

**WEB DIRECTIONS TEAM**

**REPORT**

**MAY, 1996**

**Submitted May 31, 1996**

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## INTRODUCTION

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The Web Directions Team was created out of a meeting that took place on Feb 13, 1996 of UA Library and NEOS individuals from various teams and units who had an interest in the Library's presence on the WWW. Those in attendance were apprised of the activities and mandate of the U of A Campus Task Force on the World Wide Web and were queried as to whether it was worthwhile to create a similar group whose mandate would be to make recommendations regarding the future direction of the existing UAL Website.

Those present agreed that this was a worthwhile activity, and volunteers stepped forward to form the Web Directions Team. These volunteers who would go on to comprise the Web Directions Team include:

Susan Carlisle, NEOS/ALBERTA ENERGY  
Alan Darnell, ITS  
Jacquie Girouard, FSJ  
Ernie Howe, SCI/TECH  
Fern Russell, HSS  
Susan Stein, ITS  
Linda Slater, HLTHSC, Chair of Team  
Additional input was provided by Sheila White, EDUC

Activities of the Team have included:

- establishing a mandate for the team (see Appendix A for a copy of the mandate)
- consulting "Taking Aim" to determine how the UAL Website fit into the strategic plans of the UA Libraries, and to ensure that our recommendations complied with the Goals and Actions laid out in this document
- familiarizing ourselves with the websites of other academic libraries with a view to assessing what was effective and ineffective at each of these sites
- reading basic (i.e. non-technical) documents on effective web design
- reading documents on Library applications of the WWW
- perusing the existing UAL Website with a critical eye
- brainstorming possible structures for the UAL Website
- identifying and discussing issues related to the UAL Website (e.g. What Web interfaces should we make accessible? Who is our target audience?)

The creation of a University of Alberta Library (UAL) Website is given a high profile in the chapter on Learner Services in "Taking Aim". In fact, as part of Goal 1 ("To assume our role as integrators of a changing array of local and network-based information resources, and instruct learners and develop programming which provides the opportunity for learner self-sufficiency."), Action 1 states

*We will implement a home page as the starting place for learners to access our knowledge and information resources, our services, and our learner information and instructional materials. (p14)*

There are many implications in this short statement. Firstly, if the homepage is to be a "starting place", it must be well-designed so that the resources we seek to make accessible

are easy to find and use by our learners. Secondly, this statement implies a commitment to making as many of our services and resources as possible available through our Website if it is to be a truly effective “starting point”.

A UAL Website currently exists. It was originally created by the Library-Wide Information System (LWIS) Group as the gateway to resources on the Public Access Catalogue (PAC) stations. It was decided to carry the structure of the LWIS over to the Libraries Website in order to maintain a consistent interface to Library resources. Although a systematic evaluation of the UAL Websites has not yet been done, the Webmaster has received positive feedback on the design of our Website.

Despite the positive reaction to the existing UAL Website it is acknowledged that there are still outstanding issues surrounding the Website. In addition, we recognize that the question as to whether our Website can be strengthened in terms of its usefulness as a starting place for accessing library information resources and services bears asking now and at regular intervals in the future. These matters became the focus of the Web Directions Team, and this report is a distillation of the consensus we reached in the course of our deliberations. Our discussion, readings and observations lead us to conclude that the recommendations contained herein will point the direction towards ensuring that the UAL Website is a useful, easily accessible source of information about the UAL and its resources, as well as a means of accessing as many as possible of these resources.

## SUMMARY OF RECOMMENDATIONS

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### Relationship to U of A Website

**Recommendation 1:** We recommend that the U of A Library continue to assume responsibility only for its own Website (comprised of the UAL Homepage and those of its Units) and not attempt to assume responsibility as Webmaster for the entire U of A Website. This responsibility should continue to be the responsibility of the Campus Webmaster.

### Target Audience

**Recommendation 2:** Our target audience should be the staff and students of the University of Alberta, but efforts should be made to ensure that information presented on our Website is easily understandable and accessible (with the exception of those resources we are under licence to make available only to U of A staff and students) to those outside our target group.

*distance ed/  
alternative*

### Relationship to NEOS and other Consortia

**Recommendation 3:** We recommend that the link currently existing between the U of A Website and the NEOS website should be maintained, and whenever a resource mentioned on the UAL Website is one that exists due to the joint efforts of NEOS partners, this should be clearly reflected on the UAL Website (e.g. The GATE: NEOS Libraries Catalogue).

**Recommendation 4:** That ITS ensure that any authentication methods used to provide security to U of A Library information resources should allow seamless access by NEOS clients when they are entitled to access by virtue of the NEOS agreement (e.g. access to HKN databases by local Hospital Libraries).

**Recommendation 5:** That links to other consortia websites be provided where doing so would provide additional resources to our target audience.

### Potential Uses of Web Technology in Providing Alternate Solutions to U of A Library Service Issues

**Recommendation 6:** It is recommended that, whenever appropriate, U of A Library documents be published electronically and be made available on the UAL Website in a section which will be referred to in this document as "The Repository" (although it is probably a good idea to find a name for this which will be more meaningful to our learners).

**Recommendation 7:** It is recommended that there be a serious effort undertaken to evaluate the web interfaces (OVID, SilverPlatter, DRA, FirstSearch) that can be used to provide more user-friendly access to our existing databases.

**Recommendation 8 :** It is recommended that the capability of all unit libraries to provide electronic reference service be assessed by an Electronic Reference Task Group, and Electronic Reference implemented if feasible.

**Recommendation 9:** It is recommended that the Electronic Reserve Desk be made available via the UAL Website.

**Recommendation 10:** It is recommended that an electronic ILL request form be made available on the Website, and that whenever possible, the ability to request ILL's be extended through Web Clients into the various databases we have available.

**Recommendation 11:** There should be a means of checking on status of ILL request available on the Website.

**Recommendation 12:** If possible, it would be advantageous to have a means whereby an automatic check of the NEOS catalogue is done when people enter an ILL request.

**Recommendation 13:** Links to commercial ILL services should be provided.

**Recommendation 14:** It is recommended that as many circulation services as possible be made available through the UAL Website, and that effort should be made to make those services already available via the Infogate more visible.

**Recommendation 15:** It is recommended that as many instructional documents as possible be added to the UAL Website; and that in order to cut down on repetition of glossaries from document to document and to enhance the flow of documents which may be impeded by the in-text definition of terms, an online glossary should be created to define frequently used library, computing or web terms that our users may not understand.

**Recommendation 16:** Information about the U of A Library System currently on our Website should be augmented with additional Library information and by the addition of information of a more promotional nature.

**Recommendation 17:** Information about the U of A Library System currently on our Website should be augmented with additional Library information and by the addition of information of a more promotional nature.

**Recommendation 18:** It is recommended that the home page be kept as simple, welcoming and functional as possible, and that the Library Website maintain a consistent "look" and "feel".

**Recommendation 19:** It is recommended that serious effort be put into creating a visual identity (logo) for the U of A Library.

**Recommendation 20:** The ability to access information resources on the WWW should be a skill possessed by *all* information staff, and each unit should possess the expertise to create electronic documents.

**Recommendation 21:** It is recommended that responsibility for the design, implementation and maintenance of the UAL be the responsibility of a Web Policy Group, Webmaster and a Repository Master.

**Recommendation 22:** It is recommended that an individual be appointed to undertake a project to create and organize the Repository. Once the initial project is finished, this same individual would be responsible for ongoing maintenance of the Repository, as well as providing expertise to Library staff members in electronic document publication. The individual would not be responsible for the content of the documents, however.

**Recommendation 23:** As soon as possible after this document has been presented to SAT, feedback received, and this document modified accordingly and approved by SAT, a small implementation task group should be established to examine our current web presence and to implement any changes it feels would improve access to UAL resources. This should occur under the guidance of the Web Policy Group. Once any changes have been recommended, ongoing changes and maintenance can be left to the Web Policy Group, the Webmaster and the Repository Master.

## **I. Relationship to the U of A Website**

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The suggestion that the Web Directions Team consider the option of assuming the role of Webmaster for the entire University of Alberta Website was offered at the inaugural meeting on Feb 13, 1996. However, input from the Library representative to the U of A Campus Task Force on the World Wide Web indicated that assigning Webmaster responsibilities to the Library was *not* an option the Campus Task Force was considering. It was also decided that present Library staffing levels would make it difficult for us to ensure on-going quality of both the UAL Website and the U of A Website.

**Recommendation 1:** We recommend that the U of A Library continue to assume responsibility only for its own Website (comprised of the UAL Homepage and those of its Units) and not attempt to assume responsibility as Webmaster for the entire U of A Website. This responsibility should continue to be the responsibility of the Campus Webmaster.

The Web Directions team offer the following additional suggestions vis a vis its relation to the U of A Website:

- As recognition of the importance of the UAL resources to the U of A community, the high-profile link to the UAL Website currently provided on the first page of the U of A Homepage should be maintained despite the fact that the Library is now been subsumed under the new portfolio of Learning Support Services.
- The UAL Website should conform to guidelines/recommendations set out by the U of A Campus Task Force on the World Wide Web.
- The UAL Website should seek not to duplicate information provided elsewhere on U of A Websites, but to provide links to this information (e.g. CNS information).
- A representative, or representatives, from the Library system should continue to be involved in the U of A Campus Task Force on the World Wide Web or any groups that evolve from this Task Force.

## **II. Target audience for the U of A Library Web Site**

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**Recommendation 2:** Our primary target audience should be the staff and students of the University of Alberta, but efforts should be made to ensure that information presented on our Website is easily understandable and accessible (with the exception of those resources we are under licence to make available only to U of A staff and students) to those outside our target group.

This would mean directing our energies towards creating a site tailored to the information needs of this particular group. Of course, creating a page that is attractive and easily digestible to our primary users will have the added benefit of providing an information source that will be useful to those outside our primary user group, e.g. the members of our local community, as well as members of the global community who find the information contained on our site useful.

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Other audience issues which have a bearing on the structure and content of our site include the following:

**A. The Library has contracts to provide information services to particular groups (e.g. the Law Society of Alberta; The College of Physicians and Surgeons of Alberta)**

1. Information on the terms of the contracts and instructions on how those to whom the contracts apply should avail themselves of service. Areas providing contracted service to special groups should provide information about this service on their unit homepages. Links to such information should be provided from any documents which discuss service to non-UA groups (e.g. how to obtain library cards).
2. Any services that can be provided via the Web should be made available (e.g. a document delivery form directed to the library responsible for providing service)

**B. Members of our community who are not staff or students of the U of A often make use of our information resources.**

1. Clear information on services provided (including the limits) to members of the community should be provided.
2. Clear labelling of those information resources which are for the use of the U of A staff and students only (e.g. certain of our electronic databases) should occur to pre-empt receiving complaints or inquiries from non-UA users who unknowingly attempt to use these resources.

**C. Our site will be accessible to the world.**

We should make every attempt to present an excellent product that conveys what we wish to convey about ourselves, our services and our resources.

### **III. Relationship to NEOS and other Consortia**

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To emphasize the cooperation that exists between the U of A Libraries and those of the NEOS to those who visit our Website and to facilitate resource sharing among NEOS members, we recommend:

**Recommendation 3:** That the link currently existing between the U of A Website and the NEOS website should, be maintained, and whenever a resource mentioned on the UAL Website is one that exists due to the joint efforts of NEOS partners, this should be clearly reflected on the UAL Website (e.g. The GATE: NEOS Libraries Catalogue).

**Recommendation 4:** That ITS ensure that any authentication methods used to provide security to U of A Library information resources should allow seamless access by NEOS clients when they are entitled to access by virtue of the NEOS agreement (e.g. access to HKLN databases by local Hospital Libraries).

**Recommendation 5:** That links to other consortia websites be provided where doing so would provide additional resources to our target audience.



## **IV. Potential uses of web technology in providing alternate solutions to U of A Library service issues**

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*"Taking Aim" p. 14 Learner Services Goal 2: To redesign routine, high-volume services activities to maximize user-self-sufficiency and minimize staff mediations.*

Given the Library's commitment to its Web service all staff should develop a mindset which will allow them to look at what they do (and what our patrons do) and seriously ask themselves "Can this activity be done on the Web?" Sometimes the answer will be "no", but when the answer is "yes" or "maybe", serious investigation as to how a Web solution can be implemented should be undertaken.

The Web Directions Team suggests that Web technology can be used in the following areas to assist us in reaching Learner Services Goal 2:

1. Electronic Publishing
2. Use of Web Clients
3. Access to Library Services
- \* 4. Library Instruction
5. Library Promotion/Information

### **1. Electronic Publishing**

**Recommendation 6:** It is recommended that, whenever appropriate, U of A Library documents be published electronically and be made available on the UAL Website in a section which will be referred to in this document as "The Repository" (although it is probably a good idea to find a name for this which will be more meaningful to our learners).

#### **Criteria for inclusion of a document on the UAL Webpage:**

- Relevance to public (e.g. pathfinders, cheat sheets, policy documents)
- System-wide staff relevance (e.g. ITS TIPs sheets, policy documents, circulation policy)
- Conforms to U of A Library Website guidelines
- Material is not of a confidential nature

#### **General Suggestions for Documents in the Repository:**

1. The copy of any document on the Website should be the most current copy and will function as the "definitive" copy of that document. Any hard copies of this document made available to library users should be the same version as on the Website. Older versions of any hard copies of documents will be discarded.
2. Each page of each document on the UAL Website should contain the following: the creator of the document, the date of publication, copyright information and the UA/UAL identifier.
3. Documents should be made available in *both* html and .pdf format whenever possible. Adding the availability of .pdf format will provide a document format suitable for printing off and distributing to library users and/or library staff, in acknowledging that

there will be a continuing need for certain print materials in U of A Libraries. Also the future integration of a PDF viewer into web browsers will allow presentation of documents in this format over the web. This will be advantageous as the PDF format allows presentation of much richer documents than is possible with html documents.

4. The Repository should be searchable.
5. Whenever a document refers to an item in one of the NEOS collections, a link should be provided to the catalogue record in the Web version of the NEOS catalogue (e.g. a pathfinder may refer to a particularly useful publication in rather cursory form; a link should be provided to its catalogue record so that a patron has easy access to the full bibliographic information for this item).
6. Links from the existing Guides to Resources by Subject should provide links to documents in the Repository. The "Guides" section of the Website currently interfiles links to internal resources with links to external resources. The Web Directions Team feels this approach should be maintained so that resources of like subject, no matter what their origin, are listed together. We feel our users, who are concerned more with relevance of resources than where they originated from, will appreciate the seamless access this provides.

#### **Advantages of Electronic Publishing of Documents:**

- Provides quick access to documents throughout the system
- Provides quick access to U of A Library documents to distant learners
- Allows access to instructional materials to librarians in other institutions
- Cuts down on unnecessary proliferation of paper (if hard copy of document is required, it can be printed off from web browser in only quantity needed) "Just in time, rather than just in case."
- Allows for quick and easy up-dating of documents
- Dispenses with the need for a central storage and distribution system

#### **Disadvantages:**

- Many useful publications already exist in hard copy; much time will have to be invested to convert them
- Not everyone (library users and staff included) has the skills to find and use Web documents; training will be required for staff and library users
- Not enough system-wide expertise in electronic publishing currently exists; training will be required for staff
- Will require constant monitoring to ensure that information in documents is kept up-to-date

## **2. Use of WebClients**

*"Taking Aim" p. 15 Learner Services: Goal/Action 2: We will provide a Web-based search interface to the Gate, as well as to a range of citation databases.*

The Library system is moving in the very near future towards the use of Netscape as the core tool to provide access to information resources on its public access terminals. As it stands now, the Library has already purchased the DRA Web Client and the Web SPIRS client is available free of charge. Purchase of the OVID Web Client, however, will involve

considerable outlay of money. Although the price (or lack thereof) of a webclient is certainly a consideration in any decision we make about implementing it, equal consideration should also be given to the functional qualities of it, as determined by a thorough assessment of its capabilities.

**Recommendation 7:** It is recommended that there be a serious effort undertaken to evaluate the web interfaces (OVID, SilverPlatter, DRA, FirstSearch) that can be used to provide more user-friendly access to our existing databases.

#### **Advantages of Using Web Clients**

- Also us to avoid terminal emulation problems with form-based interfaces
- Potential exists for a more consistent look and feel
- Less training is required by users in a "point and click" environment
- Potential exists for expanding services to include local resources not currently available through The GATE (e.g. cd rom resources)

#### **Disadvantages of Using Web Clients**

- Loss of functionality in some search engines
- Costs in some cases (e.g. OVID)
- May need to continue supporting terminal emulation in addition to Web Clients for users without access to a web browser

The interfaces should be evaluated for: their ability to work with its "native" system, as well as its ability to work well with other systems; what functionality is lost using the web interface; its user-friendliness; ability to support document delivery, and costs involved.

Recommendations should be made regarding: whether we maintain all four interfaces or only a certain one; whether access to, and support of both the web interface and the "native" mode (e.g. *both* Unix OVID *and* Web) should be preserved if access to the web interface is provided.

Evaluation should be done in teams made up of staff with appropriate expertise (e.g. PAC team should evaluate DRA web interface; OVID team evaluate OVID interface, etc). These teams would then be responsible for the production of documentation and coordination of the implementation of the interface should the decision be made to make the interface available.

### **3. Access to Library Services**

With access to the Web becoming more common, more U of A staff and students are interacting with the Library using this vehicle. In addition, many U of A courses are offered via the Web, making Web-accessible Library resources a logical complement to Web-based course offerings. Another factor that makes a library "full-service" Web interface attractive is the potential for reducing demands placed on staff at public service points.

Many services and resources are currently accessible via our Website. At this point, it is important to ensure that, for areas where there has been activity, the pieces come together, and that future enhancements also find an appropriate place on the Website.

**Recommendation 8:** It is recommended that as many library services as possible that can made “self-serve” be made available through the U of A Library Website. These would include:

- A. Electronic Reference
- B. The Electronic Reserve Desk
- C. Interlibrary Loans/Document Delivery
- D. Circulation.

#### **A. Electronic Reference Service**

*“Taking Aim” Learner Services p. 15 Goal 1/Action 4: We will increase the learner’s access to staff support by providing electronic contact information and integrated electronic mail capability for remote reference and feedback.*

The Web Directions team feels it would be desirable to have the means to deliver electronic reference service via the UAL Web Site as soon as possible. The Education Library currently offers electronic reference service, and there is some indication that other areas feel they could introduce this service without too much disruption. However, there is the recognition that not all unit libraries have the resources to provide such services at this time.

**Recommendation 9:** It is recommended that the capability of all unit libraries to provide electronic reference service be assessed by an Electronic Reference Task Group, and System-wide Electronic Reference implemented if feasible.

Activities of the E-Reference Group would entail evaluating whether staffing and expertise exists in each area to provide effective electronic reference service. If it is found that adequate staffing levels and expertise are lacking in any particular area, recommendations on how these gaps can be filled should be explored as well.

#### **Advantages of Electronic Reference**

- Expands reference service beyond hours of reference desk and beyond the confines of Library buildings
- Relieves staff pressures (e.g. line-ups) at Reference/Information Desks
- Provides a tangible way of collecting statistics (e.g. have a record of type of questions asked, as well as number of questions)
- Provides source of information regarding frequently asked questions that should be dealt with in the UAL Website FAQ
- Provides us with information that will help us hone our Website
- Opens up our reference services to a wider audience (good thing or bad thing???)

### **Disadvantages of Electronic Reference**

- Places additional call on staff resources
- Eliminates face-to-face communication and could be some breakdown in the reference interviewing process
- Opens up our reference services to a wider audience (good thing or bad thing???)

### **B. The Electronic Reserve Desk**

**Recommendation 10:** It is recommended that the Electronic Reserve Desk be made available via the UAL Website.

Allowing remote access to E-Reserve Desk materials would facilitate getting such materials into the hands of distance learners, as well as allow students to obtain reserve material in a location that is convenient to them (be it at home or in a campus computing lab).

*cost?*  
A means of collecting applicable fees from those accessing the E-Reserve Desk will have to put in place, as well as a means of ensuring that only usage of E-Reserve materials complies with the terms of our CanCopy licence and copyright laws.

### **Advantages of Web-accessible Electronic Reserve**

- Provides off-site access to Reserve collection
- Eases demand for in-Library terminals
- Eases wear-and-tear on Library printers

### **Disadvantages of Web-accessible Electronic Reserve**

- Have to come up with a secure means of collecting fees from those accessing documents
- Requires training of patrons in how to access materials

### **C. Interlibrary Loans/Document Delivery**

**Recommendation 11:** It is recommended that an electronic ILL request form be made available on the Website, and that whenever possible, the ability to request ILL's be extended through Web Clients into the various databases we have available (e.g. if person is in Medline and discovers an item not in our collection, he or she can initiate an ILL request while still in the Medline database and have the bibliographic information pulled out from the database instead of having to enter it themselves).

**Recommendation 12:** There should be a means of checking on status of ILL request available on the Website.

**Recommendation 13:** If possible, it would be advantageous to have a means whereby an automatic check of the NEOS catalogue is done when people enter an ILL request to ensure that the item being requested is not already in the collection, and if it is in the collection, a request would be rejected and the requestor would see a message informing him or her where the item is available.

**Recommendation 14:** Links to commercial ILL services should be provided for those who wish to avail themselves of these services or for non-UA people who do not qualify for our ILL service.

### **Advantages**

- Patrons can request ILLs without having to come to the Library
- Elimination of hard copy records
- Ability to download electronic requests into ILL ordering and administration systems without manual keying-in of information
- Provision of more accurate bibliographic information for those requests where records are pulled out directly from online databases
- Elimination of requests containing barely legible hand-writing

### **Disadvantages**

- Time spent dealing with requests for items that are in the collection if there is no means of having the NEOS catalogue automatically checked when a request is entered
- The easier it gets to request ILL's the more likely the patron may be to order a lot of them whether or not they really need the items or not
- Time spent dealing with requests from non-primary clients
- Ensuring security for those requests where a financial transaction takes place (e.g. CISTI RUSH service or non-primary clients who choose to pay for a request)
- Requires training of patrons in use of online request form
- Protests from patrons who prefer to submit hard-copy requests rather than use an electronic request form

## **D. Circulation**

The following services should be provided either through DRA (which itself will continue to be made available through the Library Homepage) or through other means on the Homepage:

- Placing holds/recalls
- Renewals (already exists)
- Paying fines (chargeable to One-Card)
- Check borrowing records
- Request library cards
- Provide borrower information (e.g. borrowing periods; who is entitled to card; how to obtain card)
- Arrange document delivery/pickup (photocopying chargeable to One-Card)

Many of these services are already available online, but their availability is not readily obvious.

**Recommendation 15:** It is recommended that as many circulation services as possible be made available through the UAL Website, and that effort should be made to make those services already available via the Infogate more visible.

This will mean providing links to these services outside of DRA so that our Website users are aware of these services even if they have never yet searched the NEOS catalogue, had a library orientation or read any instructional literature.

#### **Advantages**

- Eases line-ups at Circulation Desks
- Eases demand for in-Library terminals
- Allows patrons to avail themselves of Circulation services at home or in their offices

#### **Disadvantages**

- Require secure means of enacting financial transactions (e.g. for paying fines) and of gathering personal information (e.g. for library cards)
- Requires training of patrons so they are able to do their transactions online

### **4. Library Instruction**

The InfoLit Team has already shown leadership in mounting many instructional documents onto the UAL Website. These documents take the form of instructional documents, tutorials and information regarding courses and instructional sessions.

It has already been recommended in this document that as many library publications as possible be made available electronically on the Website. This would include “passive” documents such as the ones we have already mounted, as well as interactive tutorials that link “how to” information with actually practice of the skills being imparted.

Instructional material would be stored in the Repository, but links to documents would be provided in any (and as many) locations on the Website as applicable.

#### **Electronic Glossary**

Many of our instructional documents provide glossaries or definitions of terms within the text of the document, and it is highly likely that many of these terms would be repeated from one document to another.

**Recommendation 16:** It is recommended that as many instructional documents as possible be added to the UAL Website; and that in order to cut down on repetition of glossaries from document to document and to enhance the flow of documents which may be impeded by the in-text definition of terms, an online glossary should be created to define frequently used library, computing or web terms that our users may not understand.

Links will be provided from words within UAL website documents to the glossary, although the glossary (which will be in alphabetical order) will be accessible as a document in and of itself as part of the Repository. Links from the glossary to non-UAL website information sources will be provided (e.g. if there is a definition for “.pdf file” we could provide a link to the Adobe site where the Acrobat reader can be obtained; or if there’s a

“perfect” definition of a word somewhere out on the Net that “says it all” we could provide a link to that definition instead of having to come up with our own).

#### **Advantages**

- All instructional material available to all staff whenever they need it
- Instructional material available to students and staff outside the library (including distance learners)

#### **Disadvantages**

- Requires investment of staff time to convert existing instructional documents into electronic form
- Requires training of staff so they can easily and quickly produce electronic documents
- Have to change mind-set of staff from producing print documents with all the limitations inherent in the print format to being able to exploit the capabilities of electronic formats (implies awareness training of staff so they know what can be “done”)

### **5. Library Promotion/Library Information**

Currently, there is a wide range of information on our Website about the U of A Library System.

**Recommendation 17:** Information about the U of A Library System currently on our Website should be augmented with additional Library information and by the addition of information of a more promotional nature.

- The type of information which could be added (continue to be added) includes: information about the U of A Library system and what makes it unique
- an electronic newsletter that includes “What’s New” information
- a section on the Website for projects we are working on, including request for feedback on these projects
- new acquisitions lists
- “suggestions for purchase” forms and other means for Library users to interact with collections librarians; library policies
- bindery lists

#### **Advantages**

- Raises Library profile
- Keeps Library users up-to-date in an efficient manner
- Provides an easy means to solicit feedback from people on projects we are working on

#### **Disadvantages**

- We have to be careful how we publicize our experimental activities to avoid making promises we can’t keep, or raising people expectations above what we can actually deliver
- Have to ensure we are realistic about any time-lines we publicize for future endeavours
- If we ask for feedback, do we have the responsibility for acting on it as quickly as possible?



## **V. Structure/Appearance of the U of A Library Website**

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**Recommendation 18:** It is recommended that the home page be kept as simple, welcoming and functional as possible, and that the Library Website maintain a consistent “look” and “feel”.

General suggestions that the Web Directions team has regarding structure of the UAL Website are as follows:

### **A. The Homepage:**

- The Homepage should be kept as simple as possible. It should provide some initial welcoming information, introduce the U of A Library (i.e. provide an informational and promotional section), provide access to the FAQ, and reflect in the clearest way possible the various functions performed by the Library (services, instruction, providing access to electronic resources).
- The Homepage should continue to have a search engine capable of searching the contents of the entire UAL website.

### **B. Other Documents on the UAL Website:**

- All other pages on the UAL Website, including unit homepages, will reflect the simplicity of the opening Homepage. We should strive for consistency of “look” and “feel” throughout the various pages of the UAL Website.
- Knowing that information available on one part of the Library Website may be relevant in other parts, the use of links between sections is to be encouraged. Creating documents that repeat information should be actively discouraged in order to save computing resources, as well as to ensure consistency of information.
- In addition to the visual identity, each document on the UAL Website should include the date of publication, the source (author and unit), contact information (email address) and copyright statement.
- We suggest Unit Homepages contain the following information:
  - Logo/Name of Library/Location
  - Mission Statement
  - What’s New in this Unit
  - Link to Hours information
  - Who Served (links to relevant Faculties/Depts)...
  - Collection Policies (if desired)
  - Services (circ, ref, instructional programs, etc. Links where appropriate)...
  - Staff (by function)...

### **C. Graphics:**

**Recommendation 19:** It is recommended that serious effort be put into creating a visual identity (logo) for the U of A Library.

- A visual identity (logo) should be created for the U of A Library. This visual identity should be incorporated into *each page* of the Library website. This could be done by either using the logo as a “button figure” or as a banner/footer on each page. The U of A Campus Task Force of the Web will be recommending that all U of A documents bear a U of A identifier. That being the case, the UAL logo used be designed so that it can be used in conjunction with the U of A identifier.
- Apart from the UA/UAL logos, graphics should be used sparingly and mainly in the form of clickable buttons allowing users to move through the website or as banners identifying a page as part of the U of A Library Website. These buttons and banners will be consistent across the various pages comprising the Website.
- “Wallpaper” should *not* be used on any page within the U of A Library Website.

### **D. Storing of UAL Website document files:**

All files containing UAL Website documents should be housed on one server, and this server should be one maintained by the Library system by ITS staff. Exceptions should be made only under special circumstances. Granting of exceptions will be done by the Web Policy Group (this group is defined below on page????). In such cases, a link from the UAL Website to the non-Library server will be provided and/or there will be mirroring of the files.

### **E. Industry Canada Summer Students**

The work of the Industry Canada Summer Students requires them to be heavily involved in Web issues, including an evaluation of web “best practices”. It is suggested that the Web Policy Group consult the students to tap into any insights they may have on web-related matters. If, by the time the Web Policy Group is formed, the students’ employment is finished, the Web Policy Group should consult any documentation they may have created.

## VI. Training Issues

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*"Taking Aim" p. 19 Human Resources Goal V: To be characterized as having a staff comfortable with, and proficient in the use of all appropriate information technologies.*

**Recommendation 20:** The ability to access information resources on the WWW should be a skill possessed by *all* information staff, and each unit should possess the expertise to create electronic documents.

The Technology Training Team will identify the appropriate WWW skill set required by UAL information staff. They will also be responsible for identifying the need for training sessions and deliver these until all appropriate staff have acquired the skills necessary to use the WWW effectively.

It will be the ~~responsibility of the unit~~ to appoint an individual or individuals to be responsible for the creation and maintenance of electronic documents. The Technology Training Team will ensure that training is provided to those individuals requiring instruction in how to create/maintain electronic documents.

## VII. Staffing Resources

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The quality of our Website will depend largely on the skills and talents of those assigned leadership/advisory tasks in the maintenance of the site.

**Recommendation 21:** It is recommended that responsibility for the design, implementation and maintenance of the UAL be the responsibility of a Web Policy Group, Webmaster and a Repository Master.

An on-going **Web Policy Group** should be created to guide the Webmaster and The Repository Master in matters of policy regarding the Website. This group would also be responsible for periodic evaluations of the Website in terms of its accuracy, timeliness and effectiveness as an information resource. It is recommended that the LWIS Group reform as the Web Policy Group and update its mandate accordingly.

A **Webmaster** working out of ITS is currently responsible for the UAL website. This individual should continue to be responsible for refining and maintaining the structure of the "high-level" web page, as well as for "putting together the pieces" of the overall website and maintaining links contained on it.

A **Repository Master** should be appointed to oversee electronic publication for the UA Libraries. (See below under *Electronic Publishing* for information about this position.) It will also be the responsibility of the Repository Webmaster to ensure that consistency of design throughout the UAL website is maintained.

Content of documents on the web page will be the responsibility of individuals/committee/task forces/teams within the Library system. Units will continue to develop the structure of their own web-pages in accordance with guide-lines set out by this task-force and by any individuals or groups assigned the task of interpreting these guidelines (e.g. The Webmaster, The Web Policy Group, The Repository Master).

**Recommendation 22:** It is recommended that an individual be appointed to undertake a project to create and organize the Repository. Once the initial project is finished, this same individual would be responsible for ongoing maintenance of the Repository, as well as providing expertise to Library staff members in electronic document publication. The individual would not be responsible for the content of the documents, however.

**Tasks that the Repository Master would undertake include the following:**

- Identification of existing print documents that should be converted into electronic format (should be done in conjunction with InfoLit team)
- Development of guidelines and templates for publication of U of A Library electronic documents
- Ensuring the currency and accuracy of information contained in the documents (this would be done in conjunction with the originators of documents)
- Development of expertise in web design, electronic publishing
- In conjunction with other ITS staff members, identify and test user-friendly web development/pdf software that can be made available system wide to library staff
- Conversion of documents for areas lacking staff expertise in electronic publishing
- Liaising with Webmaster to ensure links to documents in the Repository are provided in other pages on Library Website as appropriate

It was felt that, although each unit should work towards having at least one individual capable of producing electronic documents, the overseeing of electronic publications should be centralized in the form of the Repository Master for the following reasons:

- not all areas currently possess the expertise required to produce electronic documents
- the initial conversion of existing print documents into electronic documents will be a very time-consuming effort
- a centralized person over-seeing publications can ensure maintenance of standards, consistency and currency and ensure that there is no duplication of effort far more efficiently than can many individuals scattered throughout the system

It was outside the mandate of the Web Directions Team to give full consideration to non-electronic publications, but there was some discussion by the Team of the possibility of having the Repository Master responsible also for non-electronic publications (e.g. be the consultant when glossy brochures need to be produced).


## VIII. Final Suggestion Towards Implementation

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Because of the rapidly-changing nature of the Web, it becomes extremely easy for an institution to get left behind in web development if recommendations for change in this area are left on the back-burner too long before they are implemented. The other phenomenon that occurs when a unified web strategy is slow in being enacted is that those in the system who are enthusiastic about the possibilities of the web will go ahead with web projects on their own, and the website develops in a haphazard way that leads to inconsistency between the various parts.

To avoid these problems, the Web Directions Team makes this final recommendation:

***Recommendation 23:*** As soon as possible after this document has been presented to SAT, feedback received, and this document modified accordingly and approved by SAT, a small implementation task group should be established to examine our current web presence and to implement any changes it feels would improve access to UAL resources. This should occur under the guidance of the Web Policy Group. Once any changes have been recommended, ongoing changes and maintenance can be left to the Web Policy Group, the Webmaster and the Repository Master.



## **APPENDIX A: MANDATE OF THE WEB DIRECTIONS TEAM**

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### **1. To provide the Library response to the U of A Campus Task Force on the World Wide Web**

- make suggestions as to where UA Library fits in Campus web strategy (part of web? or administrator of web?) with input from NEOS particularly where there is overlap/points of contact between UA and NEOS resources (e.g. DRA)

### **2. To provide guidelines for the U of A Library web presence**

- develop the look and structure of the U of A Library web presence
- design the high-level structure of the U of A Library web-page; provide guidelines for unit-level structure
- develop a common language for speaking about the web
- develop a graphics policy (including exploring the issue of a U of A Library visual identity)

### **3. To develop a strategy for on-going monitoring of the U of A Library web presence**

- develop the appropriate approval mechanism for future developments in design and layout of U of A Library web-pages, including identifying who should be involved in this (the Web Directions team? the LWIS team? some other team created for this purpose?)
- develop a mechanism for evaluating and improving the U of A Library web-presence

### **4. To identify training issues surrounding the development of web-pages**

- identify what training needs to be provided to library staff in order to facilitate development of effective web-pages
- identify what training needs to be provided to library staff in order to be effective users of the www

### **5. To identify necessary staffing resources**

- decide where web expertise should reside (e.g. ITS or in unit libraries or both)
- decide what staffing model will best ensure quality of web presence, e.g. staff member(s) seconded to web projects or staff members fit work on web projects into their existing duties

### **6. To explore the potential uses of web technology in providing alternate solutions to U of A Library service issues (improving access to Library resources and information resources external to the Library)**

- explore what's possible
- identify problems/issues for which use of web could provide possible solution
- make recommendations on what future directions should be pursued

