

# **Online Tutorials: delivering training in VDX Document Delivery to end users - on campus, off campus and off shore**

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***Abstract:***

*La Trobe University Library provides interlending and document delivery services to academic staff and postgraduate students located in campuses and research centres in the Melbourne metropolitan area and regional Victoria, as well as remote off campus students throughout Australia, and off shore students predominantly in China and Vietnam. In 2004, the Library implemented VDX software to manage all interlending and document delivery requests. ZPortal, the web based customer interface, provides request management and desktop delivery of documents. This paper describes the experience of developing online tutorials, in response to the need to provide a simple training solution for all end users in the use of this new system.*

## Introduction

La Trobe University was established in 1967 and currently provides higher education to 27,194 students across the main campus at Bundoora, the City Campus; regional campuses at Bendigo, Albury/Wodonga, Shepparton, Beechworth, Mt Buller and Mildura; remote off campus students and off shore students, predominantly in China and Vietnam. The Library provides an Interlending and Document Delivery service to support teaching and research, for academic staff, undergraduate distance, and all postgraduate students. In 2003, the Library implemented VDX software from Fretwell-Downing Informatics to manage all interlending and document delivery requests. ZPortal, the web based customer interface, provides request management and desktop delivery of documents. Online tutorials were created in response to a need for a simple training tool to assist all clients - both locally and overseas. This paper describes the journey from implementation of the software, complete with face-to-face instruction, through to the exploration and production of the final audio/video tutorial.

## Literature Review

A review of the literature was carried out to investigate the current depth of online tutorial activity in academic libraries, and to gather information to determine the most effective method of creating the tutorials. Online tutorials have been produced or purchased as commercial products for library instruction in many universities. La Trobe University's *Library Skills Online* interactive tutorial is a commercial product, purchased from Web-ezy Solutions Pty Ltd, and can be accessed at <http://www.lib.latrobe.edu.au/libskills/>. There are many examples of text only tutorials, available for viewing on public web sites. An excellent example is accessible at the University of Wisconsin Eau-Claire <http://www.uwec.edu/library/tutorial/index.html>, titled *FYI Research Tutorial*. A Camtasia tutorial titled *Mrs Sterling's Word Pad* is accessible at <http://www.sabrinasterling.com/videos.html>, this was created to assist high school students practice word processing skills (Minkel, 2004).

References were retrieved that describe very practical and technical aspects of online tutorials. According to Cox (2004, p195), Crowther and Wallace (2001) were the first to write about streaming media for library instruction by producing a video tour of the library at the University of Tennessee. Cox (2004) compares his experiences using live video to Camtasia Studio, and determined that the Camtasia software offers a product, similar in function, easier to use and lower in cost. Cox produced a Camtasia online tutorial titled *Using Interlibrary Loan* for the Worcester Polytechnic Institute in Massachusetts, however this was unavailable for viewing.

Good elements of library instruction and methods outlining applications transferable to the online environment were outlined by Dewald (1999, p.26). Some of the most important issues applicable to development of the online tutorials include:

- students' perception of immediate benefit from the tutorial.
- clarification of objectives with the overview of where the tutorial is headed.
- the ability to offer tutorials in more than one medium e.g. live, auditory or visual.

Viggiano (2004, p.38) notes the blurring lines between distance and traditional students, and that *students studying on campus engage in the library experience as if they were distance learners*, whilst Debowski (2000, p.176) talks about the new class of library user – the *Hidden User*, and the important issue of library services becoming *increasingly marginalised and hidden*. Both papers highlight the changing environment between the library and the library client, and the associated complexities of online access, interaction, and service delivery.

The identification of the audience and purpose, and the assumptions of the students' level of technical and or academic knowledge, is another important factor when creating tutorials. (Lee and Burrell 2004, p.21). Debowski (p.179) discusses the ongoing issue of the difficulty that libraries face in assisting users to become information literate.

## **Interlending and Document Delivery**

La Trobe University Library operates a de-centralised Interlending and Document Delivery service at the Bundoora, Bendigo and Albury/Wodonga campuses. The web site can be viewed at <http://www.lib.latrobe.edu.au/document-delivery/> The Albury/Wodonga and Bendigo campuses operate the service for staff and students independently. The main campus at Bundoora manages the requests for staff and students on campus, as well as the City Campus, Mt Buller, Shepparton and Mildura campuses; five clinical teaching schools in metropolitan hospitals and health centres; two major off site research centres; remote off campus, and off shore students. This service provides intercampus copying services; copy and loan from the local collection to off site patrons; and copy and loan from external libraries both locally and overseas. Approximately 30,000 requests for loan and copy are processed annually by document delivery staff across the three campuses.

A table illustrating the numbers of staff and students eligible for interlending and document delivery services in 2005 is shown in Appendix 1 – *User Groups*:

### **VDX - ZPortal**

VDX document delivery software has been implemented in over sixteen academic and state libraries within Australia and New Zealand. VDX interoperates with the Libraries Australia Document Delivery System, which enables VDX libraries to participate in National Resource Sharing activity. ZPortal, the web based customer interface, provides request management and desktop delivery to the end user, and was made available to eligible staff and students in April 2004.

To use the service the patron needs to register via an online registration form. An email confirming registration, login and password is sent; this also directs the patron to the Document Delivery web site, and the online tutorials.

The local catalogue is configured into the default search profile, to enable checking of local holdings, including the Library's electronic journal sets. Three catalogues are available as the default search profile: La Trobe University, the National Library of Australia, and the Library of

Congress. The catalogues were selected to give patrons access to local holdings, whilst giving the broadest possible coverage to enable a record to be retrieved and ordered. There is a blank request form available as a backup option for material not found on the catalogues. The catalogues are available as a source of data only; the system then automatically searches the record on the National Bibliographic Database for holding libraries.

Patrons on campus use ZPortal to access books and journals locally prior to making a request. Interlibrary loan books are delivered to the home library for patron collection, and books for off site patrons are posted or delivered by courier. Documents are scanned to the document store for online retrieval by all patron user groups - on campus, off campus and offshore. Another useful function of ZPortal is request tracking, a feature that enables patrons to check the progress of requests via status messages.

## **ZPortal Training**

During the implementation stages, it was apparent that training would have a major impact on successful use of the system. Initially training sessions were held, but due to staffing constraints, this was not sustainable in the long term. Training and assistance options included:

- face-to-face training.
- tailored user guides.
- frequently asked questions.
- document viewing instructions.
- online help or email.

It was evident that patrons on campus were using the online help or email for assistance, in preference to on site instruction, and that many patrons, regardless of physical location or status, preferred to seek help online.

## **Remote Students**

Of particular concern was the delivery of adequate training to remote off campus and off shore students, and the ability of these patrons to use the system efficiently. Although the user guide was well constructed, with appropriate screen dumps, clear language, and well placed instruction boxes, a simpler training solution was required. The challenge for the Library was to deliver clear and comprehensive training in a format that enabled all staff and students to learn how to use the system quickly and efficiently without the need to attend formal on site training.

Online training delivery with a systematic approach would enable all students to familiarise themselves with the system, and could be accessed when and as often as required.

## Camtasia Studio

Camtasia Studio screen recording enables demonstration and teaching through audio and video. It would provide the ability to talk to the audience, explain the operation of the ZPortal software and demonstrate the functions of the Document Delivery web site, using screen recordings and mouse pointers. The Library purchased Camtasia Studio Version 1.1.1 in 2003, when an initial tutorial was created for distance nursing students. With the software already available and ready for use, the following positive features confirmed selection of this product would meet the need:

- positive in-house experience, a tutorial had been created for distance nursing students and was well received.
- inexpensive, and with practice easy to use.
- the literature confirmed that Camtasia would be able to produce the desired tutorial.

Camtasia Studio creates professional videos of personal computer desktop activity in real time. Files can be published in Flash, CD-ROM or streaming video format. Camtasia can be viewed at <http://www.techsmith.com>. The screen capture program was used to produce the tutorials, to enable full motion activity of the library's web site and interaction with the ZPortal document delivery system. The audio and screen capture components simultaneously guide the patron through the search, request and order process.

The software suite includes a screen recorder and video production tool – Camtasia Recorder and Camtasia Producer. The video is recorded, saved and then produced ready for loading on to a server, and made available to the patron via a link on the Library's web site. The patron views the video via streaming media, described by Mortenson (2000, p.37) as *an audio/video presentation delivered across a network in such a way that it is viewed while being downloaded onto the user's computer*. Most students are familiar with audio/video film clips delivered over the Internet. When the user clicks on the link to the tutorial, a request is sent to the server containing the file to begin downloading the media to the desktop. Streaming video, or more aptly described by Crowther (2001, p.280), is a continuous stream of video after only a few (typically 10-30 seconds) for initialisation required to commence the download. The video can be viewed whilst the file is downloading or streaming (Cox, 2002, p.40).

The Online Tutorials are Flash files and require Macromedia Flash, and a sound card, in order to hear the tutorial. Instructions for free download of Macromedia Flash are available as a link on the Document Delivery online tutorial web page.

In December 2004, the campus libraries at Albury/Wodonga, Bendigo and Bundoora operated under individual library web sites with an umbrella Library Home Page incorporating all sites. The Library was moving to a single library web site, with an expected completion date of July 2005. Consideration was given to the expenditure in staff time in creating tutorials that would need to be reproduced the following year, to reflect the new web pages. The decision was made to proceed with the initial tutorial project, as there would be immediate benefits to library staff and document delivery patrons:

- the tutorials would alleviate the pressure on the training staff.
- provide immediate twenty-four hours a day assistance for patrons.
- act as a prototype for the new Document Delivery web pages in 2005.

## Writing the Scripts

The scripts were tailored for each user group, taking into account the Library privileges and delivery modes of each user group. See Appendix 1 – *User Groups*. Each scripted text launches straight into the topic: *To request journal articles, book loans or chapters, students must use the Interlending and Document Delivery Service*. The end user is guided to the Library web site where the cursor points and clicks on the Document Delivery Link, where the registration process is explained. Proficient operation of the mouse is required to point out critical links. In the case of City Campus, research centres and hospital clinical schools, further information is requested to ensure that location details for delivery of book loans are accurate. The patron is returned to the Document Delivery web site and instructed to login. The web page layout was slightly different in December 2004, as patrons accessed ZPortal via the *Search and Order* link. The integration of the Library web sites brought about improvements in the layout of the information, with the ZPortal login being positioned prominently on the Document Delivery web site for easier interpretation and navigation by end users.

The next step in the script was to guide the end user through the process of searching the catalogues, and placing a request from a search result. The *Create Request* option is explained, and the automatic received email alert is displayed, which prompts the patron to login and retrieve the journal article or collect a loan. The tutorial simulates the entire process of a real requestor searching, ordering and retrieving documents, whilst navigating between the Document Delivery web site and ZPortal.

Production pausing (F9) and natural pauses were written into the text. At various stages during production, the F9 function was used to turn off the screen capture whilst the system completed loading or searching. The conclusion of the video captures the Document Delivery web page, explains the various help options available, including contact details for the three main campus' document delivery units. See Appendix 2 - *Online Tutorial Script*

## Stage One Tutorials

In December 2004, the first of five tailored Flash tutorials was produced and uploaded to the public web site, to provide a firmer interpretation and understanding of the operation and benefits of the new document delivery system. The simple systematic directions give a conceptual understanding of the process required to search, order, track requests, and retrieve documents. Design and content were considered, and the tutorial was kept short and concise:

- only one example of request activity is shown.
- the full download of an electronic journal article is excluded.
- only two pages of the final scanned article are displayed.

The script described in clear and simple detail, the process used to search the catalogues for either a book or journal, and place a request from the search result. Electronic journal articles can be retrieved, without the need to recheck the catalogue, and this function is clearly explained in the tutorial. A test patron record was established to capture the video. Requests created during preparation, were deleted prior to the each screen take, to reduce duplication and confusion for the end user.

The journal title chosen for the tutorial production was carefully selected in order to produce a neat search result, with a title that has a hard copy and an electronic record to demonstrate access to the Library's electronic databases through the ZPortal interface.



On selection of a journal to scan for the tutorials, the physical appearance of the journal was taken into account, to ensure a neat and clean A4 sized journal article is displayed.

Considerations for successful audio video production:

- physical surroundings - the tutorials were produced throughout the December period, when there were fewer students in the Library however, the software is very sensitive to sound - coughs, library announcements and interruptions can all filter through, and interfere with production.
- two people are required - the reader, operating the start, pause and stop buttons, and another person, to operate the mouse and check the recording button. As this tutorial requires interoperation of two systems, both members of staff need to be familiar with the script, the operation of Camtasia, ZPortal and Interlending and Document Delivery, to ensure efficient navigation between the sites.
- successful mousing must mirror the spoken text exactly, to ensure that the user understands the concepts. On completion of recording, the file is saved, the movie produced, then uploaded to the web server as a Flash file.
- consistent voice quality is necessary to ensure superior audio function.

The first tutorial was created for the City Campus patrons, and subsequent tutorials were customised and recorded for each user group. In this first stage, tutorials were created for the Bundoora campus, off site research centres, clinical schools, off campus and off shore students. It took approximately three hours to complete each four-minute tutorial.

## Stage Two Tutorials

The new integrated Library web site went live in July 2005. On completion of the redevelopment of the web site, all tutorials had to be reproduced. This was a good opportunity to check, edit and refine the previous tutorials, and to include the campuses at Albury/Wodonga and Bendigo, and the undergraduate nursing students, now based at Clinical Schools in the Austin and Alfred Hospitals. All scripts were reviewed and revised (reduced to three minutes), and adapted to reflect the one Library site. The online tutorials can be viewed from the Library web site: <http://www.lib.latrobe.edu.au/document-delivery/user-guides.php>

# Library

[Library home](#) » [Document Delivery](#) » [User Guides & Tutorials](#)

## Interlending and Document Delivery Service

### User Guides and Online Tutorials

The following User Guides are PDF files and require [Adobe Acrobat Reader](#) on your PC in order to be viewed.

The Online Tutorials are Flash files and require [Macromedia Flash](#) on your PC. Your PC also requires a sound card in order to hear the tutorial.

User Guides	Online Tutorials (approx 3 minutes)
<a href="#">Albury-Wodonga</a>	<a href="#">Albury-Wodonga</a>
<a href="#">Alfred/Austin Nursing Students</a>	<a href="#">Alfred/Austin Nursing Students</a>
<a href="#">Bendigo</a>	<a href="#">Bendigo</a>
<a href="#">Bundoora</a>	<a href="#">Bundoora</a>
<a href="#">City Campus</a>	<a href="#">City Campus</a>
<a href="#">MCHR, Bouverie, Clinical Schools</a>	<a href="#">MCHR, Bouverie, Clinical Schools</a>
<a href="#">Off Campus</a>	<a href="#">Off Campus</a>
<a href="#">Off Shore</a>	<a href="#">Off Shore</a>

## Evaluation

A formal evaluation has not been conducted, but the benefits have been positive. On site training sessions have ceased, a saving of four to five hours in staff time per week. Prior to production of the online tutorials, training on campus was conducted three times per week, as well as visits to off site research centres and campuses. The number of requests for help (telephone, email and in person) have reduced considerably. Most requests for assistance now involve forgotten passwords - not issues relating to operation of the system, which are covered by the tutorials. Accurate figures are not available to demonstrate the reduction in requests for assistance; however, based on observation, a conservative estimate would be 50-60%.

During evaluation, the advantages and disadvantages were discussed, and problems clarified for further review.

## **Advantages**

- saving in staff time – both training and assistance. It is difficult to estimate the amount of time spent assisting patrons by telephone, email and in person. When the system was first implemented, there was no staged implementation of user groups, all groups were given access to ZPortal simultaneously, consequently staff were sometimes overwhelmed with requests for help. Appendix 1 depicts the volume of eligible users.
- inexpensive software. The current price for Camtasia Studio and SnagIt single user licence is US\$319-00 <http://www.techsmith.com/purchase/order/bundle.asp?csel=0>
- audio – talks the patrons through the process.
- high quality crisp screen capture with the cursor as a guide. The cursor is moved in time with the speaker, and can be used as a pointer to emphasise any aspect of the process.
- video format – easy and comfortable for end users to click, listen and learn.
- fast – the tutorial takes three minutes, sometimes longer depending on Internet speed.
- can reach unlimited number of users at any given time. The tutorial can be accessed by patrons locally or overseas.
- flexible learning environment to meet individual need. Patrons can listen to the tutorial as many times as necessary, as some patrons do not regularly request material, and can use the online tutorial as refresher training.
- available on demand, online 24 hours per day.

## **Disadvantages**

- bandwidth is a problem for remote and off shore students; audio uses more bandwidth than text or graphics, loads slowly, thereby reducing the smooth delivery of the tutorial. The tutorial has been tested on a home computer using a dial up connection; although the screens took longer to load, the tutorial was still instructional.
- difficulty in creating a completely professional finish. Practice is vital to produce a professional product; whilst librarians are not trained in audio/video production, attention to voice quality and diction is vital. It is important to ensure that ample time is allowed to concentrate on production of online tutorials.
- changes made to either the Library or ZPortal screens, require the tutorials to be updated quickly to ensure that accurate information is delivered. The editing functions need to be practised and streamlined to attend to alterations quickly when required, otherwise incorrect information is being streamed to patrons.

## **Conclusion**

It has been satisfying and challenging creating the tutorials. Camtasia Studio is inexpensive, easy to use; and with a little practice, the possibilities for librarians and educators are limitless. With help from colleagues in the Library, eight low-cost tutorials have been produced in response to this need. Feedback from clients has been positive, and the online tutorials have contributed significantly to reduction of constant pressure on staff in Interlending and Document Delivery. Follow up help is crucial to support the online tutorials, and requests for assistance are answered promptly, thereby providing further support to the Library's clients.

## **Acknowledgements**

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## **Web Sites**

Camtasia Studio, viewed 2004-2005

<http://www.techsmith.com/>

Fretwell-Downing Informatics, viewed 13 January 2006

<http://www.fdisolutions.com/portals.html>

La Trobe University Library – Interlending and Document Delivery Service and Tutorials

<http://www.lib.latrobe.edu.au/document-delivery/>

<http://www.lib.latrobe.edu.au/document-delivery/user-guides.php>

La Trobe University, Management Information Unit, viewed 16 December, 2005

<http://www.latrobe.edu.au/stats/pages/statistics.html>

La Trobe University Library, Training, viewed 12 January, 2006

<http://www.lib.latrobe.edu.au/libskills/>

Mamie Lou Gross Elementary School in Woodbine, GA, viewed 12 January 2006

<http://www.sabrinasterling.com/videos.html>

University of Wisconsin Eau-Claire, viewed 12 January, 2006

<http://www.uwec.edu/library/tutorial/index.html>

## Appendix 1 – User Groups

The following table shows the range of user groups eligible for interlending and document delivery services in 2005.

Details of statistics can be viewed at the La Trobe University web site:

<http://www.latrobe.edu.au/stats/pages/statistics.html>

<b>Campus or User Category</b>	<b>Undergraduate Students</b> Not eligible for Document Delivery (except Offcampus)	<b>Postgraduate Students</b> Eligible for Document Delivery	<b>Academic Staff</b> Eligible for Document Delivery	<b>Total eligible for Interlending &amp; Document Delivery</b>
Bundoora Campus	14,021	<b>4,100</b>	<b>974</b>	5,074
Bendigo Campus	3,334	<b>632</b>	<b>220</b>	852
Albury/Wodonga Campus	853	<b>251</b>	<b>51</b>	302
City Campus		<b>459</b>	<b>41</b>	500
Clinical Schools & Research Centres		<b>94</b>	<b>49</b>	143
Mildura Campus	267	<b>53</b>	<b>11</b>	64
Mt Buller	95		<b>3</b>	3
Shepparton Campus	219	<b>72</b>	<b>6</b>	78
Off Campus students	<b>876</b>	<b>1,431</b>		2,307
Off Shore students		<b>437</b>		437
<b>Total:</b>	19,665	<b>7,529</b>	<b>1,355</b>	<b>9,760</b>

## Appendix 2 - Online Tutorial Script

To request books, chapters, or journal articles from other libraries, staff & students must use the Interlending and Document Delivery Service. You will first need to register. From the Library home page, select Document Delivery. **PAUSE** Complete the Online Registration form, you will receive an email confirming your user id and password. **PAUSE F9**

To make a request, return to the Document Delivery web page and SIGN IN with your user Id and password. **PAUSE F9**

### Interlending and Document Delivery Service

La Trobe University Library's automated document delivery system is designed to manage all your interlending and document delivery requests. This service is available to postgraduate students and academic staff with a [restricted service](#) available to undergraduate students.

User ID:	<input type="text"/>	<input type="button" value="Sign In"/>	No Password? <a href="#">Register here</a>
Password:	<input type="text"/>		<a href="#">Forgotten Password?</a>

From the Advanced Search Screen, enter the title of a book, or journal. Using quotation marks around the title will help refine your search. **PAUSE F9** Click on *Go* **PAUSE F9**

Find the title that matches your request exactly, regardless of where it is held. If a book is held at your campus library, collect from the shelves. If held at another campus library, place a request for an intercampus loan from the Loans Desk, by telephone or complete an online form, available under *Request forms* on the library home page. If the book is not held, click on *Get it*.

<b>1. Inuit journey / by Edith Iglauer.</b>
Date: 1979      Collection: Voyager at LoC
<a href="#">Save</a> <a href="#">Details</a> <a href="#">Get it!</a>
<b>2. Inuit journey : the co-operative adventure in Canada's north / Edith Iglauer.</b>
Date: 2000      Collection: Voyager at LoC
<a href="#">Save</a> <a href="#">Details</a> <a href="#">Get it!</a>

If a journal title is held at La Trobe University as an electronic journal, you can check to see if the article you require is available by clicking on *Details* and scrolling down to the link at the bottom of the record. **PAUSE**


<b>2. Journal of palliative care [electronic resource].</b>	HTTP
Date: 1985      Collection: OPAC @ La Trobe University	
<a href="#">Save</a> <a href="#">Details</a> <a href="#">Get it!</a>	

If it is not available electronically, click on **Get It**. Complete all citation details. **PAUSE F9** Click on **Submit** and accept the copyright conditions on the following page.

If you cannot find the title in **Advanced Search**, you can use the **Create Request** option, a blank form, accessible from the left menu bar. Select book, journal or other, and complete all citation details. **PAUSE F9**

**SHOW EMAIL ALERT** When your book or article is available, you will receive an email alert. Books are collected from Document Delivery during business hours, or after hours from the Information Desk.

To download journal articles, you will need to sign in with your user id and password. **PAUSE F9** Click on **My Requests** and **Go**. Locate the relevant request and click on **View**.

<a href="#">View</a> 	
<b>ILL Number:</b>	547736
<b>Title:</b>	<b>New trends in conceptual representation : challenges to Piaget's theory?</b>
<b>Author:</b>	edited by Ellin Kofsky Scholnick
<b>Status:</b>	Received
<b>Need-by Date:</b>	19 Mar 2006
<b>Attached Documents</b>	
	1: TIFF picture

Double click on the TIFF picture at the bottom of the page to view your document. It is important to remember that your document is available for 10 days from the date of the first viewing; therefore, it is advisable to print your document when you first access it. **PAUSE F9**

There are several help options available on the Document Delivery web page:

- print out the User Guide
- consult the **Document Viewing Instructions**
- check the **Frequently Asked Questions**
- complete an **Online Help** form

For further assistance, please contact Interlending and Document Delivery by email, or telephone between 8.30-5pm Monday to Friday.