Library Lab 501 - Archives and Special Collections Class Request Tool Development

On November 1, 2013, the day following completion of our Library Lab funding period, we launched the Class Request Tool (CRT). We are pleased to have a product at the conclusion of this period, but also recognize that it is truly a beta release; there are refinements and features that we believe would help fully realize our vision for this tool in support of teaching and learning activities across Harvard's Special Collections and Archives repositories which are still needed.

FINAL QUARTER ACCOMPLISHMENTS:

- Integrated PIN authentication (refinements to this function are still required);

- Established a production site: classrequest.library.harvard.edu;

- Established a dedicated email account: CRTLibrary@harvard.edu;

- Established a group-monitored feedback form and response system via Google forms through g.harvard;

- Received addon files contracted from Atlas system to integrate Aeon with the CRT. Tested and refined the addon. Installed files across Houghton Library and the Harvard Map Collection;

- Employed our limited resources in testing the CRT: resolving numerous errors, refining logic, and engaging in a variety of our four user types' tasks and experiences to improve and alter them;

- Refined and expanded staff and user documentation;

- Held meetings with newly interested partners in Archives and Special Collections repositories across Harvard;
  (Phase one project partners include: Andover-Harvard Theological Library, Botany Libraries, Center for the History of Medicine, Francis A. Countway Library of Medicine, Ernst Mayr Library of the Museum of Comparative Zoology, Harvard Map Collection, Harvard University Archives, Houghton Library, Law Library, Historical & Special Collections, Schlesinger Library on the History of Women in America, Woodberry Poetry Room)

- Held a meeting with participating members of other Special Collections and Archives repositories at Harvard to collaboratively review the CRT in its production environment prior to launch;

- Created a program for on-site participant trainings and began engaging in one-on-one trainings with staff members who will be making use of the CRT;

- Begun "back entering" class data from this most recent semester to ensure complete FY14 data in the CRT;

- Created promotional cards for professors and other teaching staff to advertise the CRT;

- Solicited early use of the CRT with professors and other teaching staff. Additionally, prepared communication and established a personalized contact plan to advertise the CRT to those who have made use of Special Collections and Archives in their teaching in the past year.

FUTURE PLANS:

We have logged tickets in our project management space (Redmine) detailing refinements and features we hope to pursue in a beta release, as well as some critical bugs which require attention for optimum functioning of the CRT in its current incarnation. Our future plans would ideally include attention to all of the following:

EDITS/REFINEMENTS TO ALPHA:

- Address critical PIN authentication and log in issues
- Refine staff-side restrictions on access to user data
- Finalize notification rules for all auto-sent communications in production site
- Safe-guard staff edits to class requests left open in patron's browser
- Resolve display errors for navigational elements

NEW FEATURES IN BETA:

- CREATE ROBUST AND DYNAMIC REPORTING FUNCTIONALITY
  - Set reports to be generated include:
    - How many total classes per week/month/semester/year?
      * Subdivided by Harvard/non-Harvard
      * [Subdivided by School and/or department]
      * Subdivided by unique class name and multi-session classes with different materials
      * Subdivided by unique instructor (so we can find our BIG users)
      * Subdivided by repository
      * Subdivided by location (e.g. class at Widener run by Houghton)?
    - How many classes were collaborative (more than one repository involved)?
    - How many students by week/month/semester/year?
    - How many of each levels of "staff involvement"?

* Subdivided by repository
- How many classes started out homeless?
- How many classes changed hands (went from one repository to another)?
- Collated responses from submitted assessment forms
  * Subdivided by repository

- Provide options for generating new reports and/or extracting data without developer intervention
  - Create optional staff-side entry to capture details that may be desired for unique reporting requirements that vary by repository and/or institutional need over time
  - Provide options for repositories to create more dynamic assessment tools

- PURSUE COMPREHENSIVE USER TESTING
  - Usability testing for patron and staff roles (all four user types)
  - Assemble focus groups
  - Evaluate user experience feedback and identify areas for response that will inform further refinements and upgrades to the CRT

- DEVELOP AND IMPLEMENT AN IMPROVED USER INTERFACE
  - Pursue accessible design for the site
    - Consult with Harvard University Disability Services
  - Expand on initial branding and look & feel work
  - Implement a more functional mobile site design

- IMPROVE NOTIFICATION SYSTEM
  - Refine site-based control over automatically generated notifications
    - Provide for staff-side editing of notification templates as well as custom communications
  - Create staff-side opt in/opt out functionality for notifications
  - Provide for in-tool staff member to staff member direct communication prior to class assignment

- MAKE CRT AVAILABLE TO AND FUNCTIONAL FOR SPECIAL COLLECTIONS AND ARCHIVES COMMUNITY BEYOND HARVARD
  - To prepare for wider distribution: Conduct a full project review/clean up
  - Load code to GitHub
  - Create technical documentation in order to best support colleagues who may wish to implement the CRT in their own repositories
  - Improve and expand user documentation
  - Advertise CRT to colleagues for whom it may be useful

- GENERAL REFINEMENTS AND UPGRADES
  - Address priorities from user testing
  - Implement an integrated search functionality

- o Create option for course "cloning"
- o Resolve login and direct-to-course linking issues
- o Sync available staff lists with selected repository on staff-side
- o Provide staff view for classes by patron analogous to "My Classes" view
- o Create provision for multiple users to be affiliated with a class
- o Print CSS for:
  - ▪ Confirmed class details sheet for prof and user information
  - ▪ Staff notes
  - ▪ Assessments

Financial Update:

The allocated funds for this project went to the Berkman Center for Internet and Society; they managed the distribution of a portion of this budget to Atlas Systems in payment for our Aeon addon. Our initial development work for this project wrapped up October 31, 2013.