

Appendix C Reference Questions Statistics

FY 2014

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Reference	31	15	59	68	56	41	47	50	56	64	34	33	554
Directional	3	0	11	12	7	6	9	7	5	12	6	3	81
Comp/General	1	4	45	12	8	10	10	14	8	17	10	5	144
Comp/Instruct	2	0	13	10	6	6	14	10	8	10	5	0	84
Total	37	19	128	102	77	63	80	81	77	103	55	41	863

FY 2013

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Reference	38	48	74	90	83	47	32	39	82	76	62	10	681
Directional	5	4	12	8	5	7	3	7	12	7	7	2	79
Comp/General	1	8	9	12	4	7	6	14	9	13	13	0	96
Comp/Instruct	2	0	11	12	5	5	3	7	7	8	7	0	67
Total	46	60	106	122	97	66	44	67	110	104	89	12	923

FY 2012

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Reference	22	38	90	103	108	48	40	64	64	73	47	37	734
Directional	6	1	10	13	7	2	1	7	1	1	5	1	55
Comp/General	5	1	16	9	23	7	5	14	10	20	10	7	127
Comp/Instruct	0	6	18	7	10	4	3	9	5	12	3	2	79
Total	33	46	134	132	148	61	49	94	80	106	65	47	995

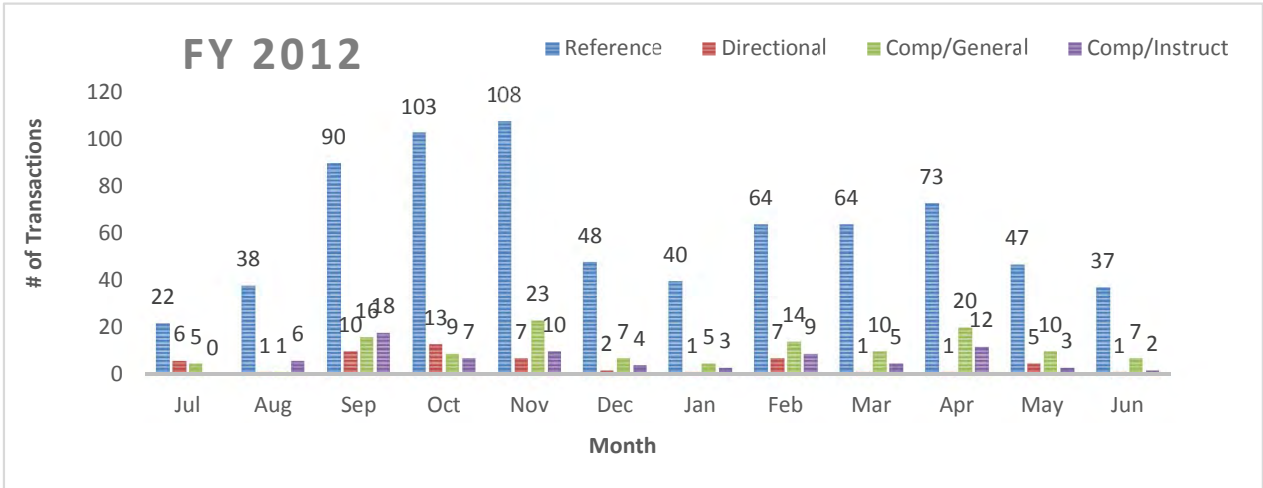
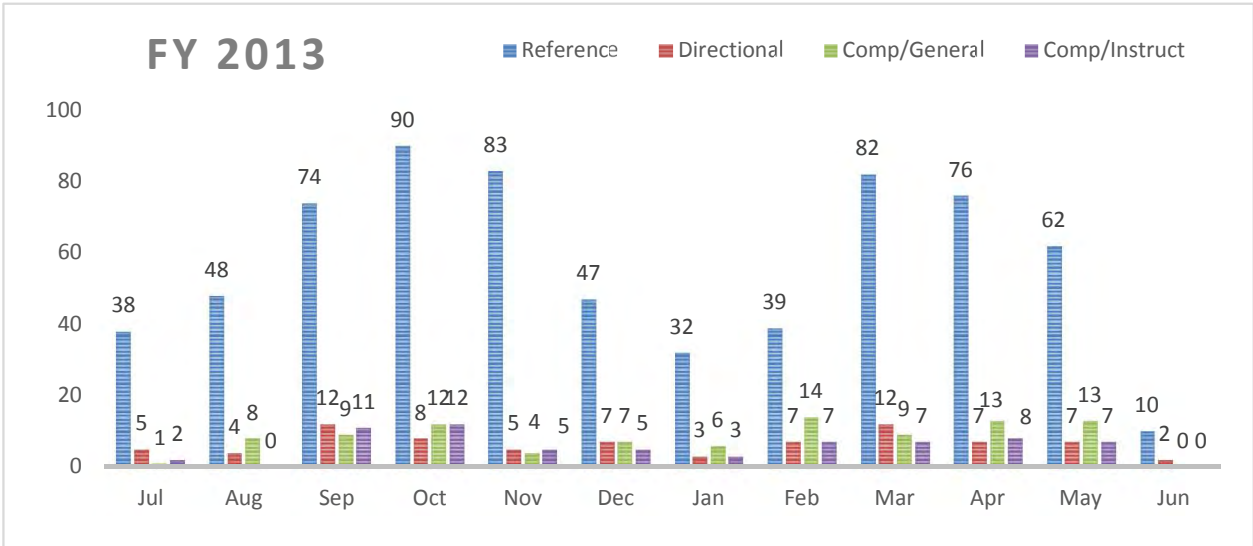
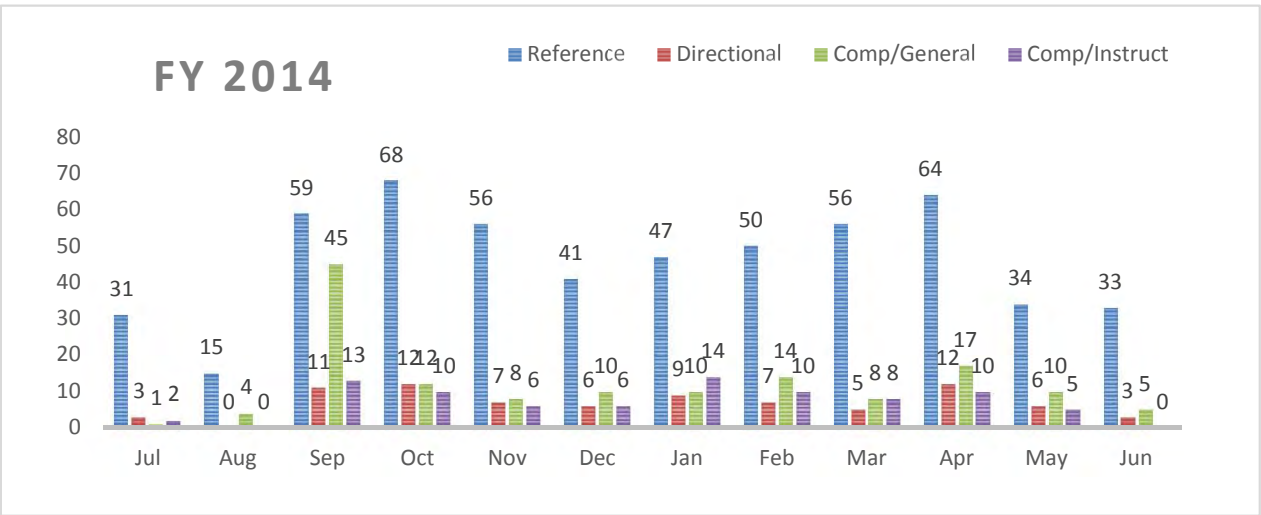
FY 2011

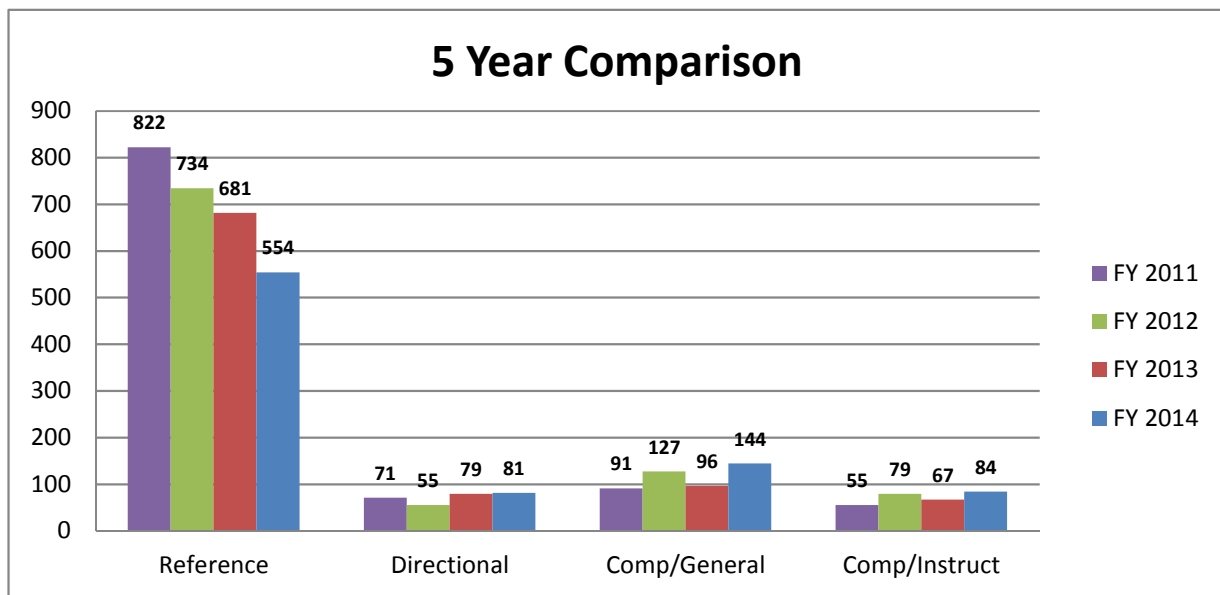
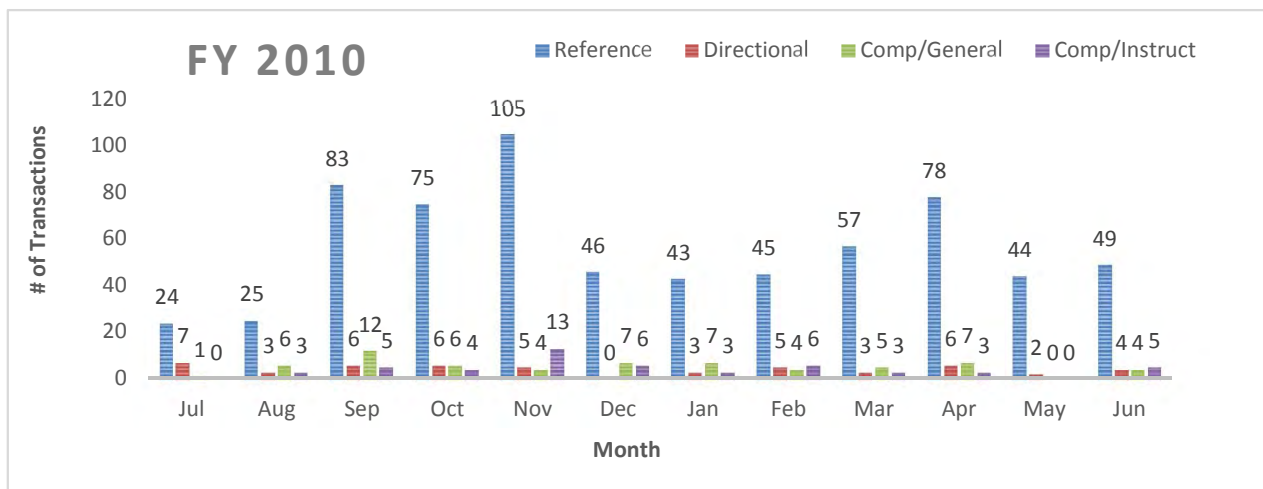
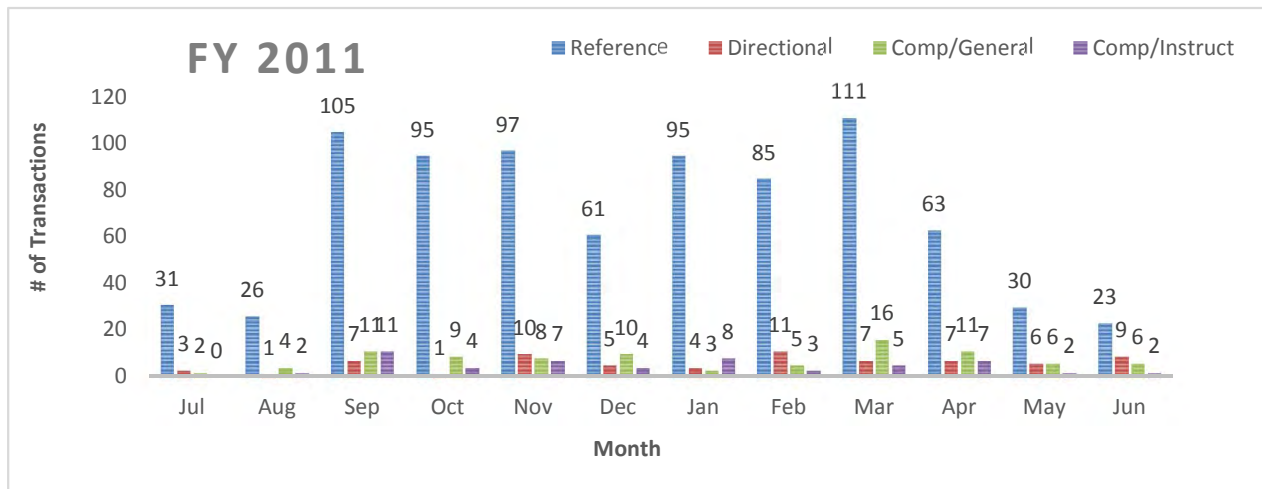
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Reference	31	26	105	95	97	61	95	85	111	63	30	23	822
Directional	3	1	7	1	10	5	4	11	7	7	6	9	71
Comp/General	2	4	11	9	8	10	3	5	16	11	6	6	91
Comp/Instruct	0	2	11	4	7	4	8	3	5	7	2	2	55
Total	36	33	134	109	122	80	110	104	139	88	44	40	1039

FY 2010

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Reference	24	25	83	75	105	46	43	45	57	78	44	49	674
Directional	7	3	6	6	5	0	3	5	3	6	2	4	50
Comp/General	1	6	12	6	4	7	7	4	5	7	0	4	63
Comp/Instruct	0	3	5	4	13	6	3	6	3	3	0	5	51
Total	32	37	106	91	127	59	56	60	68	94	46	62	838

*Did not include the many times staff showed people how to get to offices in the new Powell bldg.





Computer tallies are broken down by general and instructional type questions. General describes help with printing problems, lost files, disk problems, etc. Instructional describes help with using a software program, scanning, and other help not related to reference (for example, showing someone how to use our online catalog is considered a reference question not computer instruction).

Blake Library Service Points

FY2014

MONTH	SP1 (Circ)			SP2 (TechServ)			SP3 (Cat/Aqui)			SP4 (Serials)			TOTAL										
	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT											
Jul	11	6	14	0	4	1	4	1	0	0	0	0	41										
Aug	12	3	17	0	1	0	11	7	3	5	0	2	61										
Sep	18	39	17	4	1	0	15	15	2	10	2	4	127										
Oct	8	7	4	0	1	0	10	4	2	8	0	0	44										
Nov	11	7	3	0	0	0	8	2	1	9	0	0	41										
Dec	12	13	10	0	1	0	10	1	1	5	0	0	53										
Jan	10	17	17	0	1	0	5	2	0	5	0	0	57										
Feb	13	10	12	0	0	0	10	5	2	2	0	0	54										
Mar	13	13	2	0	0	0	8	5	1	0	0	0	42										
Apr	7	18	7	2	1	0	17	10	5	0	0	0	67										
May	14	9	6	0	4	0	11	1	3	0	0	0	48										
Jun	12	10	7	0	0	0	5	3	0	0	0	0	37										
TOTAL	141	152	116	6	14	1	114	56	20	44	2	6	672										
SP1 TL			409			SP2 TL			21			SP3 TL			190			SP4 TL			52		

Total Gen 305 Ref 224 IT 143

FY2013

MONTH	SP1 (Circ)			SP2 (TechServ)			SP3 (Cat/Aqui)			SP4 (Serials)			TOTAL										
	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT											
Jul	5	11	9	0	0	0	6	1	9	0	0	0	41										
Aug	11	11	8	0	1	2	8	11	7	3	0	5	67										
Sep	33	29	26	3	2	12	34	9	8	18	0	5	179										
Oct	4	13	14	0	3	0	11	7	8	6	0	0	66										
Nov	16	18	9	0	1	0	10	4	4	15	0	0	77										
Dec	10	17	7	0	0	1	5	4	4	20	0	0	68										
Jan	17	19	12	0	2	1	12	5	6	10	0	0	84										
Feb	11	22	7	0	0	0	12	3	1	5	0	3	64										
Mar	13	23	6	0	1	2	15	3	4	5	4	3	79										
Apr	11	13	11	0	6	0	15	2	0	0	0	0	58										
May	11	16	7	0	3	0	12	1	5	0	0	0	55										
Jun	16	7	12	0	3	0	10	2	1	0	0	0	51										
TOTAL	158	199	128	3	22	18	150	52	57	82	4	16	889										
SP1 TL			485			SP2 TL			43			SP3 TL			259			SP4 TL			102		

Total Gen 393 Ref 277 IT 219

FY2012

MONTH	SP1 (Circ)			SP2 (TechServ)			SP3 (Cat/Aqui)			SP4 (Serials)			TOTAL
	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	
Jul	10	13	5	0	0	0	8	1	3	0	0	0	40
Aug	5	12	4	0	0	0	10	10	15	3	0	5	64
Sep	45	32	26	0	3	5	16	8	16	7	2	9	169
Oct	8	14	6	1	2	2	12	4	3	7	2	0	61
Nov	8	17	3	2	4	6	19	4	1	6	1	4	75
Dec	5	11	2	0	3	0	10	14	1	3	1	3	53
Jan	11	19	7	0	1	1	12	18	2	8	0	2	81
Feb	16	20	8	0	2	1	3	11	6	3	0	0	70
Mar	11	17	7	0	3	1	19	11	2	3	0	0	74
Apr	9	12	6	1	4	1	18	6	3	0	0	0	60
May	6	12	7	0	1	0	12	5	2	0	0	0	45
Jun	8	11	11	0	0	0	8	10	3	0	0	0	51
TOTAL	142	190	92	4	23	17	147	102	57	40	6	23	843
SP1 TL			SP2 TL			SP3 TL			SP4 TL				
424			44			306			69				

Total Gen 333 Ref 321 IT 189

FY2011

MONTH	SP1 (Circ)			SP2 (TechServ)			SP3 (Cat/Aqui)			SP4 (Serials)			TOTAL
	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	
Jul	N/A			N/A			N/A			N/a			0
Aug	N/A			N/A			N/A			N/a			0
Sep	N/A			N/A			N/A			N/a			0
Oct	N/A			N/A			N/A			N/a			0
Nov	13	29	3	9	4	2	12	4	5	5	0	2	88
Dec	13	11	3	1	0	0	10	2	1	5	0	1	47
Jan	9	17	26	3	5	4	7	6	5	11	0	2	95
Feb	5	20	9	1	9	2	4	6	5	10	1	4	76
Mar	1	11	11	1	4	2	17	5	4	0	0	2	58
Apr	1	5	6	2	3	1	13	5	0	4	0	1	41
May	3	6	2	5	2	5	16	1	5	0	0	0	45
Jun	6	7	11	1	1	7	9	1	2	0	0	0	45
TOTAL	51	106	71	23	28	23	88	30	27	35	1	12	495
SP1 TL			SP2 TL			SP3 TL			SP4 TL				
228			74			145			48				

Total Gen 197 Ref 165 IT 133

YEAR	SP1 (Circ)			SP2 (TechServ)			SP3 (Cat/Aqui)			SP4 (Serials)			Total
	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	Gen	Ref	IT	
2011*	51	106	71	23	28	23	88	30	27	35	1	12	495
2012	142	190	92	4	23	17	147	102	57	40	6	23	843
2013	158	199	128	3	22	18	150	52	57	82	4	16	889
2014	141	152	116	6	14	1	114	56	20	44	2	6	672

Quest. Type Total				
YEAR	Gen	Ref	IT	Total
2011*	197	165	133	495
2012	333	321	189	843
2013	393	277	219	889
2014	305	224	143	672

Service Point Locations

SP#	Description	Location
SP1	Circulation Desk	By front door
SP2	Tech Services Desk	In back office
SP3	Cataloging & Acquisitions	In back office
SP4	Serials Desk	In back office

*didn't start collecting statistics until November 2010.

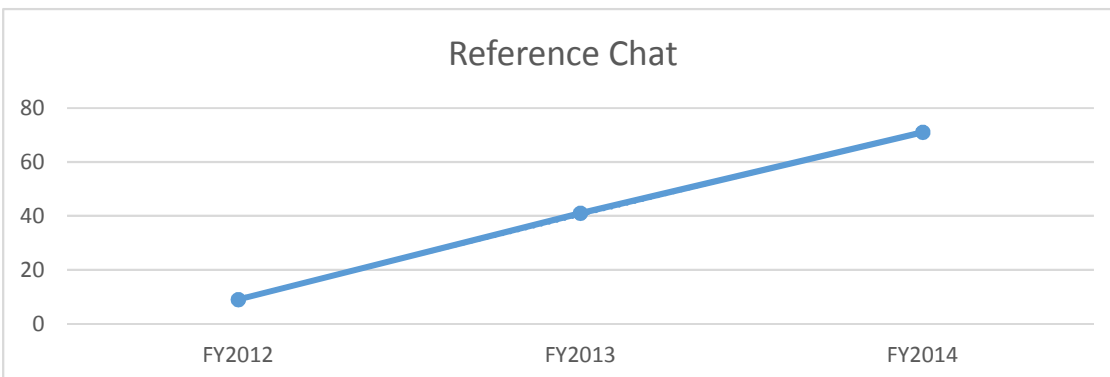
Electronic Chat and Email Services
FY2014

CHAT	FY2012	FY2013	FY2014	% change
Reference	9	41	71	73%
BB	0	N/A	3	
Circulation	0	N/A	2	
Concierge	N/A	N/A	4	
Dropped	0	N/A	20	
Eportfolio	0	N/A	2	
General	0	N/A	7	
IT	1	N/A	15	
Other	0	31	0	
Total	10	72	124	72%

EMAIL	FY2012	FY2013	FY2014	% change
Reference	15	28	45	61%
BB	0	N/A	0	
Circulation	4	5	4	
Concierge	0	N/A	0	
Dropped	0	N/A	0	
Eportfolio	0	N/A	0	
General	0	N/A	0	
IT	0	N/A	3	
Other	0	6	0	
Total	19	40	52	30%

FY2014 was the first complete year using a chat service that worked reliably.

During the summer of 2013 email systems failed. In the process of moving from Outlook to Google, statistics for chat and email showing what other questions besides reference were answered were lost for FY2013.



CampusGuides at UMFK

Guides by Titles	Viewed
Citing Sources at UMFK: APA	932
Welcome to the Acadian Archives/Archives acadiennes at UMFK!	702
CampusGuides at UM Fort Kent	687
Portfolio Resources and Help	399
Nursing at UMFK	328
UMFK Diversions	175
History at UMFK	159
Education at UMFK	93
Psychology at UMFK	51
Criminal Justice at UMFK	46
Business at UMFK	46
Environmental Sciences at UMFK	46
Computer Science at UMFK	43
Health and Wellness at UMFK	26
Online Content at UMFK	26
Literature at UMFK	23
A Guide to Our Biographies	18
Health Care Coverage Information (Affordable Care Act)	13
Special Collections at UMFK	6
Biology at UMFK	5
Forest Protection at UMFK - FOR 330	1

3,825

Year	Viewed	% Diff
FY2013	1,995	
FY2014	3,825	92%

URSUS Tutorial List managed by UMS Tutorial Creative Team - FY2014

Topic	Use	Creator	Status	Sent to Veters	Vetter #1	Vetter #2	Upload Date	Notes
Google Scholar	General	Jess Isler/Nicole Dy	Complete	5/16/2014	Evelyn Greenlaw	Ben Treat	6/12/2014?	
Google Searching	General	Nicole Dyszlewski	Complete	3/25/2014	Evelyn Greenlaw	Cynthia Crosser	5/14/2014	
Google Fun	General	Nicole Dyszlewski	Complete	4/30/2014	Cynthia Crosser	Ben Treat	5/14/2014	
Deep Web	General	Shiva Darbandi	Complete	4/25/2014	Evelyn Greenlaw	Cynthia Crosser	5/20/2014	
Peer Review	General	Shiva Darbandi	Complete	4/25/2014	Evelyn Greenlaw	Cynthia Crosser	5/20/2014	
Accessing databases through the system portal	Universities	Sofia Birden	Complete		Evelyn Greenlaw	Laurie MacWhinn	12/18/2013	
Google Scholar access through UMS	Universities	Sofia Birden	Complete	5/15/2014	Cynthia Crosser	Ben Treat	6/6/2014	
Google Scholar access through Marvel (this service curr	Publics	Sofia Birden	on hold					
URSUS Keyword Search								
URSUS Subject Search	General	Sofia Birden	Complete	5/9/2014	Cynthia Crosser	Evelyn Greenlaw	5/19/2014	
URSUS Accessing Patron Account								
URSUS Renewing Items								
URSUS Limiting by Material Type								
URSUS Searching Journal Titles								
Historical Statistics of the US								
CQ Researcher								
Sociological Abstracts								
American History & Life								
CINAHL w/FT								
Historical Abstracts								
PsycArticles								
PsycInfo								
Sportdiscus								
MLA Int. Bibliography								
Art index Web and Retrospective								
Education FT								
Oxford English Dictionary								
WorldCat								
RefWorks (basic introduction - importing/exporting records)	Universities	Sofia Birden	Sent to Upload	6/25/2014	Ben Treat	Cynthia Crosser		
RefWorks (managing folders)	Universities	Sofia Birden	in progress					
RefWorks (adding citation information from scratch)								
RefWorks (creating a bibliography)								
RefWorks importing from URSUS	Universities	Sofia Birden	Complete		Evelyn Greenlaw	Cynthia Crosser	5/7/2014	added link to print
Credo Reference								
Films on Demand	Universities	Shiva Darbandi	In progress					
How to select limiters (and why do we select them)								
Using Boolean Logic								
Searching by Subject								
Using database driven subjects (how to determine what subjects the database uses)								
How to get a UM card								
Choosing and refining a topic								
Create a thesis statement or formulate a research hypothesis								
Create a research plan								
Searching for Information								
Accessing Information at UMS								
Accessing Books not in UM System; Articles not on Your Campus								
Evaluating Resources	General	Jess Isler/Nicole Dy	Complete	6/4/2014				
Citing Sources	General	Shiva Darbandi	In progress					
Plagiarism and Academic Honesty	General	Shiva Darbandi	In progress					

Process for Sharing Video Tutorials - URSUS

Draft (last updated December 2013)

Once you have a video ready to share:

Step 1: Review your tutorial using the Shared Video Guidelines checklist. Make sure all “required” criteria are met and consider whether you ought to take account of some of the “suggested” criteria before passing your tutorial along to Step 2.

Step 2: Upload the video file to the Google Drive account for this project. Each project will have its own folder, named according to a “resource - purpose - creator” convention, e.g.-- “URSUS Requesting Books Fadel” or “OffCampus CAS FKsbirden”

Please upload *at least* the MP4 videos and the script file in .txt format. Before uploading the script text, make sure that there is a hard return between each piece of citation slide text. See example below:

The next step is to open RefWorks from your library site
(each site will be different).
If you already have an account,
simply log in.

You can upload other “assets” that you think others might find useful, including .pptx, .jpg, .wav, .camproj and .camrec files. We keep a separate file of scripts (since some folks share only their scripts), so please make sure your script is also available in that folder.

Step 3: Notify the three “vettors” by letting them know the title of the tutorial and (optional but helpful) sending them the link to where it is stored in gdrive. The vettors are currently Evelyn Greenlaw, Cynthia Crosser, and Ben Treat. The two vettors who will ultimately suggest changes and approve the tutorial should acknowledge receipt of the tutorial from the creator.

The vettors will check to make sure that the video meets all the required criteria on the Shared Video Guidelines checklist.

Guided by the “suggested” criteria on the checklist (and by personal experience), the vettors may offer additional advice for future drafts or for future videos. Any recommendations for changes that are made by a vetter should be made to the creator and the other vetter in order to give the other vetter the benefit of the information and to encourage communication about the suggestions among the creator and vettors.

The video’s creator(s) will be responsible for correcting any issues identified by the vettors, and they will notify the vettors when updated files have been uploaded to Google Drive.

Step 4: When at least two vetters have approved the tutorial, the creator will inform the “uploader,” who will post your video on the “URSUS Videos” YouTube account. Make sure the uploader has the title of the tutorial and any desired description and/or directions needed. The description text you send is in addition to the default description added to the YouTube page. In addition, you may add names of those who contributed to the creation of the tutorial if so desired. S/he will send an email to the full Shared Tutorials group when it has been uploaded. Each group member will disseminate this information, as appropriate, to his or her local library.

Shared Tutorials Guidelines Checklist

Draft (last updated May 2014)

Required:

Style and Content:

- The tutorial's purpose is made clear to viewers within the first 5 seconds, either orally, visually, or through the tutorial title.
- All content in the video is credited appropriately, either in the description of the tutorial (only visible on the YouTube page itself) or in text within the tutorial itself.
 - Borrowed audio tracks, images, and spoken text are credited in the tutorial itself.
 - Collaborators are credited either in the tutorial or in the description of the video on YouTube.
- Speech is sufficiently articulate to avoid confusing viewers.
- The video lacks errors which would likely confuse or distract viewers.
- Nonverbal utterances (ummm...) are edited out where possible.
- "Dead air" is edited out where possible.
- The video lasts no more than 5 minutes.
- Important video content will not appear near the bottom of the display area, where it would be hidden by users of closed-captioning.

The File Itself:

- Video has a 16:9 aspect ratio and has at least a 1280x720 ("high definition") resolution.
- A caption file has also been uploaded to the Drive folder, enabling captions to be uploaded easily to YouTube.
- Video is saved as an MP4 file (the "HD MP4 up to 720" option).
- **Branding:** In general videos should reference the University of Maine System and/or URSUS Shared Tutorials. This can be done by the creator at the beginning of the tutorial, or the Uploader can add YouTube annotations within the video provided the creator has given the uploader the necessary instructions to do so. ~~Videos lasting longer than 1 minute have intro and exit slides branding this as an URSUS Shared Tutorial. Shorter videos can have a small branding window appear in the window (added as an annotation in YouTube by the uploader, not by the creator of the video).~~

Suggested:

- Consider making the video reasonably fast paced. ~~The video should be reasonably fast paced.~~ It's easier for a viewer to back up and re-watch a section when needed than it is for a viewer to fast-forward through repeated sign-posting or explanations of why something is the way it is.
- If a video lasts more than 3 minutes, consider breaking it into multiple videos that could be grouped in a playlist.
- Zooming and callouts ~~should~~ may be used to limit or attract a viewer's attention to the appropriate section of the screen.
- If you would like to share additional information, such as links, direct users to the description section during the conclusion of the video.

Commented [1]: At some point, not necessarily now, we need to address those campuses who want to do tutorials specific to their library but have no place to post them. My suggestion is we allow them to post to the URSUS youtube station (sending to uploader - not sure vetting of these needs to be done), but the video must have some kind of identifier in it making people aware this is a campus specific video.

Commented [2]: I don't know, I think vetting should happen for anything that's put on the tutorial page.

The only URSUS member who can't post, so far, is Law/Leg, and they can't post because they're not supposed to engage in any "social media" work, so they wouldn't want to brand it as the work of their library, I think.

Commented [3]: I don't want to make more work for us, but I think I agree with Ben. It might be helpful to hear Nicole's opinion here.

Commented [4]: As we have created these, I don't think we need an intro and exit slide unless we want to add it. If tutorial does not mention URSUS or the UMS at the beginning, this can be rectified by adding YouTube "windows" (not sure what the proper name is for them). I would suggest we rephrase this a bit, especially since it is under the "required" section.

Commented [5]: I agree -- I think just the overlaid image used in most videos to date is sufficient.

Commented [6]: I agree as well! Is this just a matter of Tim going in and adding these to every video over 1 minute?

Commented [7]: No, I wouldn't go that far. I think it is up to the creator to provide any branding instructions to Tim when said creator lets him know the video is ready to upload.

If any editing is done to a video after it is uploaded ... [1]

Commented [8]: Makes sense. Thank you for explaining.

Commented [9]: See if how I changed the text works.

Commented [10]: Hi Sofia! This works for me.

Commented [11]: Know that there are neat tricks in YouTube that will allow us to insert the script down below the video so people can quickly go to specific ... [2]

Commented [12]: Perhaps we should include this information from Sofia here in this document. In this way, new creators can be aware of using this ... [3]

Commented [13]: I am now thinking that 3 minutes may be too short a time for suggested breaking up of the video. Maybe 6 minutes or more?

Commented [14]: the shoulds here maybe better served as may's. in other words, callouts may be used to limit... especially since these are suggestions.

- Other considerations during the YouTube upload process (YouTube Tips):
 - Transcripts: <https://support.google.com/youtube/answer/2734799?hl=en>
 - Video Descriptions: <https://support.google.com/youtube/answer/57927?hl=en>
 - Enhancements:
https://support.google.com/youtube/answer/4523183?hl=en&ref_topic=2795929&rd=1
 - This page can give you ideas on how the enhancements work so you can give correct instructions to Uploader)
 - However, note that at the bottom of this page it says: "Annotations do not appear on custom YouTube chromeless players, or on mobile, tablet and TV devices."

Commented [15]: This may be an issue with regard to branding

Page 1: [1] Commented

Sofia Birden

5/28/2014 6:06:00 PM

No, I wouldn't go that far. I think it is up to the creator to provide any branding instructions to Tim when said creator lets him know the video is ready to upload.

If any editing is done to a video after it is uploaded (this includes adding branding after the fact), then the video URL changes. We do not want to change video URLs on people after they have started using them unless absolutely necessary. We can verify that with Tim.

So it is imperative that we provide final instructions to Tim before he uploads.

Page 1: [2] Commented

Sofia Birden

5/28/2014 5:30:00 PM

Know that there are neat tricks in YouTube that will allow us to insert the script down below the video so people can quickly go to specific sections. Also, longer videos can essentially have a TOC where you can link to specific segments. All things to explore.

Page 1: [3] Commented

Shiva Darbandi

5/28/2014 5:30:00 PM

Perhaps we should include this information from Sofia here in this document. In this way, new creators can be aware of using this technology as an option.

Tutorials Style Guide

This document provides information to help increase the consistency of tutorials created for the URSUS system. The following is intended to serve as a helpful guide with the recognition that these suggestions may not always be possible given the various aims and methods employed by each content creator. For additional information refer to the APA Style Guide or the [Shared Tutorial Guidelines Checklist](#).

Font Face

The following fonts are suggested for their availability and readability:

Arial **Helvetica** Georgia Verdana

In order to maintain a clear and consistent visual aesthetic, try to limit the use of fonts to no more than two or three font faces. Avoid decorative fonts as these may be difficult to read.

Font Emphasis

Use **bold** and *italics* to provide importance or emphasize content. Do not rely solely on colors for emphasis, as this can be problematic for users with forms of color-blindness. Avoid words, phrases, or sentences in ALL CAPS whenever possible.

Font Size

Any text that is added to the screen should be at least 22 points in size. Titles should be anywhere between 28 to 32 points in size.

Commented [1]: I am wondering if this document should just be added to the checklist so that it is one less document that others have to find and view.

Commented [2]: probably not a bad idea

Commented [3]: As soon as this document is approved, I will combine the two and update both of you.

Commented [4]: This is not actually Helvetica, which is unavailable in Google Docs.

Commented [5]: There is not industry standard on font size for videos that I know of anyway. I merged a few best practices here to come up with this number. We may want to adjust if we find that this size is too small or large.

Commented [6]: I grabbed these from the URSUS and Mariner sites.



URSUS/Mariner Colors

#3B77B6 #225B94 #6AB344 #457029



#FFFFFF #F2F2F2 #F8FBBD #333333

To convert the hex color codes above to RGB (e.g. 3B77B6 to R59 G119 B182), consider using a [color converter tool](#).

For accessibility purposes, avoid combining the following colors: green and red. Whenever possible text should contrast as much as possible from the background. Try testing your colors with [contrast checker](#) online.

Grammar

Reference the APA Style Guide for information about grammar. The aforementioned suggestions follow APA Style:

- E-Book should only be capitalized when appearing at the beginning of a sentence, otherwise it should be written in lowercase in the following format: e-book. This is also the case for e-mail unless your home institution dictates otherwise.
- Capitalize Internet while leaving websites and web pages in lowercase.
- [E-mail](#) or email?

Tone

- Generally, do we have a preference for 1st or second person?
- Are we striving for a particular tone? (conversational, business-like, upbeat)
- Overall tone should be that is friendly, professional, and upbeat.
- Second person is suggested with use of the first person in cases where personalization can be helpful. Third personal may not be a good fit due to its impersonal nature.
- Avoid complicated or jargony terms that might confuse or overwhelm users.

Using Graphics from Other Sources

- Do not use any copyrighted material for your tutorials without permission. Written permission should be obtained for any copyrighted material use and permission should be forwarded to the vetters so that the permission can be verified.
- It is sometimes difficult to find images that can be safely used or to understand how to comply with the permissions and law. Below is a link to a useful website with resources for finding images that can be safely used: <http://guides.library.upenn.edu/content.php?pid=457444&sid=3753383>

Commented [7]: This list could grow. I'm not sure if I'm missing anything crucial. I didn't want to make this too long.

Commented [8]: I have some grammar ones for your consideration. Should I email them to you both?

Commented [9]: Sorry, this is Nicole :)

Commented [10]: Yes please do!

Commented [11]: If I missed this email, please let me know. I am happy to add anything here. :)

Commented [12]: I just added one for now but see tone section below

Commented [13]: e-mail seems to be the proper form, just like e-book, though both have alternate forms.

Commented [14]: I made a note about e-mail next to e-books. Please adjust as either of you see fit.

Commented [15]: Sounds good as you wrote it.

Commented [16]: What do you think of adding a tone section?

Commented [17]: Nicole is always asking the good questions! I hadn't thought about this at all. Hmm, I think friendly but professional. Research seems to indicate that this is a good combination when librarians interact with students. Perhaps there should also be mention of being cognizant of terminology that might not be apparent to students. When thinking about the cognitive load of students we want to use more simple language and limit the number of new terms and concepts we introduce.

Commented [18]: Tone: friendly, professional, and upbeat.

1st/2nd person: I tend to combine the two. I stay away from anything that refers to me alone, or the "I" but do use terms that refer to both the patron and me as in terms like us or we. I prefer the 2nd person (with a little 1st thrown in as mentioned) because I believe it makes the tutorial more personal to the patron. I have tried the 3rd person, and it is so impersonal, that it just doesn't work.

And yes to minimizing new "library" terms when we can. Being one of the first in the system to change Indexes & Databases to "Find an Article," I am all ... [1]

Commented [19]: I combined what we wrote into the sentences above. Please feel free to adjust or throw out.

Commented [20]: I like it!

Commented [21]: Please let me know if/how you would like this section to evolve.

Commented [22]: I'm wondering if this should be merged with similar statements about image attribution in the Guidelines tutorial. I think having this in two ... [2]

Tone: friendly, professional, and upbeat.

1st/2nd person: I tend to combine the two. I stay away from anything that refers to me alone, or the "I" but do use terms that refer to both the patron and me as in terms like us or we. I prefer the 2nd person (with a little 1st thrown in as mentioned) because I believe it makes the tutorial more personal to the patron. I have tried the 3rd person, and it is so impersonal, that it just doesn't work.

And yes to minimizing new "library" terms when we can. Being one of the first in the system to change Indexes & Databases to "Find an Article," I am all for making sure the patron (student) understands what we mean. Or teach the term if we need to include it.

I'm wondering if this should be merged with similar statements about image attribution in the Guidelines tutorial. I think having this in two different places might be a little confusing. :)

The library directors are asking the Reference Committee to take a look at discovery options. We are in the last year of the Summon contract – it ends December 2014. Summon has been problematic in its implementation and upgrade. Some libraries are using Summon 2.0, some have not upgraded, and some are not using it at all. The directors continue to feel that the reasons for a discovery tool are still valid – users, particularly undergraduates, want the Google-like single search box, it is a way for a user to get to a database they may not know about, and we invest considerable budget into databases that have that have lower use that we would like.

The MARVEL databases now have a trial of EDS. OCLC has a product WorldcatDiscovery, and Innovative has Encore which searches the Ebsco databases. Google Scholar may be an option. Also we have learned that we do have a limited federated search for EBSCO databases under EBSCOhost database collection. It is also provided on MARINER and on MARVEL. This may be available with Proquest too. Of course it does not search the catalog or other resources

The charge from the directors to the committee is to review the options for discovery and make a recommendation to the directors. The directors would support usability studies at the libraries, but since the end of the contract for Summon is in about six months it would have to be done soon. We suggest the Marshall Breeding paper, Discovery Product Functionality, Library Technology Reports. Jan/Feb2014, Vol. 50 Issue 1, p5-32, as a resource.

The URSUS Directors are looking for additional ways to move from collaboration to integration of our libraries. At our last meeting we discussed reference chat as a service that might be a candidate. We are charging the Reference Committee to investigate this possibility. Please let us know what products are currently in use throughout the URSUS libraries and what hours chat is currently offered. We need to know if the products that are currently in use will be usable across the libraries. If chat becomes an URSUS wide service we will need your recommendations of procedures or processes for handling chats that require use of resources at the users' home libraries.