UC-eLinks November 2007 Assessment Report

UC-eLinks Redesign Project

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EXECUTIVE SUMMARY

The main purpose of the study was to determine the value of various existing and potential service options for the UC-eLinks service menu. We also examined the name UC-eLinks and direct linking scenarios. ("Direct linking" is the Ex-Libris term for bypassing the SFX service menu window and going directly to full text.) One-on-one interviews were conducted at UC Santa Cruz on November 14, 2007 and at UCLA on November 29–30, 2007. Six upper division undergraduate students were interviewed at UCSC. Ten graduate students were interviewed at UCLA, but one interviewee's results had to be discarded because of quality issues. Each interview lasted between 35–55 minutes.

The results of this round of assessment support exploring the potential for changing the service menu window to feature direct linking in a frame. The assessment also found that students were generally satisfied with the name "UC-eLinks".

Regarding the key questions that this assessment was designed to address, the team uncovered valuable information that should inform future decisions about the design of the service menu.

1. *What services should be provided to users who are trying to get to the full text of an item via UC-eLinks?*

   It is important to remember the context in which users encounter the UC-eLinks service menu window. The service menu is not considered a general research tool by users; it is something that occurs at a specific point in their research workflow to help them get the full text of an item. Although users expressed interest in supporting services, e.g., downloading citations, their primary goal is obtaining full text, and they define success as getting full text.

2. *How should these services be presented to users?*

   Whatever its form, the service menu should be designed to guide users through the process of locating full text. There should be a clear flow to the interaction. The visual design and structure of the interface itself should guide users to their next step should the previous step fail to deliver the desired item.

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1 PURPOSE OF THE STUDY

The purpose of this round of assessment was to determine the types of services users expect and value when trying to retrieve the full text of an item using the UC-eLinks service menu.

UC-eLinks is the UC-customized version of SFX, a product of Ex Libris (http://www.sfxit.com/), which uses OpenURL linking technology. UC-eLinks is currently available through most of the journal article citation databases to which the CDL subscribes on behalf of the UC community of students, faculty, and staff. The technology supporting UC-eLinks is able to recognize that a user is on a UC campus or is using a UC campus proxy server or VPN. Although anyone may view a UC-eLinks window, its contents are tailored to the user's location, and the level of access to full text and other licensed services is controlled by each vendor depending on the user's location.

This assessment was designed to gather information for the following key questions:

1. What services should be provided to users who are trying to get to the full text of an item via UC-eLinks?
2. How should these services be presented to users?

2 PARTICIPANTS

An opportunistic sample was chosen for this assessment, which means that participants were secured just prior to the time of testing. Posters announcing the upcoming assessment were put up in the library a few days before each round of testing. Interested students were directed to stop by the testing location on the days of testing. After answering a couple of brief screening questions, suitable candidates – upper division undergraduate or graduate students with experience using UC-eLinks – were asked to participate. If a student stopped by during an interview in progress, the note-taker stepped outside the interview room and encouraged the student to return at a later time.

There were 16 interviews, but only 15 were used in analysis. The participant whose data was not counted was a graduate student who initially indicated familiarity with UC-eLinks, but subsequently admitted that she had never seen or used the service. The facilitator was unable to conduct the interview as required, so this participant's data was discarded. In total, we collected data from nine graduate students and six upper division undergraduate students.

3 METHOD

Each participant was greeted by the interviewer and made to feel as comfortable as possible. The facilitator (Jane Lee, CDL) introduced herself and the note-taker (Rachael Hu, CDL, for UCLA and Felicia Poe, CDL, for UCSC) and explained the purpose of the interview. Participants were assured that there were no right or wrong answers to any question and that their opinions were highly valued. At the end of the introduction, the interviewer told the participants about their right to stop the interview at any time and asked them to sign consent forms. Participants were then given a $25 gift card for the campus bookstore.

For some questions, participants were shown printed screenshots of various mock ups for the service menu window and asked for their preferences and thoughts given different scenarios. Other questions required participants to assign chips to service options based on their value to them. For a complete list of tasks, please see Appendix A: Objectives and Questions. During the interviews, comments, preferences for options, and the number of chips placed on items were recorded by the note-taker.

4 FINDINGS AND RECOMMENDATIONS

4.1 UC-eLINKS: THE BRAND

4.1.1 "UC-eLINKS" WORKS (QUESTION 3)

- "The name makes sense after awhile. After the first few times I don't pay attention to the name. It's not a bad name; it's easy to say. It's just jargon."

- "Don't change the title. It is recognizable."

Observation	Eleven of fifteen participants stated satisfaction with the name "UC-eLinks". They made statements that indicated a strong reaction to and affinity for the visual design of the UC-eLinks button. They appreciated that the button stands out and is easily recognizable. Through experience, they have associated "that yellow button" with being on the right track towards accomplishing their goals.
Interpretation	The name wasn't as important as the visual design, but the name "UC-eLinks" was satisfactory to the majority of participants.
Recommendation	Do not change the UC-eLinks name and button design.

4.1.2 UC-eLINKS: IT'S UC! (QUESTION 3)

- "I like it when it has 'UC' in the name. It's easier for me to keep in mind that it's university-related."

Observation	Participants emphasized the importance of having "UC" in the name. Among the potential naming options, seven saw "Find It @UC" as a possibility.
Interpretation	The UC brand is important to students.
Recommendation	Do not change the UC-eLinks name and button design.

4.1.3 IF YOU SAY "FULL TEXT", YOU MUST DELIVER FULL TEXT. (QUESTION 3)

- "I think 'UC Full Text' would leave out the other options."

- "Maybe we should hold off [using "full text" in the name] until we really have it all full text!"

Observation	Given the choice of four alternate names (Find It, Get It, Find It @UC, and UC Full Text), none of the participants voted for "UC Full Text". Several participants stated that it would be misleading to use "full text" in the name, if the service could not guarantee full text with 100% certainty.
Interpretation	If students see the phrase "full text", they expect full text.
Recommendation	Since the current system cannot guarantee full text 100% of the time, the name should not include the phrase "full text".

4.1.4 THE BUTTON IS KEY. (QUESTION 8)

- "It's the 'orange button'. The name means nothing to me."

- "It's not so much the name as the color and the box that stands out. It immediately jumps out.... It's really easy to see."

- "Because of my cognitive impairments, a graphic works better for me. The orange button is more dramatic."

Observation	Given the choice of a hyperlinked graphical button, a hyperlinked text label, and a hyperlinked title, 100% of participants chose the hyperlinked graphical button.
Interpretation	Participants want the link to the service menu to stand out.
Recommendation	Do not change the design of the UC-eLinks button, and continue to use the current UC-eLinks button to link to the service menu.

4.2   CURRENT ATTITUDES TOWARD UC-eLINKS

- "When I see the menu indicates full-text is available, joy comes into my heart!"

- "I really like the UC-eLinks button. It stands out as the next place I need to go to. That's really my next step."

- "[That] cheery little orange button that tells me this [my search] is coming to an end!"

- "Always seems like there's a lot of steps!"

- "Every once in a while I get stuck in a loop."

- "For the first few years I was here, this [service menu window] was not a good place for me to go because I didn't understand what I was supposed to do here."

- "I've never seen the bottom half of the [service menu window] page! Part of the problem for me [in using the help options] would be that I would feel I was shooting something off into the air."

- "When I first see this [service menu window] I think I won't be able to find anything [due to bad past experiences]."

- "I've had it be successful and also not…. If I encounter problems, I usually give up!"

Relative Value of Current Service Options

Service Option	Overall	UCLA/Graduate	UCSC/Undergraduate
Get full text online	40.0%	39.6%	40.7%
Find a copy in campus library catalog	16.8%	15.3%	19.0%
Find a copy in Melvyl	12.7%	11.6%	14.3%
Request a copy from another library	13.5%	14.7%	11.7%
Add citation to a bibliography	12.1%	12.7%	11.3%
Ask a librarian	5.1%	6.4%	3.0%

Percentage of Chips Assigned
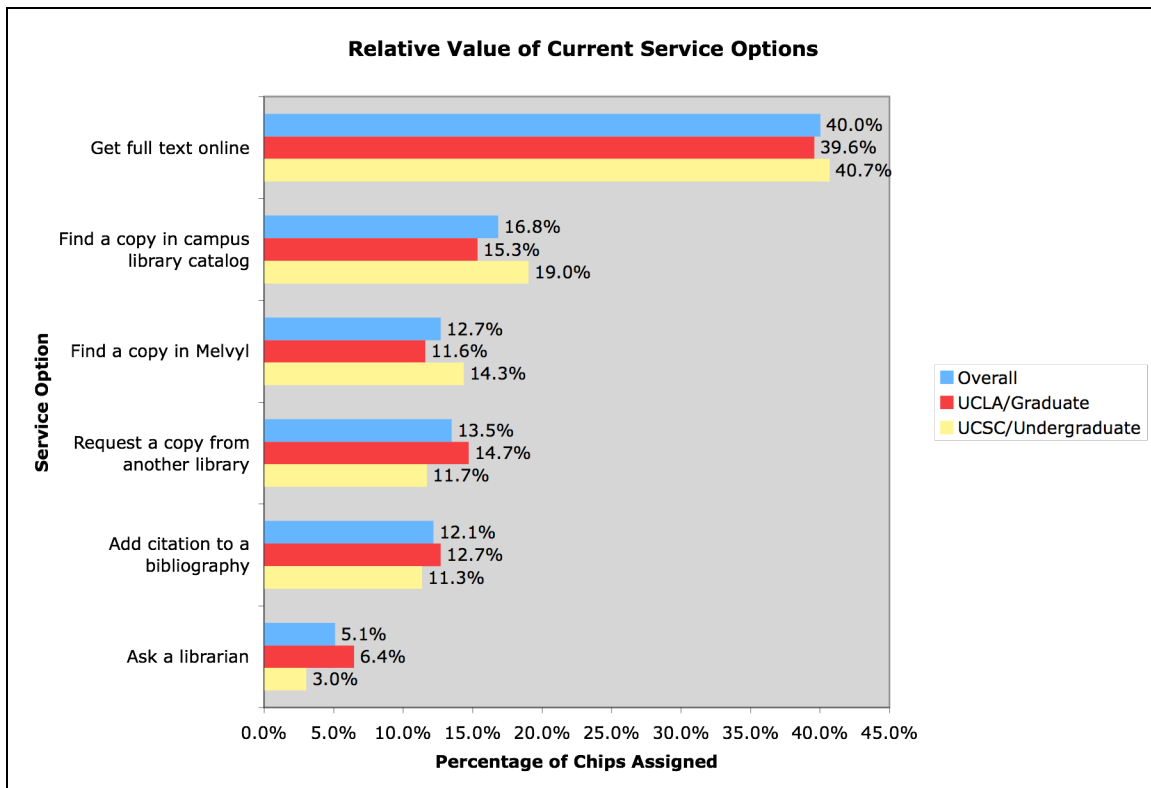
4.2.1 CURRENT EXPERIENCES (QUESTION 1)

Observation	Participants expressed great appreciation for the power of UC-eLinks. However, they also reported often feeling frustrated when the service failed to deliver what they were seeking.
Interpretation	Students appreciate the service that UC-eLinks provides – when they are successful. They desire more guidance for the instances when they are not.
Recommendation	Improve the design of UC-eLinks so that there is a clear flow to the interaction. The visual design and structure of the interface itself should guide users to the next step should the previous step fail to deliver the desired item.

4.2.2 CHALLENGES (QUESTION 1)

Observation	Participants reported encountering an initial, steep learning curve and ongoing difficulties when full text is not immediately available through UC-eLinks.
Interpretation	The service that UC-eLinks provides is not intuitively understood. Students must learn how to use it. In addition, students want stronger guidance on what to do when the service can't deliver full text immediately.
Recommendation	Develop new ways to inform and instruct students about UC-eLinks. Improve the interface to better guide students when full text is not immediately available.

4.2.3 MOST VALUABLE SERVICE: FULL TEXT AVAILABLE ONLINE (QUESTIONS 2, 7)

Observation	When asked to assign chips to current services based on how valuable they are to them, participants placed an average of 40% of their chips on "get full text online".
Interpretation	Students' best-case scenario is getting immediate access to full text online.
Recommendation	Continue to focus on online full text as the ultimate goal.

4.3 INTEREST IN CURRENT AND POTENTIAL SERVICE OPTIONS

Relative Value of Current and Potential Service Options

Service Option	Overall
Get full text online	26.5%
Find a copy in campus library catalog	11.2%
Find a copy in Melvyl	6.8%
Request a copy from another library	9.2%
Add citation to a bibliography	3.2%
Ask a librarian	3.3%
Add item to course management system, e.g., Blackboard	1.1%
Add item to social bookmarking service	0.3%
Post item to blog	0.0%
See more information about this item (abstract, works that cite this item, etc.)	10.9%
See similar items (on JSTOR, Google, Yahoo, Amazon, etc.)	5.1%
See related items (by this author, on this topic, etc.)	12.8%
Download/email citation	9.3%

Legend: ■ Overall ■ UCLA/Graduate ■ UCSC/Undergraduate

X-axis: Percentage of Chips Assigned (0.0% – 30.0%)
Y-axis: Service Option

4.3.1 ONLINE FULL TEXT IS THE PRIZE (QUESTIONS 2, 7)

Observation	When asked to choose their own services for UC-eLinks and assign chips based on how valuable they are to them, participants placed an average of 26.5% of their chips on "get full text online", a far greater percentage than for any other service.
Interpretation	Students' best-case scenario is getting immediate access to full text online.
Recommendation	Continue to focus on online full text as the ultimate goal.

4.3.2 NO NEED FOR BLOGS (QUESTIONS 2, 7)

Observation	"Post item to blog" received no chips, and many participants commented that they didn't blog.
Interpretation	Services dealing with blogs are unnecessary.
Recommendation	Leave this service off the UC-eLinks service menu.

4.3.3 LITTLE INTEREST IN SOCIAL BOOKMARKING AND COURSE MANAGEMENT SYSTEMS (QUESTIONS 2, 7)

Observation	"Add item to course management system" and "add item to social bookmarking service" received very few chips. Most reported that they didn't use CMSs, and many had never heard of social bookmarking.
Interpretation	Students are not interested seeing these services on the UC-eLinks menu.
Recommendation	Leave these services off the UC-eLinks service menu.

4.3.4 SEE MORE INFORMATION/SEE RELATED ITEMS

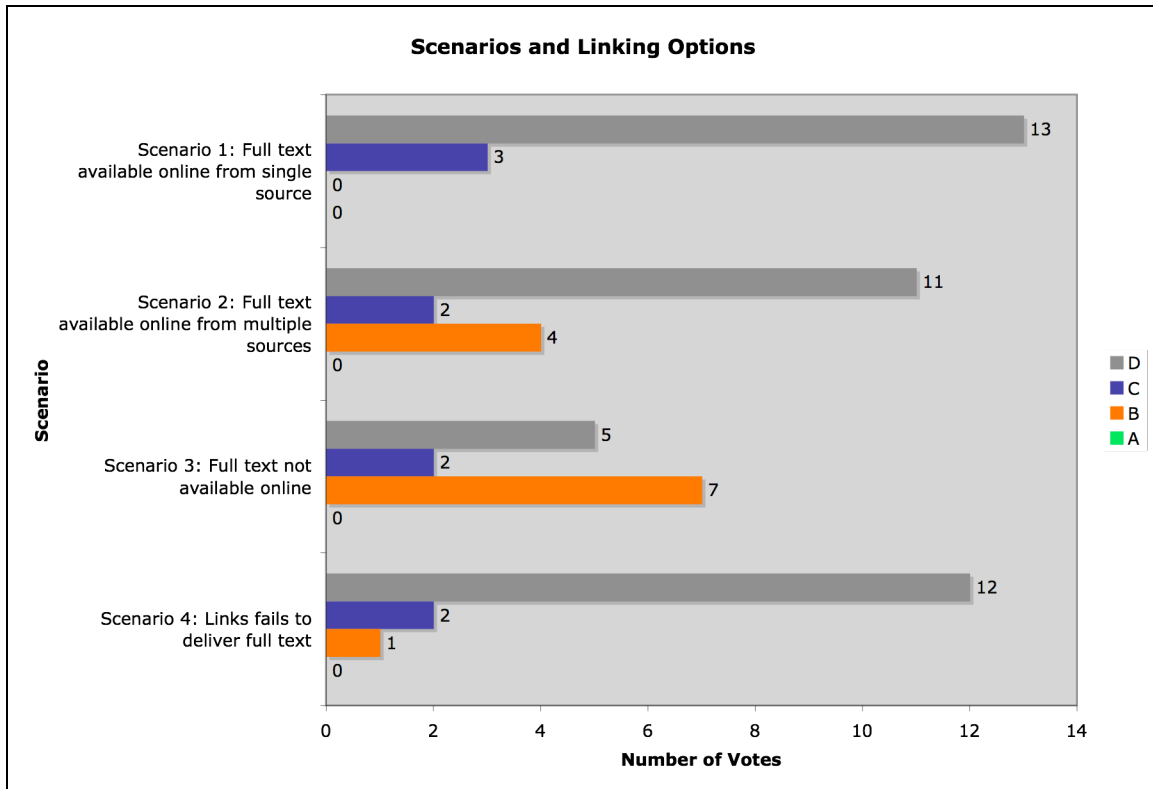|	
Observation	"See more information about this item" and "see related items" received 10.9% and 12.8% of chips, respectively.
Interpretation	Students expressed interest in seeing more information about an item – in particular, works that cite the item – and related items, such as other works by the same author. However, it is unclear whether students were expressing a desire for these services in general or a specific desire to have these services available on the UC-eLinks service menu window itself.
Recommendation	Examine these services and questions in a future assessment.

4.4 LINKING OPTION PREFERENCES

Legend: (See §6.3 Appendix C.)

D: Direct linking in a frame
C: UC-eLinks service menu window and window with full text article open simultaneously.
B: UC-eLinks service menu window opens. (status quo)
A: Bypass service menu and open full text in a new window.

Scenarios and Linking Options

Scenario	D	C	B	A
Scenario 1: Full text available online from single source	13	3	0	0
Scenario 2: Full text available online from multiple sources	11	2	4	0
Scenario 3: Full text not available online	5	2	7	0
Scenario 4: Links fails to deliver full text	12	2	1	0

Number of Votes

4.4.1 PARTICIPANTS WANT FULL TEXT, BUT THEY ALSO WANT SERVICE OPTIONS. (QUESTIONS 4–6)

- "This one [option D] gets you to your paper and you can look through it and see if you even like it or not – see if it has anything to do with your paper - and you can just go back quickly. But if you're wondering about these things [service menu window] they're handy, you don't have to go searching around for them. Seems like a great idea."

- "Best of both worlds [option D]. You're giving me the article and it's nice to have this other stuff…. Please don't obscure my vision; please don't diminish the frame size of the article I want to look at. I want the article – that's what I came for."

- For Scenario 2, populate the body of the frame of D with the article, but also show the other choices in the top frame. "I can volley back and forth…. [I'm] only one click away… not a big inconvenience."

Observation	For scenarios 1, 2, and 4, option D (direct linking in a frame) received far more votes than the other options. Students emphasized the importance of having service options visible to help orient them and to allow them to pursue other options.
Interpretation	Students want to be grounded and retain control during their research workflow.
Recommendation	Explore the potential for changing the service menu window to feature direct linking in a frame.

4.4.2 MORE GUIDANCE, PLEASE (QUESTIONS 4–6)

- "It would be nice if it clearly said, 'this is all we have'. I tend to go back and get stuck in a loop. I want to know I should just let this [hope for finding full text] go!"

Observation	Students reported being uncertain what to do when UC-eLinks did not return full text.
Interpretation	Students often are unsure of what they are looking at and what their options are when working with UC-eLinks.
Recommendation	Improve the interface so that the results of users' actions and next steps are clear.

4.4.3 STUDENTS RECOGNIZE AND DEVELOP PREFERENCES FOR VENDORS. (QUESTIONS 4–6)

- "Different online sources? I want to know which online source is available because all of them are different. A lot of the online journal servers are so easy to use and some are very complicated."

Observation	In scenario 2 (full text available from multiple sources), students reported wanting the ability to choose which vendor to get the full text from, citing differences in presentation, available additional information, ease of use, and previous experiences of success.
Interpretation	Students want control over where their information comes from.
Recommendation	When full text is available from multiple sources, give students the power to choose their preferred source.

4.5 THE CASE FOR THE STATUS QUO (QUESTIONS 4–6)

- One participant's reason for choosing option C: "I'm looking at something I know [the current UC-eLinks window] plus I directly see the abstract or full-text."

- "I'm used to the service menu as is. I would like it not to change as much."

- "I would be pissed if UC-eLinks went away. I would be less angry about two windows if I felt in control."

Observation	The participants who did not chose option D as their first choice stated that they preferred to work with the current version of UC-eLinks because of its familiarity.
Interpretation	These students have already invested time and energy to learn to use the current UC-eLinks menu and are wary of having to learn a new interface and system.
Recommendation	If technically possible, give users the option to switch from the new UC-eLinks service menu window to the previous (current) interface during a transition period. Also, do not implement any major changes during the academic year.

5 DISCUSSION

Regarding the key questions that this assessment was designed to address, the team uncovered valuable information that should inform future decisions about the design of the service menu.

1. *What services should be provided to users who are trying to get to the full text of an item via UC-eLinks?*

   It is important to remember the context in which users encounter the UC-eLinks service menu window. The service menu is not considered a general research tool by users; it is something that occurs at a specific point in their research workflow to help them get the full text of an item. Although users expressed interest in supporting services, e.g., downloading citations, their primary goal is obtaining full text, and they define success as getting full text.

2. *How should these services be presented to users?*

   Whatever its form, the service menu should be designed to guide users through the process of locating full text. There should be a clear flow to the interaction. The visual design and structure of the interface itself should guide users to their next step should the previous step fail to deliver the desired item.

6   APPENDICES

6.1   APPENDIX A: OBJECTIVES AND QUESTIONS

1. Determine user's attitude toward current UC-eLinks window and the various options presented for getting to a desired item. Capture user's initial opinions about services.

Present user with screenshot of current UC-eLinks window on paper. Ask for responses to what's there. Clicked every link before? Which ones most often used? Previous experiences.

2. Determine value of current service options.

Present user with chips and cards with current service menu options. Ask user to assign the number of chips that reflects how important each of the options is to the user.

3. Determine the attitudes about the current name ("UC-eLinks") and determine which alternatives may be more meaningful/useful.

Part One: Present user with index card with a large UC-eLinks button. Also present screenshot of results page that has multiple UC-eLinks buttons. Ask user to describe what he/she thinks this button represents and what it will do. What comes to mind when user sees this?

Part Two: Present user with the following alternate names:

- *"Find It",*
- *"Get It",*
- *"Find It @UC", and*
- *"UC Full Text".*

Ask for feedback, ratings, preferences, etc.

4. Determine whether users prefer to bypass the service menu entirely and go directly to the full text for each of the following scenarios:

Scenario 1: Full text available from a single provider
Scenario 2: Full text available from multiple providers

    Option A: link → full text
    Option B: link → service menu
    Option C: link → full text + separate service menu
    Option D: link → full text in frame with additional services

Present user with screenshots of the different options. Ask user to discuss pros and cons of each option. Ask user to indicate preference for Scenario 1. Then, ask if anything changes if full text is available from multiple providers (Scenario 2).

5. Determine user's preferred action if there is no link to full text. Determine whether user wants to see all options at once or in stages.

Scenario 3: No full text available online

Keep diagrams for Options A–D handy. Present user with the scenario that there is no option for getting full text online. Ask user what he/she will do next. Start with the option that he/she preferred in question 4. Discuss. Ask if they can imagine a different option or solution.

6. Determine user's preferred action (and UI tools?) if the promised full-text is not actually in place where it "should" be.

Scenario 4: Full text link fails to deliver full text

Keep diagrams for Options A–D handy. Use a prototype and present user with a screen that fails to deliver the full text. [Use journal homepage example.] Ask user what he/she will do next. Start with the option that he/she preferred in question 4. Discuss. Ask if they can imagine a different option or solution.

7. Determine the value of the following current and possible service options:

    a. Get full text online
    b. Find a copy in the UCLA Library Catalog
    c. Find a copy in Melvyl (UC Libraries Catalog)
    d. Request a copy from another library
    e. Add citation to a bibliography
    f. Ask a librarian
    g. Add item to course management system, e.g., Blackboard
    h. Add item to social bookmarking service
    i. Post item to blog
    j. See more information about this item (abstract, works that cite this item, etc.)
    k. See similar items (on JSTOR, Google, Yahoo, Amazon, etc.)
    l. See related items (by this author, on this topic, etc.)
    m. Download/email citation

Ask user to "build" their personal service menu by choosing services from a stack of cards that we provide. Present user with index cards with options written on them (one per card). (Add any services user mentioned in previous tasks. Provide a blank card for any other ideas.) Ask user to choose the services they'd want to see in a service window. Set aside any unwanted cards.

Once user decides what features the window has, ask user to assign the number of chips that reflects how important each of the options is to him/her. New rule: each card must have at least one chip on it.

8. Determine user's expectation and preference for what the link to the service menu user created in question 7 should look like.

Option 1: hyperlinked title of article
Option 2: hyperlinked button
Option 3: hyperlinked text label

Present user with diagrams of the different options. Discuss. Ask for preference.

6.2 APPENDIX B: CHART DATA TABLES

Question 2	Overall %	UCLA %	UCSC %
Get full text online	40.0%	39.6%	40.7%
Find a copy in campus library catalog	16.8%	15.3%	19.0%
Find a copy in Melvyl	12.7%	11.6%	14.3%
Request a copy from another library	13.5%	14.7%	11.7%
Add citation to a bibliography	12.1%	12.7%	11.3%
Ask a librarian	5.1%	6.4%	3.0%

| Question 7	Overall %	UCLA %	UCSC %
Get full text online	26.5%	25.6%	28.0%
Find a copy in campus library catalog	11.2%	11.1%	11.3%
Find a copy in Melvyl	6.8%	6.4%	7.3%
Request a copy from another library	9.2%	9.3%	9.0%
Add citation to a bibliography	3.2%	3.8%	2.3%
Ask a librarian	3.3%	4.0%	2.3%
Add item to course management system, e.g., Blackboard	1.1%	0.9%	1.3%
Add item to social bookmarking service	0.3%	0.4%	0.0%
Post item to blog	0.0%	0.0%	0.0%
See more information about this item (abstract, works that cite this item, etc.)	10.9%	14.0%	6.3%
See similar items (on JSTOR, Google, Yahoo, Amazon, etc.)	5.1%	1.8%	10.0%
See related items (by this author, on this topic, etc.)	12.8%	13.3%	12.0%
Download/email citation	9.3%	9.3%	9.3%

6.3 APPENDIX C: LINKING OPTIONS
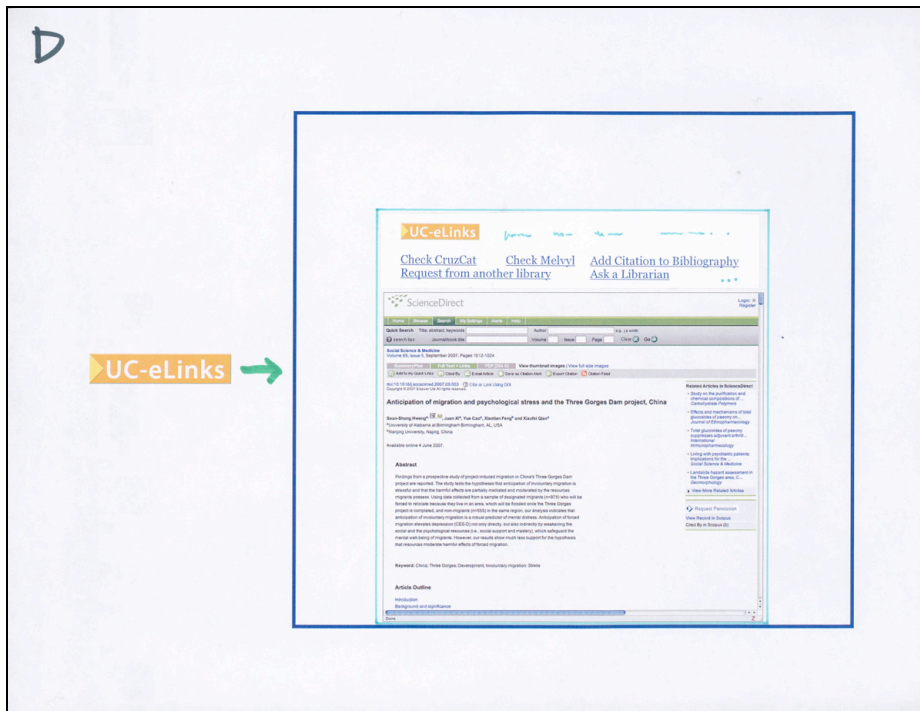
Option A: Direct link to full text
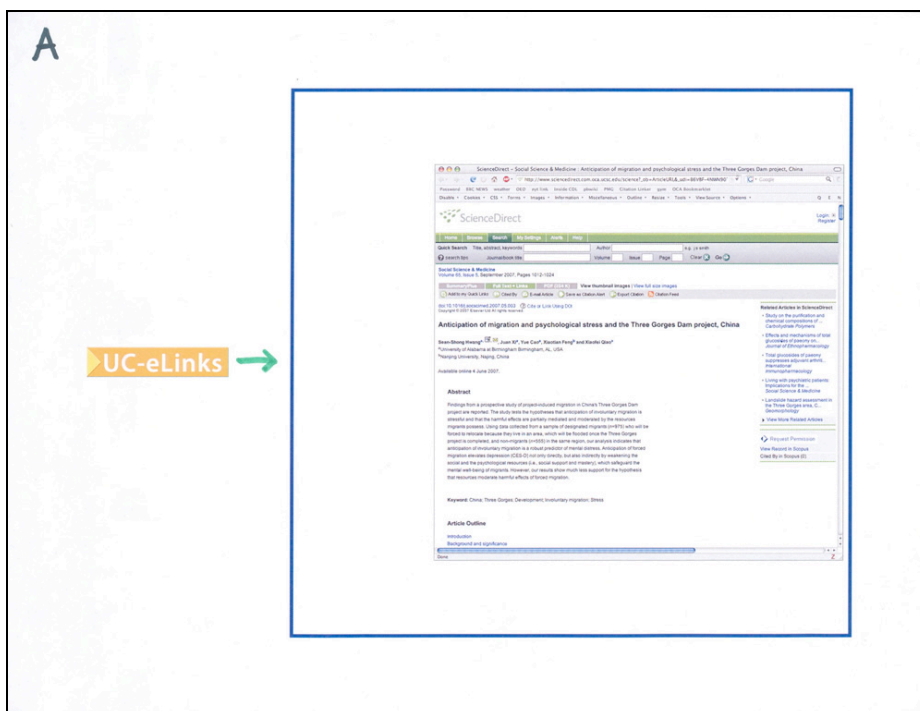
Option B: Status quo: Link to service menu window
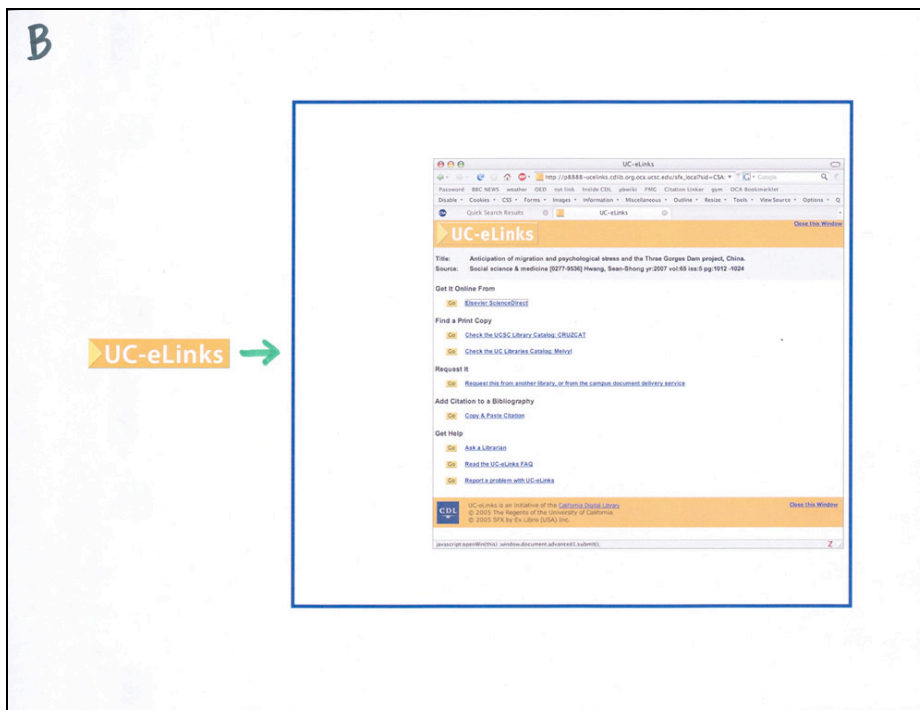
Option C: Simultaneous direct link to full text and separate service menu window
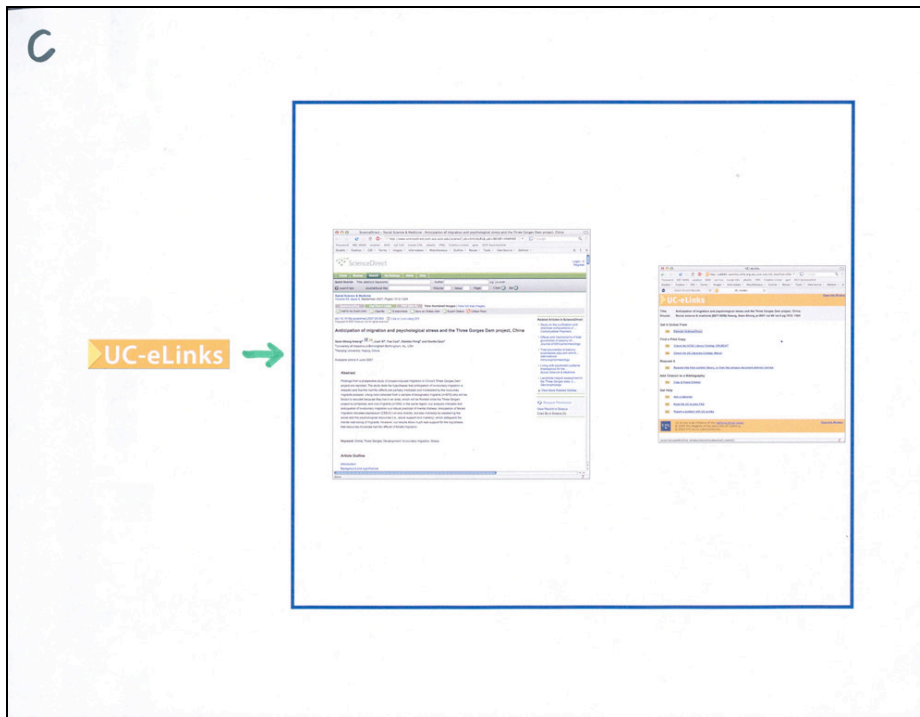
Option D: Direct link to full text in a frame with service options

6.4 Appendix D: Blank Data Collection Worksheets

Question 2	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10
Get full text online										
Find a copy in CruzCat (UCSC Library Catalog)										
Find a copy in Melvyl (UC Libraries Catalog)										
Request a copy from another library										
Add citation to a bibliography										
Ask a librarian										
Add item to course management system, e.g., Blackboard										
Add item to social bookmarking service										
Post item to blog										
See more information about this item (abstract, works that cite this item, etc.)										
See similar items (on JSTOR, Google, Yahoo, Amazon, etc.)										
See related items (by this author, on this topic, etc.)										
Download/email citation										

Question 7	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10
Get full text online										
Find a copy in CruzCat (UCSC Library Catalog)										
Find a copy in Melvyl (UC Libraries Catalog)										
Request a copy from another library										
Add citation to a bibliography										
Ask a librarian										
Add item to course management system, e.g., Blackboard										
Add item to social bookmarking service										
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See more information about this item (abstract, works that cite this item, etc.)										
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See related items (by this author, on this topic, etc.)										
Download/email citation										