

Understanding your Users and Improving their Experience using ILLiad data: the Textbook Example

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March 18, 2015



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Outcomes

- Learn how to identify a population to survey using your ILLiad data, both users and request type.
- Learn how to design an effective user survey and distribute it successfully.
- Learn how to demonstrate you are meeting (or determine what you can do differently **to** meet) the user expectations identified in your survey by using data from ILLiad.



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Determine what it is you want to know

State your problem in the form of a question or series of questions:

“When undergraduate students order textbooks on ILL, does ILL meet their expectations?”

Break the question into parts:

Undergraduate students & Textbooks



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Define your terms

Undergraduate students – students in the first four years of post secondary education pursuing a bachelors degree of some sort.

Textbooks – any book that is required reading, recommended reading or a required workbook for a class.



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Determine if ILLiad contains the data you want or need?

Undergraduate students are identified in the
UsersAll.Status field.

A date range can be identified by the
Transactions.CreationDate field.

A Transactions.ThisIsATextbook? Field does not exist.
(Enhancement request?)

Can we identify and extract that data, i.e., textbook
information, in some other way?



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Why are we talking about the query now?

1. Because if we cannot identify the patrons and a type of request, we do not have a target population to survey nor a specific request type.
2. Because the best designed survey in the world is not going to be very informative to the library, or helpful to your patrons, if you cannot test your survey finding against your data. It needs to be actionable.

Sociology without numbers is trivial pursuit and if it's just numbers, it's statistics. –D. Perkins



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The textbook query to make the table or the Foundation of our study

- **Status** – undergraduate
- **Email address** – so we have some way to distribute the survey
- **Date range** – so we can limit the population to current students
- **Textbooks** – we tagged request one quarter. Super time consuming. A find duplicates query works almost as well with far less effort.
- **Transaction details** – filled, unfilled, TAT, renewals, etc.



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Extract the Data you will query over and over

1. Use a Make Table query in MS Access to create a new table containing the requests you will base your analysis upon.
2. The transaction data, in this case, is the requests identified as textbooks ones.
3. Remember that the TN number is the key to ALL and it is the bridge across ILLiad's many tables. You will need and use this number over and over.



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All tagged textbooks

| Note | LoanAuthor | LoanTitle | Lo | LoanD | LoanEdition | Status | TransactionDate | ISSN | ESPNum | TransactionStatu | Transact |
|-----------------|-----------------|--|-------|-----------|----------------|----------|---------------------|-----------------|-----------|----------------------|----------|
| textbook | Jewish Publica | [Tanakh] = JPS Hebrew-English Tanakh : the traditio | Jewi | 1999 | | Undergr | 1/2/2013 4:02:43 PM | 9780827606562 | 40848438 | Callslip | 426106 |
| Textbook. | Kreps, David M | A course in microeconomic theory | Princ | c1990 | | Graduate | ##### | 0691042640 (all | | Checked Out to Cu | 427578 |
| TEXTBOOK. | Acock, Alan C. | A gentle introduction to Stata / | Stata | 2010,MA | 3rd ed | Graduate | ##### | 9781597180757 | 656264597 | Request Finished | 429918 |
| textbook | Goldstein, L. | A guide to college and university budgeting: Founc | | 2012 | 4th | Graduate | 1/7/2013 1:47:47 PM | | | Cancelled by ILL Sta | 427737 |
| Textbook. if th | Pavia, Donald L | A microscale approach to organic laboratory techni | | 2013 | Fifth edition. | Undergr | ##### | 9781133106524 | 747528885 | Cancelled by ILL Sta | 427928 |
| textbook | Pavia, Donald L | A microscale approach to organic laboratory techni | | 2013 | Fifth edition. | Undergr | 1/8/2013 7:11:51 AM | 9781133106524 | 747528885 | Cancelled by ILL Sta | 427408 |
| textbook | Pavia, Donald L | A microscale approach to organic laboratory techni | | 2013 | Fifth edition. | Undergr | ##### | 9781133106524 | 747528885 | Cancelled by ILL Sta | 430684 |
| textbook | Pavia, Donald L | A microscale approach to organic laboratory techni | | 2010 | 4th | Undergr | ##### | | 747528885 | Cancelled by ILL Sta | 431257 |
| Textbook. | Gold, Martin, I | A new outline of social psychology / | Ame | 1997 | | Faculty | ##### | 1-55798-408-5 | 36170571 | Request Finished | 428466 |
| textbook | Darlene Clark F | A Shining Thread of Hope | | January 1 | | Undergr | ##### | | | Checked Out to Cu | 425619 |
| textbook | Hine, Darlene C | A shining thread of hope : the history of Black wom | | | | Undergr | ##### | 0-7679-0110-X | | Request Finished | 425231 |
| textbook | Butcher, James | Abnormal psychology. | | March 23 | 15 | Undergr | ##### | 9780205167265 | 775775667 | Cancelled by ILL Sta | 425714 |
| textbook | Butcher, James | Abnormal psychology. | Pear | c2013 | 15th ed | Undergr | ##### | 9780205167265 | 775775667 | Cancelled by ILL Sta | 429246 |
| textbook | Butcher, James | Abnormal psychology. | Pear | 2013 | 15th ed. / | Faculty | ##### | 9780205167265 | 775775667 | Request Sent | 438610 |
| textbook | Butcher, James | Abnormal psychology. | Pear | 2013 | 15th ed. / | Undergr | ##### | 9780205167265 | 775775667 | Cancelled by ILL Sta | 430759 |
| textbook | Butcher, James | Abnormal psychology. | Pear | | 15th ed. / | Undergr | ##### | | 775775667 | Checked Out to Cu | 426682 |
| textbook | Butcher, James | Abnormal psychology. | Pear | | 15th ed. / | Undergr | ##### | 9780205167265 | 775775667 | Checked Out to Cu | 425552 |
| em'd P that the | Marshall, Davic | Accounting : what the numbers mean / | MCG | April 14 | 9th 11 | Undergr | ##### | 9780073527062 | 436027971 | Request Finished | 386990 |
| em'd P that the | Marshall, Davic | Accounting : what the numbers mean / | MCG | April 14 | 9th 11 | Undergr | ##### | 9780073527062 | 436027971 | Request Finished | 386990 |
| textbook | Marshall, Davic | Accounting : what the numbers mean / | McG | 4/14/201 | 9 | Undergr | ##### | 9780077398279 | 436027971 | Request Finished | 424339 |
| Library DOES N | McMullan, Jim, | Actors as artists / | | 1994 | | Graduate | ##### | | 33499396 | Request Finished | 274239 |
| textbook | Amemiya, Take | Advanced econometrics | Basil | 1985 | | Graduate | ##### | 0631133453 | | Customer Notified | 428523 |
| textbook | Thornton, John | Africa and Africans in the making of the Atlantic wc | Caml | 1998 | | Undergr | ##### | 0521593700 | 37545606 | Checked Out to Cu | 430266 |
| textbook | King | African-American Politics | | | | Undergr | ##### | 9780745632810 | | Checked Out to Cu | 425560 |
| textbook | Kleinberg, Jon. | Algorithm design / | | 03/26/20 | | Undergr | 1/9/2013 6:20:39 PM | 0321295358 | 57422612 | Cancelled by ILL Sta | 425061 |
| textbook | Kleinberg, Jon. | Algorithm design / | | Mar 26, 2 | | Graduate | ##### | | 57422612 | Cancelled by ILL Sta | 427485 |
| Textbook. | Kleinberg, Jon. | Algorithm design / | Pear | c2006 | | Undergr | ##### | 0321295358 (all | 57422612 | Checked Out to Cu | 429499 |
| Textbook. | Kleinberg, Jon. | Algorithm design / | | March 26 | 1 | Graduate | ##### | 0321295358 | 57422612 | Checked Out to Cu | 429584 |
| textbook | Kleinberg, Jon. | Algorithm design / | Pear | c2006 | | Graduate | ##### | 0321295358 (all | 57422612 | Cancelled by ILL Sta | 427541 |
| textbook | Kleinberg, Jon. | Algorithm design / | Pear | 2006 | | Undergr | ##### | 9780321295354 | 57422612 | Checked Out to Cu | 429318 |



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Lets do it!

1. Population identified.
2. ILLiad data extracted, table created.
3. Survey created.
4. Emails sent.
5. Responses received .
6. Survey response data to analyze.

But first a word about good survey design.....



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Good Survey Design I

“If you’re gonna do it, do it right”

- Michael, George



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Good Survey Design II

”Now don't go wasting my precious time”

- Spice Girls, The



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Good Survey Design III

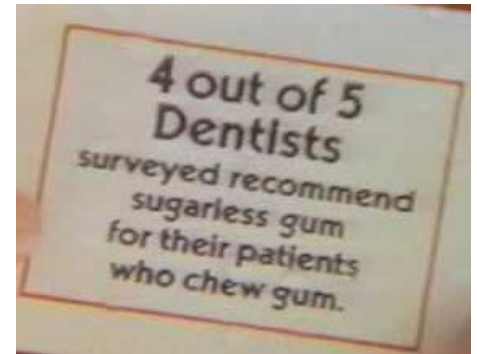
- Ask Specific yes/no questions.
- Open-ended questions should be reserved for focus groups.
- Keep it short and simple.
- Let people know how long it will take.
- You need hard numbers or other concreteness so you can compare your survey results to your ILLiad data.
See, Query Design above



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At the most fundamental level - Does it work?

- Your survey needs have sufficient **Reliability**. If you ask 10 people, you should get the basically the same answer.
- Your survey needs **Validity**. Does your survey measure what you want it to?






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Let's Test This with a Real Survey




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Help the Library do a Better Job

 Kurt I Munson

Sent: Wed 10/22/2014 2:46 PM

To:  Kurt I Munson (kmunson@northwestern.edu)

Hello,

Would you help us by filling out a brief 2-5 minute survey about using interlibrary loan to get textbooks? Our records indicate you requested at least one textbook using Interlibrary Loan (ILL) during the past school year. Textbooks can be difficult to get on ILL so we want to know how well we did, what your expectations were and how well this worked for you.

Any feedback you give will be recorded completely anonymously, and the survey itself is located here:
<https://www.surveymonkey.com/s/GTC93S6>

If you have any other comments or questions, please feel free to contact me directly.

Thank you for your time!

Best,

Kurt



A Matrix works well for faceted questions (no ILLiad queries here)

InterLibrary Loan Textbook Requests

**1. Why did you place a request for a textbook within the first few weeks of the quarter?
Please rank the importance of each factor in your decision:**

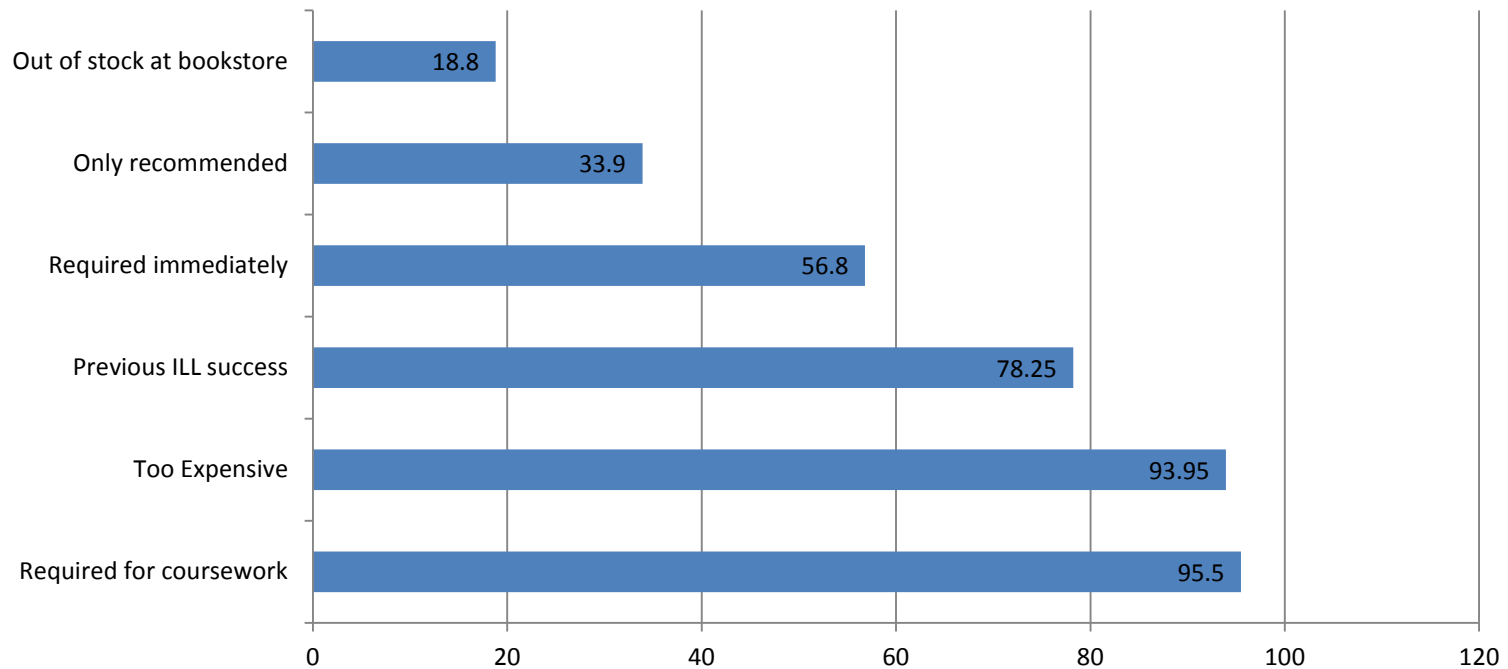
| | Not Important | Somewhat Important | Important | Very Important |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Item needed for coursework | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Item unavailable at bookstore | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Item required immediately | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Item too expensive to purchase | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Item only recommended for coursework | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Previous successful experience(s) with ILL | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | <input type="text"/> | | | |



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Results or what motivates the patrons

Why did you request a textbook on ILL? % Important or Very Important



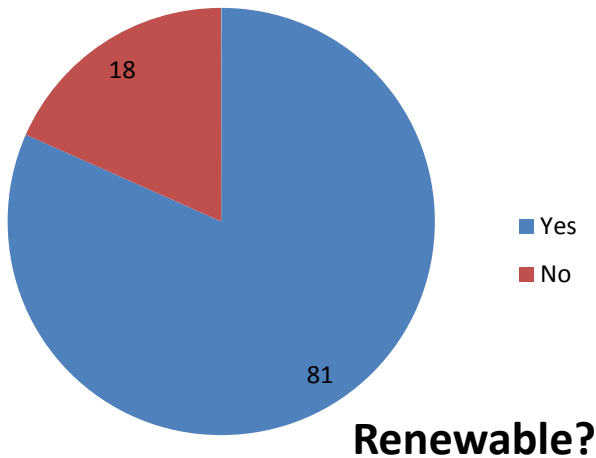


Let's start testing expectations against our ILLiad data

9. Did you expect that you would be able to renew the item?

Yes

No



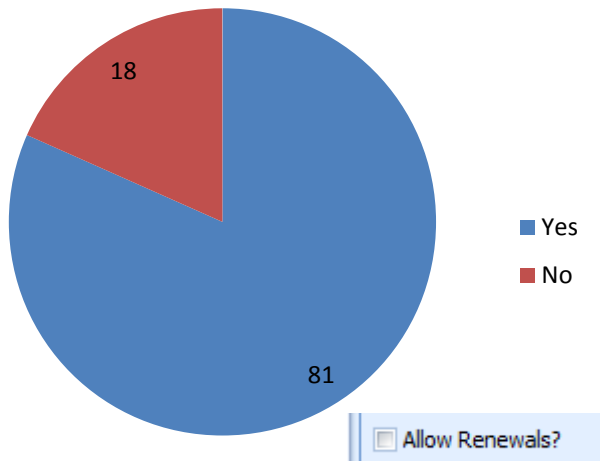
This is a very simple query. We look for the total number of Yes and total number of Nos in the Transaction Table Renewals Allowed field.

| | |
|----|-------------------------------------|
| d: | RenewalsAllowed |
| e: | textbook data test |
| t: | |
| v: | <input checked="" type="checkbox"/> |
| a: | Yes |
| r: | |



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ILLiad data says:



The query results showed 74% of the requests could be renewed, only 6% less than the patrons' expectations.



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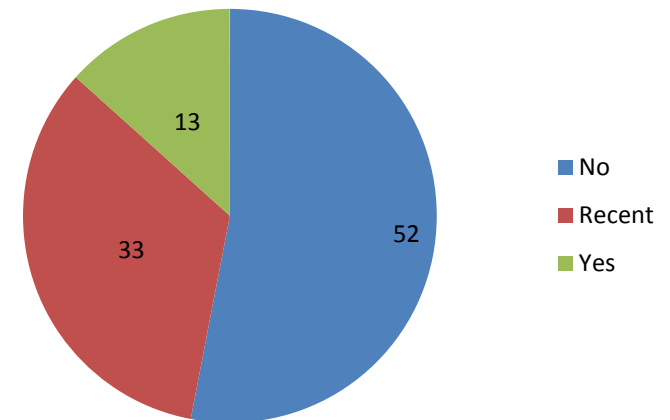
Will patrons accept an alternate addition?

6. Would a different edition of this book have sufficed?

- No, this was the edition specified by my instructor
- Only recent editions would be useful
- Yes, any edition would do
- Other (please specify)

Accept Alternate Edition

Different Edition OK? %



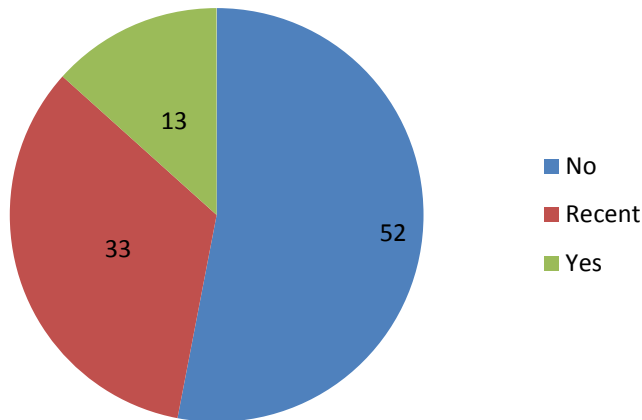
This is also a very simple query. Yes or No in the Transaction Table Accept Alternate Edition field are counted but the ILLiad is not as granular as our question is. We would need to review the request one by one.



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Will patrons accept an alternate addition? ILLiad Data says:

Different Edition OK? %



86% of the respondents unchecked the Accept Alternate Edition box in ILLiad.

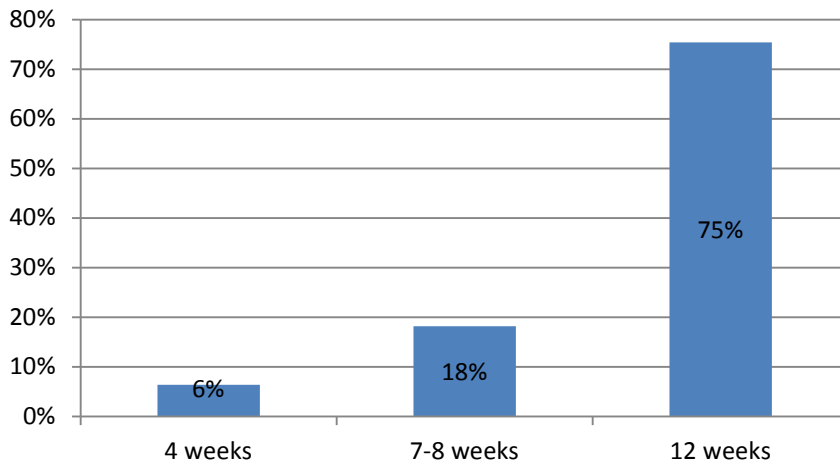


How long do they expect to keep a book? Can they?

7. When you requested the item, what were your expectations for loan length?

- 4 weeks
- 7-8 weeks
- 12 weeks / Full Quarter
- Other (please specify)

Expected Loan Period by %



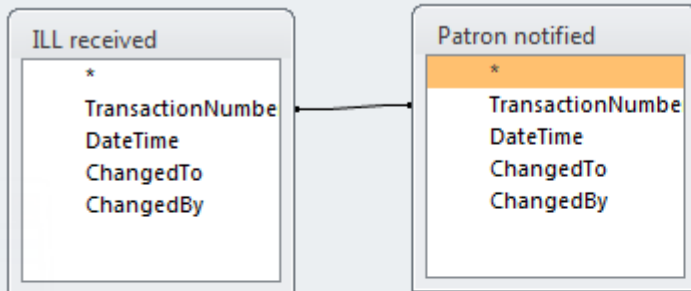
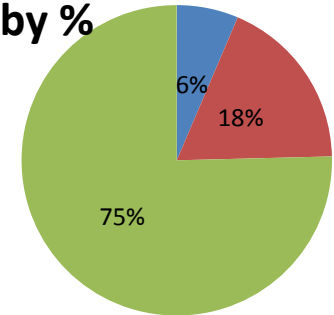
This query becomes more complicated to run but the data is in ILLiad. Basically we are looking at a datediff query finding the amount of time between the Tracking table “Customer Notified Via Email” and the Transactions DateDue values.



Extract the data into separate tables

- 16% have a loan of 12 weeks or longer
- 45% had a loan period between 7 and 12 weeks
- 22% had a loan period between 4 and 7 weeks
- 17% had a loan period less than 4 weeks

Expected Loan Period by %



| TransactionNumber | DateTime | DateTime | Expr1: DateDiff("n",[ill received.DateTime],[Patron notified.DateTime])/60 |
|-------------------------------------|-------------------------------------|-------------------------------------|--|
| ILL received | ILL received | Patron notified | |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

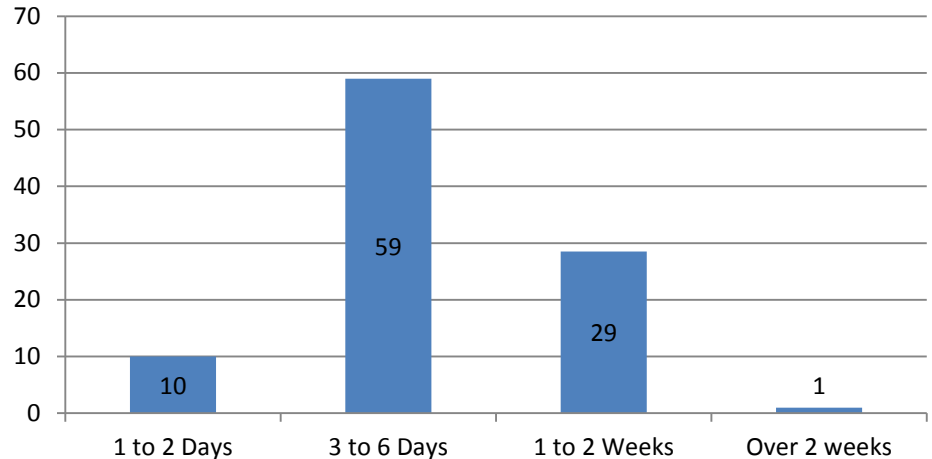


8. When you requested the item, what were your expectations for speed of delivery

- 1-2 days
- 3-6 days
- 1-2 weeks
- More than 2 weeks
- Other (please specify)

Once again, we are looking at a datediff query but this one is all in the tracking table.

Delivery Speed Expectations %





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The turnaround time between order placed and delivery.

| | | |
|--------|-----------------------|-------------------|
| 427083 | Submitted by Customer | 1/4/2013 11:08:05 |
| 427113 | Submitted by Customer | 1/4/2013 11:39:55 |
| 427121 | Submitted by Customer | 1/4/2013 11:52:11 |
| 427124 | Submitted by Customer | 1/4/2013 11:52:43 |
| 427140 | Submitted by Customer | 1/4/2013 12:06:47 |
| 427141 | Submitted by Customer | 1/4/2013 12:08:12 |
| 427150 | Submitted by Customer | 1/4/2013 12:15:38 |
| 427152 | Submitted by Customer | 1/4/2013 12:25:09 |
| 427265 | Submitted by Customer | 1/4/2013 3:22:28 |
| 427318 | Submitted by Customer | 1/4/2013 5:18:31 |
| 427335 | Submitted by Customer | 1/4/2013 5:41:04 |
| 427347 | Submitted by Customer | 1/4/2013 6:02:11 |
| 427352 | Submitted by Customer | 1/4/2013 6:39:08 |
| 427359 | Submitted by Customer | 1/4/2013 6:48:45 |
| 427361 | Submitted by Customer | 1/4/2013 6:59:44 |
| 427375 | Submitted by Customer | 1/4/2013 7:34:00 |

| | | |
|--------|------------------------------|----------------------|
| 425231 | Customer Notified via E-Mail | 1/10/2013 3:22:08 PM |
| 426779 | Customer Notified via E-Mail | 1/10/2013 3:22:44 PM |
| 427468 | Customer Notified via E-Mail | 1/10/2013 3:23:06 PM |
| 427121 | Customer Notified via E-Mail | 1/10/2013 3:22:49 PM |
| 427682 | Customer Notified via E-Mail | 1/11/2013 4:26:43 PM |
| 427411 | Customer Notified via E-Mail | 1/11/2013 4:26:42 PM |
| 430683 | Customer Notified via E-Mail | 1/25/2013 4:53:45 PM |
| 430681 | Customer Notified via E-Mail | 1/16/2013 5:50:42 PM |

For the patron, it's the difference between the date they submitted the request and the date they got it. Not when the request was updated to Request Sent.



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The \$64,000 question

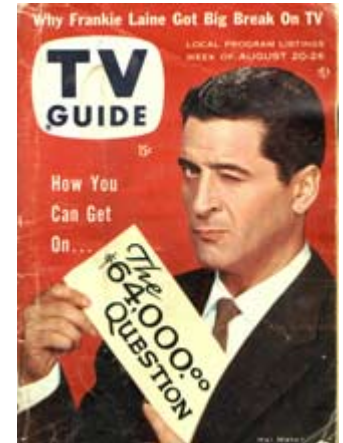
How many Textbook requests actually were filled?

62% of the request were filled (All ILL is 87%)

56% for Introduction to ... 10 ed. textbooks

82% for other required readings

This query looks for a blank due date. Unfilled requests don't have due dates. The type of book analysis requires a review of each title.



| | | |
|----|-------------------------------------|--|
| d: | DueDate | |
| e: | dbo_Transactions | |
| t: | | |
| v: | <input checked="" type="checkbox"/> | |
| a: | Is Null | |
| r: | | |



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What did we learn?

Even if ILL is not the best way for students to acquire their textbooks, it works **well enough** for them that they continue to use it. It meets their expectations.

Recognizing how important this service is to undergraduates, we made the following changes to our processes:

- distribute a list of textbooks we cannot order to the service desks at the beginning of each quarter.
- take more latitude with editions when ordering.
- have a special cancelation email for textbooks.



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Questions?

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