# Appendix F: Report on End User Impact

8/21/15 Melvyl Configuration and Electronic Resources Project Team

Comments from Reference Librarians

August 4, 2015 Prepared by Cynthia Johnson

**Definition of the users:**

* UC-affiliated faculty, undergraduates, graduates, and staff.
* Visitors to UC libraries and virtual visitors who use Melvyl for research.
* UC Reference librarians who assist patrons with research. Included in this category are the UC reference librarians working on digital reference who may be assisting patrons from other UC campuses.
	+ The Ask a Librarian statistics have a category for questions that came from our Melvyl instances (called NGM Data on the spreadsheets). The percentage of questions from Melvyl from each campus vary. In 2014/2015 only 2% of UCR’s questions came from their instance of Melvyl, while 23% of UCSF’s questions came from the UCSF Melvyl instance. In 2014/2015 we received 253 questions through the CDL Melvyl instance. In FY 2012/2013 the CDL Melvyl instance received 151 questions. The statistics are available at <http://ucdigref.pbworks.com/w/page/10529928/Statistics>. Statistics about questions initiated from within Melvyl go back to 2009/2010.

**Who responded to questions sent out to the Reference Common Knowledge Group and the Digital Reference Operations Team?**

Four people from UCSD replied, but three of them just expressed overall support for activating the Tier 2’s and Tier 3’s (for example, “I feel quite strongly that it should be an option to include local Tier 2 and 3 resources in the Central Index”). One UCSD person responded with ideas about how to improve Melvyl as a discovery layer, but nothing specific regarding adding Tier 2 and Tier 3 resources. One very balanced response came from UCM. Three positive responses from UCLA. I also talked informally to two arts and humanities librarians at UCI, who primarily had philosophical concerns rather than specific concerns. Finally, I had a conversation with Antoinette Avila, the UC Ask a Librarian Manager, who expressed support for activating the Tier 2 and 3 resources.

**Summary**

Many of the responses point out the need to create better learning objects and more effective ways to connect our patrons to assistance like the Ask a Librarian service. The issues that the scenarios describe are issues that exist currently; we need to do a better job educating our users about limitations of Melvyl, rather than trying to resolve potential issues by limiting the information available in Melvyl.

Currently Melvyl functions as a union discovery layer for the UCs because we originally chose to include only Tier 1 resources in the Central Index. When the decision to include Tier 1 databases was made there were known limitations, such as the inclusion of only a small subset of all UC-licensed databases (true for all discovery layers). Adding Tier 2 and Tier 3 databases increases the number of resources a patron is searching, which in turn increases discoverability. However, the number of databases included in each campus’ instance of Melvyl will still be a small subset of what is licensed by the individual campus. Another known limitation, which will continue if we add Tier 2 and Tier 3 databases, is the small subset of databases whose metadata will not appear in Melvyl unless a patron is either on-campus or (if off-campus) has already authenticated. (See Appendix C "WCL authentication required" worksheet.) If the recommendation to include Tier 2 and Tier 3 databases is approved, it would be beneficial to include in the implementation process an extensive outreach plan to help public services staff understand how Melvyl will change from a union discovery layer to a discovery layer that is unique to each campus.

Part 1. Overview of Responses to the Scenarios

**1. Is more (search results) better or is it more frustrating?**

Scenario: How do additional items in search results impact known-item searching? Is more search results better or just more frustrating? For example, with an increased number of databases activated, users will see more articles in search results.

From the people who responded to my email questions, and from a discussion with Antoinette Avila, the Ask a Librarian Manager, there is overall consensus that this is probably not a major issue. It has the potential to be frustrating yes, but Melvyl already often retrieves large set results. The UCM librarian noted that she hasn’t been noticing known item issues when searching in Melvyl, so she doesn’t know if activating more databases will be an issue.

From one UCLA librarian:

“I think a more important question than quantity of results is quality of results. More relevant results for a larger number of users is definitely better. Unless there is clear, quality-based criteria, I don’t think a Melvyl team should decide which results get to be in the index and which don’t – the default should just be everything that campus pays for…”

From another UCLA librarian:

“More search results in which all are relevant should be fine but more search results with irrelevant results would be frustrating.”

**2. Authentication (off campus access):**

Scenario: If a user is not authenticated, what's the impact/user experience? If the link doesn't go through UC-eLinks, where the user gets a warning to login, a user may hit a resource paywall and may not realize that the content is available, because they are not authenticated. The user may think the library doesn't license that resource.

Working with patrons via digital reference and phone reference, we already deal with this problem regularly, so this is not a new issue. The number of times patrons don’t realize that they would have access if they authenticated could grow larger. But perhaps we can work with OCLC to improve how we direct patrons to our Ask a Librarian services? The UCM librarian noted in her comments that “I think in general it is much more tempting to click on hyperlinks on the record than the UCeLinks button though the button tends to be more reliable.”

From a UCLA librarian:

“This is a user education problem about properly setting up and using off-campus access, not a Melvyl problem. The same thing could be said about the campus specific library catalogs that don’t use UC-eLinks for some records. This shouldn’t be a consideration for whether or not to include Tier 2 or Tier 3 resources…”

Antoinette and I tested what currently happens when using the UCI instance of Melvyl from off-campus, un-authenticated:

* Currently, if I am off-campus and I access the UCI instance of Melvyl, I am regularly prompted to authenticate or enter as a Guest. If I enter as a GUEST, but am viewing an article citation that comes from a UCI Tier 3 resource, I am prompted to authenticate.
* Even though I haven’t authenticated I see the UC-eLinks (but to actually perform any action I need to authenticate).

**3. No Discovery system will ever have 100%:**

Scenario: Melvyl will never have all the licensed resource that CDL and campuses license, but as we add more licensed resources from campuses, what is impact of gaps in coverage? For example, say we license 55 STEM databases, but can only activate 35 in Melvyl. How do users know about the missing databases? How do they know what's missing? and where to find it?

Most librarians agreed that this is already an issue, so it’s not a deal-breaker. As expressed by a UCLA librarian: “This 35 STEM database scenario is not specific to Melvyl and again is more of a user education problem… Again, I don’t think this is a reason not to maximize discovery (see Goal 3 of UC Strategic Plan) by filling gaps…”

One UCI librarian expressed the concern raised in the scenario: how will users know about the databases that ARE NOT in Melvyl.

**4. Activate at package level but only license some titles of the package:**

Scenario: We license a journal package selectively but we can only activate the whole package in Melvyl. Should we activate it? Should we have a policy that n% must be licensed before activating in Central Index? Users will discover articles that we don't license so what's the impact to the user? frustration? increase in use of Request?

Mixed responses on this question. UCM librarian’s response was “no,” don’t activate a package if we can’t activate the whole package. Her reasoning:

One of my greatest frustrations in Melvyl relates to false/incomplete information.  This happens with HathiTrust items that are snippets and also with journal articles where we have some years of coverage but not all and WCL doesn’t know for sure since we aren’t using the KnowledgeBase (at least that is my understanding) though the FAQ states it is because holdings are set at the journal level.  I really dislike offering a citation to someone and implying that we have it e.g. with our campus label.

Antoinette and I have a different response (if we are understanding the question): discoverability is more important than access. With a citation, the patron can request ILL. Without the citation, the patron doesn’t know that the item exists. The patrons will see the citations, correct? They just may not have access to full-text (which happens now, since many databases are not full-text databases). Yes, this will probably lead to an increase in Request. As expressed by a UCLA librarian: “I would rather the user have the power to see all the literature that is out there and then work to refine or limit their searches however they see fit. An increase in Request is ok - campus interlibrary loan reports should feedback into collection development decisions.”

**Questions raised by two UCI librarians**

* There have been a couple of philosophical questions asked, which this group can’t answer, but which I expect many people will ask, if this idea is implemented:
	+ Is Melvyl going to be our discovery layer?
* Related questions (and similar to the questions asked in some of the scenarios posed by the group):
	+ Overall concern expressed that students will never learn about/move to the specialized databases if they “think” everything is in Melvyl.
	+ Related: Does this disadvantage certain disciplines where the many of the resources will not be added to Melvyl’s Central Index?

UC-eLinks questions:

* I am unclear if UC-eLinks will appear for users for the Tier 2 and Tier 3 resources. Is there a reason that UC-eLinks *won’t* appear in the Tier 2 and/or Tier 3 resources?
* And does this work (having UC-eLinks appear in information coming from Tier 2 and Tier 3 resources) require additional work at CDL and/or local campuses?
* Answer from CDL's technical lead for UC-eLinks, Margery Tibbetts: UC has configured UC-eLinks to appear on all electronic items in WorldCat. This includes all of the Central Index content, ejournal and ebooks. For users not on their campus network they will need to log on to the network before they can access the full text and the UC-eLinks menu window will include the Proxy/VPN reminder message. This behavior will not change for Tier 2 and 3 databases. There is no additional work in UC-eLinks.

If the recommendation to include Tier 2 and Tier 3 databases is approved, it would be beneficial to include in the implementation process an extensive outreach plan to help public services staff understand how Melvyl will change from a union discovery layer to a discovery layer that is unique to each campus.

Part 2. Emailed Responses by Campus

UCM

**1. Is more (search results) better or is it more frustrating?**

I think it has the potential to be more frustrating.  I actually haven’t been noticing known item issues when searching in Melvyl so I don’t know if activating more databases will make this an issue.

**2. Authentication (off campus access):**

I should try this from an off-campus location.  I have more comments related to this in the last item you list.  I think in general it is much more tempting to click on hyperlinks on the record than the UCeLinks button though the button tends to be more reliable.  Again, I don’t think this issues will be “fixed” with more databases but I suppose it could be exacerbated.

**3. No Discovery system will ever have 100%:**

I think this is already currently an issue so not a deal breaker for me.  Maybe more is better than none?

**4. Activate at package level but only license some titles of the package:**

My first response to your question is no.  One of my greatest frustrations in Melvyl relates to false/incomplete information.  This happens with HathiTrust items that are snippets and also with journal articles where we have some years of coverage but not all and WCL doesn’t know for sure since we aren’t using the KnowledgeBase (at least that Is my understanding) though the FAQ states it is because holdings are set at the journal level.  I really dislike offering a citation to someone and implying that we have it e.g. With our campus label.

UCSD #1

“I like the idea also.  Prefer having the more (all tiers) to less option.”

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UCSD #2

“I am hoping that there will be a message to users if their campus does not subscribe to the resource and they try to access it, rather than think it is an authentication issue, even just a general "your campus may not subscribe, check 'Ask a Librarian' for help type note?

Plus if users want access to a resource, it would be good for their campus librarians to know, and maybe they can request to add resource to that campus' collection (promoting a tier 2-3 to a tier 1?) next time the subscription is reviewed.”

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UCSD #3

“I feel quite strongly that it should be an option to include local Tier 2 and 3 resources in the Central Index.”

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UCLA #1

**1. Is more (search results) better or is it more frustrating?**

For known-item searching, the fewer results the better.  As a student, I think it really depends.  More search results in which all are relevant should be fine but more search results with irrelevant results would be frustrating.

**2. Authentication (off campus access):**

In general, no authentication for off-campus users does not make a positive user experience.  Perhaps some language/message that alerts and provides information on eligibility of off-campus access can be a potential solution.

**3. No Discovery system will ever have 100%:**

Again, some language that explains that coverage is limited to x number of resources could help.

**4. Activate at package level but only license some titles of the package:**

If students discover articles we don’t license then they could learn about ILL services and obtain it that way.

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 UCLA #2

**1. Is more (search results) better or is it more frustrating?**

As a graduate student, I would have been horrified if I thought that some machine or other outside process were truncating my search results. If I search "xyz," then I expect to see all the hits within the database. Please let me choose which one of them I'd like to actually check out.

**2. Authentication (off campus access):**This is not a new problem. Lots of patrons come to the Research Assistance Desk to ask about this. Maybe we need to do more outreach to educate our patrons about the proper course of action when they are denied access. (Come talk with the library staff for more details . . . ) **3. No Discovery system will ever have 100%:**If Melvyl will only include articles on a "spotty" basis, we need to publicize this. Every serious library patron needs to know that Melvyl's access to articles is incomplete. Maybe this needs to be one of the announcements on the rotating home page for a year. **4. Activate at package level but only license some titles of the package:**Again, we need to educate users to look in Voyager and our databases before they punch the computer or jump off a bridge. The solution to this kind of problem is not obvious. Help our patrons out by giving them instructions for alternative search strategies. It would be nice if "Need help finding this article?" popped up on their computer screen.

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UCLA #3

Generally, I think we should be adding Tier 2 and Tier 3 resources to the appropriate campus instances of Melvyl as it supports the UC Strategic Plans goals about enhancing discovery <http://libraries.universityofcalifornia.edu/groups/files/coul/docs/SPP_20140923_final.pdf>. A discovery system should attempt to make all resources licensed by the library available and probably even resources the library doesn’t have available if it is supposed to be a one stop shop that can compete with google. Interlibrary loan should be the bridge to access to items the library doesn’t have. The differences between Tier 1, 2, and 3 don’t really matter to the end-user – those are internal functions of collection development. Some Tier 2 and Tier 3 resources may be more relevant to some users than some Tier 1 resources.

**1. Is more (search results) better or is it more frustrating?**

I think a more important question than quantity of results is quality of results. More *relevant* results for a larger number of users is definitely better. Unless there is clear, quality-based criteria, I don’t think a Melvyl team should decide which results get to be in the index and which don’t – the default should just be everything that campus pays for. Currently, the criteria for inclusion is technological and Tier 1 based, not quality or content based. If we can standardize the metadata from the various sources a little to add a few more limiters/filters than google scholar that would make it easier for users to sift through more results.

**2. Authentication (off campus access):**

This is a user education problem about properly setting up and using off-campus access, not a Melvyl problem. The same thing could be said about the campus specific library catalogs that don’t use UC-eLinks for some records. This shouldn’t be a consideration for whether or not to include Tier 2 or Tier 3 resources.

**3. No Discovery system will ever have 100%:**

It’s ok that Melvyl will never have all resources, but as we add resources, gaps are reduced and that is progress. I’m guessing the likely impact of gaps in coverage is more for undergraduate students - some might treat Melvyl as the best one stop shop, even though it will be better for some disciplines than others. This 35 STEM database scenario is not specific to Melvyl and again is more of a user education problem. The same thing about missing content could be said about any other discovery system. Google Scholar – what isn’t included (SciFinder, aggregator databases…)? Library catalog – what level (database, serial title, book, book series, analytics, proceedings at book level, individual papers or reports, standards collections or individual industry standards, archival collections, specific papers or works in those collections?) is being cataloged and what is missing? Web of Science – why aren’t all journals in here, why can’t I find an impact factor for x journal? Again, I don’t think this is a reason not to maximize discovery (see Goal 3 of UC Strategic Plan) by filling gaps. Why would we stay stagnant while Google keeps building its index <http://newsbreaks.infotoday.com/NewsBreaks/ProQuest-to-Open-Content-Through-Google-Scholar-103106.asp> ?

**4. Activate at package level but only license some titles of the package:**

Again, not unique to Melvyl - we already add package level records in ERMs, library catalogs, and Melvyl (ex. sciencedirect) where we only get select titles. A policy for adding packages where over 50% is licensed might be good. Our A&I databases and google link to articles of journals we don’t license. The unique thing about WorldCat Local is that it is trying to merge the traditional library catalog with abstracting and indexing functionality that has been taken over by google. I would rather the user have the power to see all the literature that is out there and then work to refine or limit their searches however they see fit. An increase in Request is ok - campus interlibrary loan reports should feedback into collection development decisions.

Part 3: Comments from ILL Staff

August 6, 2015. Prepared by Patrick Shannon

UCB

Patrick's comments:

ILL staff at Berkeley would come down in favor of displaying more results, as long as our ability (or the patron's ability) to refine searches is maintained or enhanced.  There would likely be increased work for staff who would have to troll through more results, but that is seen as a worthwhile trade-off.

As for the difficulties around patron authentication, ILL staff would be less affected than Reference staff, who would probably bear the brunt of patron frustration at not being able to access databases from home that they know they are able to access on campus.  We feel that education is key in this issue: the patron should, where possible, see a note of some kind that explains the authentication issue.  We have no idea as to where that might appear.

Regarding the last two scenarios, Berkeley can really add nothing to UCLA's comments.  The selective activation of titles is fraught with problems.  If we license them, I am inclined to say we should activate, though there will certainly be frustration when patrons try to access non-licensed material.  Can a flag be inserted in the record that will tell searchers that the title isn't licensed?  Though that will then be inclined to ask, "well then why does it show up in my search?"

One issue of concern is how Melvyl Request might be affected by non-licensed titles in packages that are activated. Will Request be able to tell that UCLA (for instance) does not have a title that a Berkeley patron is requesting?  The possible implications on work load and turnaround time could be very significant.  [CDL: This should not be an issue. In WCL it is very clear when one campus doesn’t license a title and another campus does.]

UCLA

**1. Is more (search results) better or is it more frustrating?**

As long as the relevancy is in place more is not necessarily a problem.

[CDL: Relevancy will not change with additional databases.]

**2. Authentication (off campus access):**

It would be helpful to have a note stating that logging in might give access to the full text.

[CDL: We can modify the "guest login message" in Melvyl, but this may be more of a user education / off campus login information issue.]

**3. No Discovery system will ever have 100%:**

How about a link to the local catalog to see if there is access to full text from the home catalog?

[CDL: The local catalogs are available from the library drop down (upper left corner in Melvyl)]

**4. Activate at package level but only license some titles of the package:**

This is a difficult one.  If the online link is clicked and you’re taken to an interim page that state a particular title is not owned, I guess it’s doable.  There will be frustrations and increase in ILL.

[CDL: The article record will be included in the search results but will not indicate the campus owns the item unless holdings have been set on the journal record. This is what happens for print items now. A search in WCL returns everything that matches whether or not UC owns the item. The relevancy pops the UC items to the top of the list but the non-UC items are still in the list.]