work with your existing information seeking workflow (scraps of paper, email, citation manager, etc.)

Do you want to search databases from within the PLM interface? Or bring items into the PLM? Both?

Do you see the PLM as:

- a web site
- part of your web browser
- a separate piece of software on your computer
- part of another piece of software on your computer (part of the software you use to read email or manage your tasks? part of a word processor?)

If there were templates for output, would you use them? How ugly is too ugly? Would you want to be able to create/apply your own template (e.g., Microsoft Office "Style Manager", HTML/CSS template for your website)? Who would actually do this work?

PLM is an awful name. What would you call it?

How important is it that the PLM have the following functionality?

Very Important | Important | Unimportant | No opinion

#### **1. Search for items**

- 1.1. Ability to search multiple types of databases from within the PLM interface

- 2. Gather/collect citations**
  - 2.1. Ability to select citation(s) to bring into the PLM
- 3. Gather/collect documents, image files, multimedia files**
  - 3.1. Ability to select document(s) to bring into the PLM
  - 3.2. Ability to select image file(s) to bring into the PLM
  - 3.3. Ability to select audio/video file(s) to bring into the PLM
  - 3.4. Ability to have the PLM be able to hyperlink to items/folders on your hard drive or shared drive or to URLs on the Internet
- 4. Use and manipulate items**
  - 4.1. Ability to manipulate items for analysis (pan/zoom/crop images; graph and model data, etc.)
  - 4.2. Ability to “write in the margins” electronically
- 5. Manage items**
  - 5.1. Ability to annotate with your own notes or catalog items for your own needs
  - 5.2. Ability to search the full text of items in your personal collection
  - 5.3. Ability to verify/obtain copyright clearance for items in your collection
  - 5.4. Ability to compare your personal collection to those of others (e.g., colleagues, librarians)
- 6. Author new, derivative items**
  - 6.1. Ability to create a photo album or slideshow of images in your collection
  - 6.2. Ability to create a bibliography, footnotes, a reference list, or a pathfinder from citations in your collection
  - 6.3. Ability to create online exhibits or sets of web pages that provide access to your personal collection
  - 6.4. Ability to create interactive lessons with information, quizzes, links to items, etc.
- 7. Publish or export items**
  - 7.1. Ability to export citations to word processors in the correct citation style (or to export citations to citation managers such as Endnote)
  - 7.2. Ability to export items to course web sites, digital libraries, learning object repositories, etc.
  - 7.3. Ability to apply style sheets (choose templates) for each output format. [Which ones?]
  - 7.4. Ability to create (and then apply) your own style sheet/template [Which ones?]

Of the issues you rated as “Very Important”, which are the overall top three?

---

## Moderator's script - Librarians

---

### I Introductions

The California Digital Library (CDL) needs your help in creating a new resource (funded through a Hewlett Foundation grant) that will bring together digital resources related to the American West from six institutions across the US, including the Library of Congress.

We are conducting interviews with faculty students, and librarians to help us understand user needs and interests, to help us ensure that this new service is both usable and useful for research.

Thank you for agreeing to participate in this interview today. Your participation is completely anonymous; your name will not be used in the final report.

First, tell us a little about yourself:

#### Participant 1

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Field: \_\_\_\_\_

#### Participant 2

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Field: \_\_\_\_\_

### II General Behaviors

First, tell us about your role as a librarian:

- What are your primary job responsibilities?
- Do you have a particular subject expertise?
- What audiences does your library serve?

Which of the following online sources do you (as opposed to your patrons) commonly use?

- OPAC
- Web search engines (Google)
- Journal article indexes or is it indices such as [insert some names]
- State virtual/digital collections
- Museum collections
- Online journals

- Photo archives
- News archives

How do you find out about new research sources?

Are you involved in creating any of the following types of “artifacts”?

- Pathfinders
- Bibliographies
- Exhibit displays
- Presentations
- Scholarly articles
- Books

Have you created content using digital collections, e.g. using audio-video or image content? If so, how did you manage that process?

What are your preferred file formats, e.g.:

- Photo album or slideshow (HTML, Powerpoint, etc.)
- Presentation (Powerpoint, Flash, etc.)
- Document (MS Word, OpenOffice.org Write, etc.)
- Citation Manager (EndNote, BibTeX, etc.)
- Syllabus, course web page (WebCT, Blackboard, etc.)
- Web site (HTML, etc.)

When evaluating a new online research source, what are some of the most important considerations?

- Primary vs. secondary sources
- Institutional provenance
- Professional design/look-and-feel
- Relevance of search results
- Recommendation of colleagues

Based on your experience, what types of formats would be most valuable to your patrons/users?

- Citations
- Articles
- Books
- Images
- Audio-video

Would you like to be able to create “private label” views of collections (i.e. branded with your library/institution’s look-and-feel)?

How would you like to see a service like American West integrated into your current collections? e.g.:

- OPAC integration
- Library Web site
- Stand-alone “kiosk”

Would you like to be able to add local content or collections?

If there were an administrative interface that helped you harvest and federate available sources to create your own local views, would you be interested in using such a tool?

- Would you prefer a simple Web interface with less control, or an “expert” interface (e.g. command-line) with more control?
- How much customization would you want to perform, e.g. interface design and page layout?

How important is access to information about copyright and legal permissions?

What experiences have you had in the past with new online collections or database tools? What lessons could we learn from your experience?

### III “Blue Sky”

In a perfect world, what kinds of research services would you like to see for a research service devoted to the American West?

- Cross-database searching?
- Integration of Web content and library catalogs?
- Topic guides
- Abstracts
- Bibliography/citation tools
- Create personal collections
- Annotate or rate content
- Save searches for future reference

If there were a service that offered better search results than the services you currently use, would you be willing to wait for the results? How long?

Think about an ideal research tool. Now, tell us about it.

### IV Concept Testing

At the conclusion of the test session, we will show users preliminary wireframes of the proposed Personal Library Manager user interface.

Assume there is a service that allows you to keep gather, manage, and share items in your personal library.

- Items may be citations or, for digital objects, citations plus the actual files (e.g., MS Word or PDF documents, JPG images, PowerPoint presentations, HTML pages).
- This service would also allow you to create new items (e.g., documents, presentations, photo albums, bibliographies, web sites) out of the items in your personal collection.

[Ask them to describe what it might look like.]

[Prompt with screen mockups and wireframes]

[Ask what they like and don't like about the screen mockups and wireframes]

Does this type of service sound appealing to you? Why or why not? If it was offered free to you, would you use it? Why or why not?

What tools (software, web sites, etc.) do you currently use to perform these functions?

Where are your most common frustrations in using these types of tools

How would the PLM work with your existing information seeking workflow (scraps of paper, email, citation manager, etc.)

Do you want to search databases from within the PLM interface? Or bring items into the PLM? Both?

Do you see the PLM as:

- a web site
- part of your web browser
- a separate piece of software on your computer
- part of another piece of software on your computer (part of the software you use to read email or manage your tasks? part of a word processor?)

If there were templates for output, would you use them? How ugly is too ugly? Would you want to be able to create/apply your own template (e.g., Microsoft Office "Style Manager", HTML/CSS template for your website)? Who would actually do this work?

PLM is an awful name. What would you call it?

How important is it that the PLM have the following functionality?

Very Important | Important | Unimportant | No opinion

## 8. Search for items

8.1. Ability to search multiple types of databases from within the PLM interface

## 9. Gather/collect citations

9.1. Ability to select citation(s) to bring into the PLM

## 10. Gather/collect documents, image files, multimedia files

10.1. Ability to select document(s) to bring into the PLM

10.2. Ability to select image file(s) to bring into the PLM

10.3. Ability to select audio/video file(s) to bring into the PLM

10.4. Ability to have the PLM be able to hyperlink to items/folders on your hard drive or shared drive or to URLs on the Internet

## 11. Use and manipulate items

11.1. Ability to manipulate items for analysis (pan/zoom/crop images; graph and model data, etc.)

11.2. Ability to "write in the margins" electronically

## 12. Manage items

12.1. Ability to annotate with your own notes or catalog items for your own needs

12.2. Ability to search the full text of items in your personal collection

12.3. Ability to verify/obtain copyright clearance for items in your collection

12.4. Ability to compare your personal collection to those of others (e.g., colleagues, librarians)

## 13. Author new, derivative items

13.1. Ability to create a photo album or slideshow of images in your collection

13.2. Ability to create a bibliography, footnotes, a reference list, or a pathfinder from citations in your collection

13.3. Ability to create online exhibits or sets of web pages that provide access to your personal collection

13.4. Ability to create interactive lessons with information, quizzes, links to items, etc.

## 14. Publish or export items

14.1. Ability to export citations to word processors in the correct citation style (or to export citations to citation managers such as Endnote)

14.2. Ability to export items to course web sites, digital libraries, learning object repositories, etc.

14.3. Ability to apply style sheets (choose templates) for each output format. [Which ones?]

14.4. Ability to create (and then apply) your own style sheet/template [Which ones?]

Of the issues you rated as "Very Important", which are the overall top three?





---

## Moderator's script - K-12 Teachers and Media Specialists

---

### I Introductions

The California Digital Library (CDL) needs your help in creating a new resource (funded through a Hewlett Foundation grant) that will bring together digital resources related to the American West from six institutions across the US, including the Library of Congress.

We are conducting interviews with teachers, students, and librarians to help us understand user needs and interests, to help us ensure that this new service is both usable and useful for research.

Thank you for agreeing to participate in this interview today. Your participation is completely anonymous; your name will not be used in the final report.

First, tell us a little about yourself:

#### Participant 1

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Field: \_\_\_\_\_

#### Participant 2

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Field: \_\_\_\_\_

### II General Research Habits

When you are putting together a class curriculum, what are your main considerations? e.g.:

- Age-appropriateness of subject matter
- Student reading level
- Primary vs. secondary sources
- Educational standards

How much time do you spend conducting your own research in preparing a topic for class?

What role do online sources play in your teaching experience? Do you feel pressure to use digital (as opposed to print) material?

How do you present material to your students:

- In class
- Presentation (e.g. Powerpoint)

- Online
- Print
- Other formats

Are you involved in developing online learning materials?

Which research sources do you rely on most often? e.g.:

- Library catalogs
- Web search engines (Google)
- Journal article indexes or is it indices such as [insert some names]
- State virtual/digital collections
- Museum collections
- Online journals
- Photo archives
- News archives

How do you find out about new sources?

When you are conducting research for a particular project, how do you manage that process?

- How do you keep track of citations/references?
- How do you take notes?
- Do you often collaborate with colleagues?

Do you have your own “personal collection” of digital and/or analog materials (analog –eg slides, video?). If so, how do you manage it? What tools do you use? Do you export or create metadata (e.g. for images)

Where are you physically when you conduct research?

- Home / apartment
- Library
- Faculty office
- Other campus location
- In the field

Think of a recent project where you had to conduct research? Tell us about the process:

- What sources did you use?
- Did you rely solely on online sources, or did you also use books, journals or other print material?
- Did you consult a librarian?
- Who else did you ask for help? (e.g., colleagues, a professor)
- Did you find what you were looking for?
- What kinds of challenges or difficulties did you encounter?

When you are conducting a search, do you sometimes get too many results? How do you winnow the results down to a manageable list?

When you are conducting research, what are some of the most important considerations in evaluating a set of results e.g.:

- Primary vs. secondary sources
- Time/date

How do you assess the quality of a research source? e.g.:

- Institutional provenance
- Professional design/look-and-feel
- Relevance of search results
- Recommendation of colleagues
- citation

What considerations would influence you to start using a new source? e.g.:

- Quality of collection
- Availability of multimedia content
- Ability to create and publish content to the collection
- Project management features

How has the rising influence of educational standards affected your work? Do you feel more pressure to “teach to the standards”?

If a new service could generate results “filtered” according to educational standards, would that be useful?

Would you like to be able to see what other teachers have found useful in teaching a particular subject?

Would you like to be able to comment/annotate a source for other teachers to see?

### III “Blue Sky”

In a perfect world, what kinds of research services would you like to see for a research service devoted to the American West?

- Cross-database searching?
- Integration of Web content and library catalogs?
- Topic guides
- Abstracts
- Bibliography/citation tools
- Create personal collections
- Annotate or rate content
- Save searches for future reference

If there were a service that offered better search results than the services you currently use, would you be willing to wait for the results? How long?

Think about an ideal research tool. Now, tell us about it.

### IV Concept Testing

At the conclusion of the test session, we will show users preliminary wireframes of the proposed Personal Library Manager user interface.

*Assume there is a service that allows you to keep gather, manage, and share items in your personal library.*

- *Items may be citations or, for digital objects, citations plus the actual files (e.g., MS Word or PDF documents, JPG images, PowerPoint presentations, HTML pages).*
- *This service would also allow you to create new items (e.g., documents, presentations, photo albums, bibliographies, web sites) out of the items in your personal collection.*

[Ask them to describe what it might look like.]

[Prompt with screen mockups and wireframes]

[Ask what they like and don't like about the screen mockups and wireframes]

*Does this type of service sound appealing to you? Why or why not? If it was offered free to you, would you use it? Why or why not?*

*What tools (software, web sites, etc.) do you currently use to perform these functions?*

*Where are your most common frustrations in using these types of tools*

*How would the PLM work with your existing information seeking workflow (scraps of paper, email, citation manager, etc.)*

*Do you want to search databases from within the PLM interface? Or bring items into the PLM? Both?*

*Do you see the PLM as:*

- *a web site*
- *part of your web browser*
- *a separate piece of software on your computer*
- *part of another piece of software on your computer (part of the software you use to read email or manage your tasks? part of a word processor?)*

*If there were templates for output, would you use them? How ugly is too ugly? Would you want to be able to create/apply your own template (e.g., Microsoft Office "Style Manager", HTML/CSS template for your website)? Who would actually do this work?*

*PLM is an awful name. What would you call it?*

*How important is it that the PLM have the following functionality?*

Very Important | Important | Unimportant | No opinion

## **15. Search for items**

15.1. Ability to search multiple types of databases from within the PLM interface

## **16. Gather/collect citations**

16.1. Ability to select citation(s) to bring into the PLM

## **17. Gather/collect documents, image files, multimedia files**

17.1. Ability to select document(s) to bring into the PLM

17.2. Ability to select image file(s) to bring into the PLM

17.3. Ability to select audio/video file(s) to bring into the PLM

17.4. Ability to have the PLM be able to hyperlink to items/folders on your hard drive or shared drive or to URLs on the Internet

## **18. Use and manipulate items**

18.1. Ability to manipulate items for analysis (pan/zoom/crop images; graph and model data, etc.)

18.2. Ability to "write in the margins" electronically

## **19. Manage items**

19.1. Ability to annotate with your own notes or catalog items for your own needs

- 19.2. Ability to search the full text of items in your personal collection
- 19.3. Ability to verify/obtain copyright clearance for items in your collection
- 19.4. Ability to compare your personal collection to those of others (e.g., colleagues, librarians)

**20. Author new, derivative items**

- 20.1. Ability to create a photo album or slideshow of images in your collection
- 20.2. Ability to create a bibliography, footnotes, a reference list, or a pathfinder from citations in your collection
- 20.3. Ability to create online exhibits or sets of web pages that provide access to your personal collection
- 20.4. Ability to create interactive lessons with information, quizzes, links to items, etc.

**21. Publish or export items**

- 21.1. Ability to export citations to word processors in the correct citation style (or to export citations to citation managers such as Endnote)
- 21.2. Ability to export items to course web sites, digital libraries, learning object repositories, etc.
- 21.3. Ability to apply style sheets (choose templates) for each output format. [Which ones?]
- 21.4. Ability to create (and then apply) your own style sheet/template [Which ones?]

Of the issues you rated as “Very Important”, which are the overall top three?