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Abstract

Reader training constitutes an important component of library services. This article analyzes the various stages of reader training work through practical examples, pointing out that literature and information specialist teams and self-service training platforms play significant roles in training activities, thereby providing references for libraries to effectively conduct reader training.

Full Text

On the Process Analysis of Reader Training

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Abstract: Reader training constitutes an essential component of library services. Through a detailed examination of a complete reader training cycle, this paper analyzes the key considerations at each stage of the training process and underscores the vital role played by intelligence commissioners and self-help training platforms. The findings provide practical references for libraries seeking to conduct reader training programs effectively.

Keywords: Library; Reader training; Intelligence commissioner; Self-help training

Classification Number: G252

To enhance readers' information literacy capabilities, the library of Qingdao Institute of Bioenergy and Bioprocess Technology, Chinese Academy of Sciences (hereinafter referred to as "the Library") has long prioritized training in literature and information skills. Through continuous refinement based on accumulated experience, the Library now conducts over six centralized training sessions annually, with some single sessions attracting more than 240 participants. These programs have been widely welcomed by the research community. This paper uses a training event held in August 2014 as a case study to analyze the critical elements of successful reader training, offering preliminary insights to stimulate further discussion among library professionals.

1. Determining Training Content

The Library has established a comprehensive intelligence commissioner system covering all research teams at the institute. Each team leader designates one active staff member to serve as an intelligence commissioner, who acts as a crucial liaison between the Library and their respective team in all literature and information service matters. To plan training programs, the Library creates a registration summary form listing each training topic along with its objectives and main content. This form is distributed via email to all intelligence commissioners, who are responsible for publicizing the training within their teams (including students), collecting registration information, and returning the compiled data to the Library. For the August 2014 training, registration results showed 46 participants for EndNote proficiency training, 32 for TDA (Thomson Data Analyzer) proficiency training, and 21 for citation retrieval skills training. The selection of these three topics was strategically based on the "new researcher orientation" context: many new hires had never used EndNote before, and the newly released EndNote X7 offered enhanced features; TDA serves as a critical intelligence analysis tool with clear research applications; and citation retrieval represents a fundamental information competency that all researchers should possess.

2. Determining Training Personnel, Venue, and Time

Subject librarians from the National Science Library, Chinese Academy of Sciences, are highly proficient in conducting EndNote and TDA training, while our Library staff hold certification from the National Science Library for citation verification and retrieval services. Accordingly, three qualified trainers were secured for the respective sessions. Although registration numbers suggested a small meeting room accommodating 50 people would suffice—costing only 400 yuan in venue fees—the Library opted for a larger conference room based on past experience, which indicated that actual attendance often significantly exceeds initial registrations. The three training sessions were scheduled consecutively within a single morning, optimizing cost-efficiency while establishing clear start and end times, session order, and duration (including breaks and Q&A periods).

3. Training Promotion

Promotion was executed through three channels: library website announcements, mass email distribution, and poster displays. To minimize expenses, the Library designed and printed its own A3-sized posters that consolidated all essential training information in a single layout. For maximum visual impact, the text was carefully refined, with deliberate consideration given to font type, size, and color scheme. The poster was organized into several distinct sections: poster title, training time and location, training topics with their objectives and schedules, trainer introductions, and motivational messaging. The title “TDA, EndNote, and Three Other Information Skills Training” and the motivational phrase “Sharpening Your Tools Won’ t Delay Your Work” were prominently displayed for long-distance visibility. At closer range, readers could easily identify the three training topics, their specific objectives, and time slots. The promotional copy emphasized practical benefits: EndNote X7 helps researchers efficiently manage literature and streamline academic writing; TDA enables researchers to understand known competitors, identify potential competitors, and predict technological development trends through technical means, providing critical references for individual and team research decisions; and citation retrieval training aims to help researchers quickly and accurately verify paper indexing in SCI, EI, and other databases.

After finalizing the poster design, its content was adapted for library website announcements and email notifications. Promotional activities began three days in advance, with intelligence commissioners requested to forward training notices to all team members (including students) to stimulate latent demand. On the morning of the training day, reminder emails were sent to commissioners for internal circulation. Posters were displayed on all bulletin boards, with particular emphasis on placement at the cafeteria entrance, which proved crucial for maximizing visibility.

4. Training Implementation

Trainers arrived early to ventilate the venue and test projection and network equipment. At the start of each session, promotional items highlighting literature resources were distributed, including popular glasses cloths printed with the slogan “Resources to the Institute, Services to Individuals, Integration into Frontline, Embedding into Process” provided by the National Science Library. Since participants typically avoid front-row seating, training organizers actively guided attendees to sit toward the front. The first session attracted over 80 participants—nearly double the highest single-session registration count. Had the Library chosen the smaller 50-person meeting room to save costs, some attendees would have been forced to stand outside or leave entirely, as documented in similar cases [1].

Trainers employed familiar examples combined with live demonstrations, presenting content in accessible yet substantive ways that maintained audience

engagement throughout all three sessions. Organizers announced at the beginning that training materials would be promptly uploaded to the library website, encouraging participants to focus on listening and noting only critical points or questions rather than transcribing extensively. The Q&A segments saw active participation, particularly during the EndNote X7 session, where many attendees came with specific problems to solve. Since previous EndNote and TDA training sessions had been recorded and the citation retrieval methods could be adequately mastered through reference materials, no video recording was made for this event. However, organizers took photographs from multiple angles at the start of each session for archival and promotional purposes.

5. Post-Training Follow-up

Immediately following the training, the Library uploaded all three training presentations to the institutional repository under the “Reader Information Literacy Training” section. Download links were then distributed through website announcements and mass emails, with instructions for accessing previous training recordings as well. The response was substantial: EndNote materials were downloaded 182 times, TDA materials 79 times, and citation retrieval materials 45 times on the first day alone—far exceeding initial registration numbers.

The Library had also prepared EndNote and TDA software installation packages, uploading them to the repository as supplementary attachments alongside the training materials, thereby conserving institute bandwidth. To further promote TDA analytical techniques, the Library coordinated with the Resource Development Department of the National Science Library to activate a one-month institute-wide trial, enabling trained researchers to practice with the actual software, while the library’s public computers maintained a permanent licensed seat.

Notably, the Library has consistently prioritized the development of a self-service training platform. Based on user needs, the platform systematically collects and organizes training materials by theme, either produced in-house or gathered from external sources, enabling convenient self-directed learning. The institutional repository serves as this self-service training platform, systematically compiling recent years’ training materials by subject and proactively collecting relevant training resources from the web to form comprehensive thematic collections for independent download and study. The library website also features an “Information Literacy Training” section that provides hyperlinks to platforms such as the “National Science Library Information Literacy Education Platform” and the “Institute Training Materials Platform,” facilitating easy access to relevant resources based on individual needs. All publicly shared training materials on the platform are posted with the authors’ explicit permission.

Reader training involves numerous personnel, logistical, and material considerations, making efficient and rational implementation a subject worthy of continued study. It is hoped that library colleagues will jointly explore this area,

develop practical solutions, and fully leverage the supporting role of libraries in research institutions.

[1] 谷聪聪. 高校图书馆读者培训分析与思考——以复旦大学图书馆为例 [J]. 上海高校图书馆情报工作研究, 2014(2):14-16.

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