



Library website management guidelines: what you need to know

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Library website management guidelines: what you need to know

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WHY DEVELOP YOUR OWN WEBSITE MANAGEMENT GUIDELINES? How do you address issues such as the details of services offered, type of access, contact details, and what will appear on each page if you do not have documentation in the form of website management guidelines? They document the reasons behind the creation of the website and address client needs by way of a needs analysis. Design and layout are clearly explained and policies addressed in your guidelines; they are there for library staff and clients as a reference. Not only do these guidelines allow for continued maintenance of the website, but they keep you on track, give you clear direction on the type of information you are placing on your website now, as well as in the future, and will help you assign your resources.

Website management guidelines will consist of:

- executive summary;
- needs analysis;
- design and modified design;
- maintenance plan; and
- future developments.

Executive summary

The executive summary should provide an overview of the guidelines. This gives quick access to important decisions and pointers to the main body of the report. It is important to include this information here as the executive summary is often the only part of a report that management and staff read. The executive summary should only be used

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as a ready reference guide. It should be in dot point form with clear headings and with a logical progression that follows the content of the guidelines.

We used the following major headings

- technical decisions;
- access and browser;
- page layout design issues;
- graphic design decisions;
- navigational issues; and
- website components.

We believe that following this formula your executive summary will provide all the vital information necessary.

Needs analysis

The needs analysis is important because it establishes who your clients are and what your services need to be.

The needs analysis will:

- set precedents for client involvement in service and resource allocation
- show why certain decisions were made
- will show evolution of website
- give a historical record of how the information was collected to make these decisions, for example interviews, and questionnaires.

In our needs analysis we canvassed these issues:

Background

- background of the library
- how?
- when?

You should document and have a clear idea of why you have a website. What are you trying to achieve? What services are you trying to provide? What is your vision for the future?

Clients

- who are the clients?
- how many?
- where are they?
- how do you evaluate their needs?

What we discovered by doing our needs analysis was just how varied our clients were. This impacted on the design of the website because the main reason for creating it was to more effectively distribute information and give our clients better access to library services. This is relevant in today's environment, with more of us providing services to remote clients.

When we conducted the needs analysis for the ANCA website project, the slight variation in the needs of our clients had a strong influence on the shape of the site. The Belconnen Library's main clients are Canberra-based staff, with remote clients including parks management staff, research staff and the gardens staff. Other users include university students, consultants, researchers and other environmental and government organisations. The Gardens Library main clients are Gardens based staff, researchers, university students, special interest groups such as the Society for Growing Australian Plants, consultants and other environmental and government organisations such as CSIRO.

Services

- current
- future

The results of our needs analysis showed that the services of the two libraries were similar. However the clients needs were different, and consequently we provided two entry points. We felt that having a common website presence would be beneficial, and so created a common front end.

Technical aspects

- hardware
- software
- copyright

At this stage you will need to take into account such things as access points, control of graphics and the types of navigational tools to be used. Technical decisions such as page layout, graphic design and navigational issues are important to document as a record for your successor, as well as a day-to-day guide for the current webmaster. Copyright is another issue and permission should be sought for all corporate and other graphics used. The guidelines here are used to explain why technical decisions were made, for example, the client counter, date last up-dated, contact e-mail address for the web manager, specific graphics and even the size and style of the text.

Time frame

- initial implementation
- formal handover
- evaluation

We had an initial implementation period of six months. At the end of this period the completed website together with the *Website management guidelines* were handed over to the ANCA library manager. It was agreed with management that there would be ongoing evaluation. We believe that it is a good idea to evaluate the usefulness of the website within twelve months of implementation.

Website page design and modification

You should remember that the primary purpose of a special library website is to help clients find information.

The National Library of Australia has developed a set of guidelines which we believe should be used when designing websites. These guidelines are available on the internet,

via the National Library website. While using guidelines it is still important to check with your clients to ensure that what you create is what they require. JAC put together an initial sample website and presentation for our clients, the ANCA libraries.

This website was based on the needs analysis, which identified these important elements:

- differentiation between the ANCA Library and the ANBG Library;
- provision of online catalogue;
- provision of online legislation;
- gateway to other information; and
- guides on how to use the library.

This initial page met all of these objectives. This design was submitted to our clients, whose suggestions were incorporated into the modified library website. Creative design was limited to the use of the client logos and other graphics as well as the clients definite ideas on the format of the site. Feedback from this presentation also included putting in a table on statistics and separating shared information from the general information.

When we decided to review the ANCA library home page, we looked at a number of other sites to see what did and did not work. We found that simple layout, simple design and uncluttered structure and appropriate colours worked well because it made the website easy to read, navigate and understand. Most of the special library websites we have seen were only one to two pages. We think this is ideal because the pages were easy to read yet nothing important was left out. Things which we found distracting were too much text, flashing icons, inappropriate text colours and dark or patterned backgrounds. This type of structure while creative and eye catching initially, rapidly becomes irritating and distracts you from the task at hand. We discovered this from our experience with the development of our website. For example in our original website design we had a flashing heading 'Library information' as a way of attracting clients' attention. When we developed our modified website we removed the flashing element in the heading, as it had become irritating.

Maintenance plan

A maintenance plan comprises a website plan, files, template pages, continuous maintenance and future developments.

Website plan should include:

- initial design; and
- modified and most recent versions of the design.

Keep all versions of your designs to refer to because they will provide you with a record and a point of departure, and will help prevent re-invention of the wheel. As website managers come and go they can be given complete documentation of what has already been tried and worked and what failed and why. The webmaster or other library staff can see the development of the website. The maintenance plan is the living part of this document, and should be referred to regularly. The website plan can provide a sound understanding of the resources needed to maintain and continue to de-

velop the site. Resources needed for the maintenance of the website include time, money, and training.

There should be:

- time for staff to continue to design, for updating links, to consult with clients and to update knowledge;
- money for salaries, for upgrades of hardware and software, and for training;
- training of staff in the use of new hardware and software; and
- training of clients.

Files and templates

As files are stored in many different formats for the website it is essential that you keep accurate references to the different types of files. For example we used text files, word documents, HTML and GIF files. Word and text files were converted to HTML format as necessary. Templates were used as a basis for the style of web pages so that headings, file naming, background colour, logos and buttons, were standard across the site. A backup copy is a useful tool to safeguard against disaster. This should be stored in several different places and updated regularly. As many graphics used throughout a website may be subject to copyright it is recommended that all enquiries regarding the reproduction of the graphics should be directed to the public relations section or other copyright holder for the organisation.

Continuous maintenance

We recommend that a staff member be the designated web manager — or that there at least be a position which contains this responsibility in order to allow for continuity in the evolution of the website. This also provides a central point of contact for library staff and clients via the web manager's e-mail address.

We recommend that the following regime be practiced:

- daily — checking e-mail messages, adding new links, deleting links no longer established.
- weekly — *What's new* notices.
- monthly — new book list.
- quarterly — conference list, serial list.
- yearly — calendar of events, general maintenance mileposts, new developments in technology.
- as necessary — changes to policy and administration documents in line with departmental changes. Notices of the maintenance and creation of bibliographies, the purchase of new CD-ROMs and videos will prompt an update of the site.

This framework allows regular maintenance to occur and a manager could use this regime to work out allocation of resources, such as time and money. Client needs must continually be analysed and it is recommended a user evaluation be conducted within twelve months of the implementation. This evaluation should be written into your maintenance plan.

Future developments

The website manager needs to keep up-to-date with web developments. It is important to keep up with client needs and ensure that this is reflected in the website. The guidelines should include a 'wish list' to help the manager argue for continued development of the website. Without this list you risk your site becoming static. For example our wish list included desktop access to the catalogue and a *What's New* facility, both now provided, and the creation of relevant databases and access to them. We strongly recommend that the website manager remain up-to-date with changes throughout the internet, including software, hardware and other IT issues. Training courses, user groups, news groups and continual use, are important facets of maintaining awareness.

Conclusion

So: why develop your own website management guidelines? They provide answers to issues such as the details of services offered, contact details, and what will appear on each page. Policies regarding these issues, such as who has access rights; page layout and design; organisation of files and provision for maintenance are addressed in your guidelines, which serve as a reference for library staff and clients. The guidelines keep you on track, give you a clear direction for the type of information you are placing on your website now as well as in the future and they also enable you to illustrate the need for a dedicated website manager.