

Novice to Know-How Module Text

Course 7: Providing Access to Preserved Digital Content

Module 5: Providing User Guidance

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1. Introduction.

In this module we will look at the types of guidance we can offer users looking to access and reuse our preserved digital content.

This will include answering the following questions:

- Why should we offer user guidance?
- How can user needs analysis inform user guidance?
- What types of user guidance can be offered?

So let us start with the question: why should we offer user guidance?

2. Why Offer User Guidance?

The provision of user guidance is not a new issue for archives and libraries. User guides for physical collections have long been available via poster displays, leaflets, and, increasingly, on web pages.

However, a number of additional barriers exist for users looking to gain access to digital content, and so a well-considered approach to user guidance is essential. These barriers may include:

- New and unfamiliar catalogues and discovery mechanisms.
- A lack of the technological skills needed to open and reuse digital content.
- No access to the software needed to open and reuse digital content.
- Confusion around how digital data can be reused and/or shared.

Therefore, user guidance should be provided where possible, so users know how to find and access digital content of interest.

3. How User Needs Analysis Can Help.

An understanding of what user guidance may be needed to help provide access should be a key outcome of the user needs analysis work described in the previous module on the topic. That is, our user needs analysis should provide us with information on our key user groups and for each one identified:

- What types of digital content they will be interested in.
- Their level of skill in relation to accessing and using of digital content
 - Including the types of software they can use/have access to.
- How they might wish to access and reuse digital content.

From this we can build a picture how much user guidance we will need to provide, what topics it should cover, and what level it should be pitched at.

4. Types of User Guidance to Consider.

With the information provided by user needs analysis in hand, we then need to consider exactly how to structure our user guidance so that it is easy for our users to access and digest. To help with planning, it is useful to separate user guidance into two main types: guidance on our access systems and resource discovery, and guidance on how to use the digital content itself.

You also need to consider what formats you will provide your user guidance in. Will you have information online? Will there be downloadable or printed versions? Do you have the capacity to take things further and create some video content or offer training sessions for users?

In the next section we will look in more detail at two main types of user guidance, and the information you may consider including.

5. User Guidance on Access Systems and Resource Discovery.

The first type of user guidance we will focus on will help users familiarize themselves with systems for discovering and accessing digital content of interest. This is perhaps the most essential form of user guidance.

There are many issues that can be covered by this type of guidance, and how much is needed will be dependent on both your key user groups and how complex your access systems are.

On each of the following slides we will focus on a particular topic that can be addressed by user guidance in relation to access systems and resource discovery.

6. Getting Started Guide.

Perhaps the most common style of user guide offered is one that can be characterized as a "Getting Started" guide. This is a user guide that provides a high-level overview of the access system and the basic steps required to find and access content of interest.

A Getting Started guide might include:

- A brief description of the types of digital content in the collections,
- How to carry out a simple search,
- An overview of a catalogue record,
- The basics of accessing content of interest once it has been identified.

Producing a Getting Started guide is a great first step in helping users understand how to access your digital content. Most organizations will post a Getting Started guide on their website, but you may also consider creating a video walking users through the access systems, offering training sessions, or printing copies to include next to onsite access workstations.

7. Resource Discovery Systems.

Once you have a Getting Started guide in place, you can start to build more detailed user guidance. One area to address will be resource discovery. Your approach will be dependent on the complexity and types of resource discovery systems available. If you are using the same resource discovery system for digital content and analogue materials, you will likely only need to make minor updates to existing guidance to ensure it covers any information specific to digital content.

If you have a separate access system for digital content, and it is relatively simple, you may wish to focus on advice about how to enter searches that will produce more relevant results, for example using Boolean queries or filters. There may also be a deeper dive into the information contained in a catalogue record.

If you have more complex access systems, perhaps with multiple resource discovery mechanisms, you might create separate guides for each route into the content. The guidance may also highlight which resource discovery mechanism is most successful for finding digital content of a particular type or on a certain subject.

8. Accessing Digital Content.

One issue that is important to cover in user guidance, is how users will gain access to the digital content itself.

Can they access content remotely online, or is it only available onsite at your organization? Can digital content be downloaded directly from your access system by the user, or will they need to submit a request? How long will requests take to fulfil, and how will content be delivered? And if content is only available onsite, will they be able to take a copy away with them?

Providing this information will not only make the process clear to users, but also help with setting expectations about how quickly they will be able to gain access. As mentioned in previous modules, direct online access to digital content is not always possible, or even desirable. If access is onsite only, user guidance should also include details of how to get to the relevant location(s) and opening times.

9. Reuse of Digital Content.

Another role of user guidance is providing clarity about how your digital content can be reused. This is particularly important if users are able to download or make copies of the digital content in your collection as these can easily be transferred, shared, and potentially altered.

Guidance should clearly set out the purposes for which content can be reused:

- Without requiring any explicit permissions,
- For free but under licence,
- At a cost under licence.

If any costs do apply to reuse, these should be clearly outlined.

Noting where privacy issues will affect reuse is also important. Guidance should inform users of how to identify digital content which may include sensitive information. For example, explaining where such information can be found in a catalogue record.

10. Depositor Guidance.

It can be useful to include some Depositor Guidance within your user guidance. The process of accessing content can often be inspiration for users to offer content of their own.

Your depositor guidance might sit wholly within your user guidance, alongside information on access, or you may wish to simply include a link to where more information can be found. More on what should be included in depositor guidance is covered in the “Select and Transfer Digital Content” course of the Novice to Know-How learning pathway.

11. Accessibility Statement.

As mentioned in the module on Accessibility, it is good practice for all, and essential for public sector bodies in the UK, to include an accessibility statement on their website. If you publish your user guidance online you should either include your accessibility statement [here](#), or clearly link to it.

As to what to include, an accessibility statement should:

- List any inaccessible parts of the website or app,
- Show how people with access needs can get alternatives to content that is not accessible,
- Provide details on who to contact to report accessibility issues,

- Provide information on the enforcement procedure if people are not happy with the response,
- Be published in a fully accessible form,
- Follow a consistent form.

12. User Guidance on Using Digital Content.

Once you have created user guidance on how to find and access digital content in your collections, you may wish to go a step further and develop guidance on how to use and interpret the digital content itself. Again, you can explore if this is needed during a user needs analysis exercise by identifying if your user groups have common core digital skills.

This type of guidance may focus on two key topics: the technical process of opening and interacting with the digital content, and the interpretation of the information contained within it. Over the next few slides we will look at how we can address these two issues in a little more detail.

13. Guidance on Opening and Interacting with the Digital Content.

The need for guidance on opening and interacting with digital content will depend on two factors: the skills you might expect a user to have, and the complexity of the digital content type. For example, we might expect most users to know how to open a JPEG image, but, depending on the user group, they may require more assistance with Computer Aided Design (CAD) content.

A basic level of guidance would be a short description of the type of content, and examples of software that can be used to open it. It is particularly useful to share information on suitable free software if it is available. Links to user manuals or online tutorials from third parties could also be included.

You may also wish to develop your own guide to key functionality. This could take the form of a step-by-step guide, or video demos. While this can be a great help to users, it can be resource intensive to create and maintain, so should be considered an advanced option. Staff might also be trained in the basics of using the software, to be able to help users onsite.

14. Guidance on Understanding the Information Content.

In addition to providing more technical guidance on using digital content, we can also provide guidance to help users understand the information content. This type of user guidance is obviously also offered widely for analogue, physical collections too, but with the unique opportunities available to manipulate and process digital information there are additional possibilities to cover for users.

For example, to understand the contents of a spreadsheet the user might need to know how to view and understand the underlying formula.

It might also include information on tools and techniques for data analysis, allowing users to manipulate the preserved digital content to meet their own research needs. This is quite an advanced form of user guidance that may be developed as your digital preservation program matures.

15. User Case Studies.

One way to format user guidance, particularly when covering how to use the digital content itself, is to employ case studies. The case studies can profile common user roles, why those users wish to access content, how they find what they are interested in, and how they use the digital content.

This approach is often more attractive to new or inexperienced users, as it puts the process in context in a way that standard guidance does not. It can then be easier for users to understand how to translate what they have learned into practice.

The basic information for case studies can be gathered during user needs analysis, but make sure to gain permission for its reuse in this format from participants.

16. Glossary.

In addition to the more “how to” focused user guidance, you may wish to include a Glossary of terms that may not be familiar to your users.

The glossary may include terms relating to:

- Elements of the access system, particularly technology-focused terms,
- Archives, libraries, and information management more broadly,
- The subject matter of the digital content.

You may wish to separate the terms covered by the first two points into a separate glossary from those relating to the third point. This decision will depend on the number of terms to be included and your overall approach to user guidance.

When creating a glossary, remember to ensure that it is consistently laid out, easy to navigate, and the definitions are simple and clear without any jargon. It is also worthwhile investigating if relevant glossaries already exist that can be reused, rather than duplicating effort.

17. Staff Help and Contacts.

You should also include information on the support available from staff at your organization, and contact details of how to get in touch. This is both to help users and to help set expectations.

Make it clear what staff are available to help with. This may include (or exclude):

- The process of finding digital content,
- Gaining access to identified content,
- Making copies of content,
- Interpreting content.

To help manage demand, you may wish to have posted “office hours” or scheduled drop-in sessions, either in person or online, when users can expect to have access to staff help.

18. Module Summary.

User guidance is particularly important when providing access to digital content to help users overcome the barriers they may face in identifying, accessing, and reusing content of interest. Results from user needs analysis can help us understand what user guidance will be needed, as well as providing information for user case studies.

There are two types of guidance we can offer: help with using the access systems themselves, and help with using the digital content.

User guidance on the access systems can cover issues such as “getting started”, resource discovery, accessing the content itself, conditions for reuse, and accessibility, as well as including or linking to guidance for depositors.

User guidance on the digital content can aid users with identifying software to allow them to use the digital content and give instructions on how to operate it. It can help with understanding the information contained within the content, although this is an advanced form of user guidance.