

**LINKING TO ONLINE RESOURCES IN MELVYL: OPENURL vs. PID
FOCUS GROUP FINDINGS & RECOMMENDATIONS**

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*PREPARED FOR: UC-ELINKS DEVELOPMENT TEAM
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I. PROJECT OVERVIEW AND ASSESSMENT OBJECTIVES

The California Digital Library (CDL) and the Shared Cataloging Program (SCP) are exploring alternative methods of linking to full text, online catalogs, Request, and other services. Goals include improving service options, streamlining workflows, reducing costs, and allowing for future developments. Currently, online resources licensed by CDL and cataloged by SCP are assigned a Persistent Identifier (PID) and holdings are recorded in the MARC 856 field. Under investigation is the impact of transitioning away from the current PID online linking method and instead toward the OpenURL method (used by UC-eLinks) within the Melvyl environment.

Of specific concern is the impact of the transition on UC public service librarians. Accordingly, in August/September 2005, CDL conducted two focus groups with Users Council members; objectives included the following:

- Determine whether online resources that are available from a **single provider** should be resolved directly to the target resource, or whether it is instead preferable for a UC-eLinks service option menu to open, listing the provider from which the resource is available, along with holdings information.
- Determine the possible impact on Melvyl users of not having holdings information recorded in the MARC 856 field. A consequence of this change will be a lack of specific holdings information within the Melvyl holdings "Notes" field.

METHODOLOGY

In August 2005, CDL distributed an email to all Users Council members inviting them to participate in one of two scheduled focus groups. Seven members were able to participate, plus one additional UCSD librarian. A second librarian from UCSD participated because the UCSD Users Council representative had been newly appointed to the committee. Utilizing the ReadyTalk web conference tool, the discussions took place on August 31 and September 1, 2005, and both ran for approximately one hour. During the first session, five CDL members and five campus librarians participated; during the second session, three CDL members and three Users Council members participated. A member of the CDL Assessment Team led both sessions, which were recorded using the ReadyTalk software.

II. PRIMARY FINDINGS AND RECOMMENDATIONS

Following are the primary findings of the focus group discussions, including recommendations for change and supporting data.

FINDING 1 **For online resources available from a single provider, a majority of participants expressed a preference for including a UC-eLinks service options menu before resolving to the target source, versus resolving directly to the target source.**

SUPPORT DATA Public service librarians whose patron base primarily includes graduate students and faculty are far more inclined to prefer the inclusion of a UC-eLinks menu window, as compared to those librarians whose patron base is primarily undergraduate students. Of issue is the availability of the Citation Linker functionality. Comments included:

- “Speaking from the perspective of grad students and faculty, most are going after a known citation. It’s irritating to have to go to vendor site and search from there. Better to fill in the citation form on the UC-eLinks page and go directly to article. I see the UC-eLinks page as an appropriate place to input your citation information and preferable to doing that on the vendor site.”
- “Our [grad students and faculty] users want to link to the article level, not search through a vendor site. Most of my users have a citation in hand. Citation Linker would be a really nice feature.”
- “I’m not sure any level of user has full citation information. Often they know the volume and end up having to browse. One of the benefits of going to vendor site is that if they’ve got a piece of the citation information wrong they can browse. Citation is another piece of information that they may not have.”

As participants explored the impact on Melvyl users of not having access to a holdings statement for online resources, the need for a UC-eLinks menu service window that includes holdings information became clear. Several participants feared that without a UC-eLinks menu service window, the user would simply have no way of discovering what they should be able to access. Comments included:

- “Bypassing the UC-eLinks screens denies the user an important piece of information, as it may be the only place where holdings information is available. Going directly from Melvyl holdings (which will now be blank) to a vendor means they can’t find out what they have access to.”
- “People may see ‘Available Online’ and a blank area next to it. That can be interpreted as meaning we have access to everything.”
- “Going to a vendor page where you don’t know what you should be getting is a problem, especially if there is a lack of Melvyl holding ‘Notes.’”
- “Users don’t pay attention to a lot of things and just want to get to the journal, but if they get to the journal and can’t find what they want, they need to have a place to find holdings.”

Consistency of user experience, *i.e.*, a UC-eLinks service option window is presented regardless of whether an online resource is available through single or multiple vendors, is not of vital concern to public service librarians. Comments included:

- “I don’t know how big of an issue consistency of experience is.”
- “I don’t think consistency matters all that much.”
- “Consistency matters.”

For those participants who advocated bypassing the UC-eLinks window, the primary reason provided was expediency:

- “Users want less clicks. Take them directly to the journal.”
- “Most users just see the UC-eLinks page as an annoyance.”
- “I’m still inclined to allow people to jump directly to the journal.”

RECOMMENDATION For online resources available from a single provider, include a UC-eLinks service

option menu before resolving to the target source.

FINDING 2

Public service librarians observe that many *non-librarian* Melvyl users, particularly undergraduate students, display a tendency to disregard online resource holdings information contained in the Melvyl “Notes” field, preferring instead to immediately click the “Available Online” link and proceed to the vendor site.

SUPPORT DATA

When asked to describe how students interact with the Melvyl holdings page, a majority of participants report that holdings information contained in the “Notes” field was primarily ignored and that the “Available Online” link immediately draws users’ attention. Two participants described students’ tendency to select the first “Available Online” link listed (typically UCB), but others report training efforts encouraging users to only select holdings for their specific campus. Although the “Available Online” link is enticing and contributes to the tendency to “click first and figure it out later”, the readability of the holdings statement is also problematic. Comments included:

- “The statement ‘Available Online’ is very seductive.”
- “They see ‘Available Online’ and select the link – paying no attention to information in the holdings column. They get into the resource and navigate from there. Sophisticated users do look, but the great majority do not.”
- “Students don’t look at specific holdings. They click on UCB’s, then come back and ask why they don’t see the journal. They don’t pay attention to holdings or campus location.”
- “Some just immediately click on the UCB ‘Available Online’ link.”
- “Seems like people do not pay attention to holding notes information. They see ‘Available Online’ and the first link they see they start clicking away. They don’t pay attention to even the library.”
- “At UCSB we have a lot of sub-libraries. It’s impossible for patrons to notice and understand something is in a different library than the main library. They probably notice ‘Available Online’ the most. I don’t think they really understand the holdings very well. Don’t think we’ve had too many people who don’t scroll down to UCSB first. We train people to look at what our library has.”
- “As soon as they see ‘Available Online’ they click on it. ‘Circ Status’ really doesn’t mean anything. It’s library jargon. Better if this information was compacted and focused. Notes information really isn’t making any sense to users. Very helpful if we could directly say, ‘Print issues available: xxx’ or ‘Electronic edition available: xxx’”
- “The ‘Circ Status’ link for Internet access is confusing.”

RECOMMENDATION

No immediate recommendations. Should the opportunity to redesign the Melvyl holdings page arise, use the descriptions of user behavior above to inform functional requirements.

FINDING 3

Public service librarians perceive themselves as relying heavily on the holdings statements to accomplish their work, expressing deep concern regarding the consequences of not having a “global view” of all UC campus holdings information displayed in the Melvyl “Notes” field.

SUPPORT DATA

Early in the group discussion and before being explained the proposed change, participants were asked to describe how they *personally* utilize the information found in the Melvyl holdings “Notes” field. Comments included:

- “Reference librarians read it carefully. They know what they’re looking for.”
- “As a reference librarian, I look at the holding notes first thing.”
- “Users may not pay attention, but librarians do.”
- “Having holdings show up is important to librarians even if students don’t pay attention to it. I trust holdings catalog records over vendor page”

Later in the discussion, participants became more impassioned about the need for a holdings statement in the Melvyl “Notes” field:

- “I’m still really hung up on holdings information. The library staff has got to have this information. We need someplace to check what we’re entitled to have. I’m advocating that a big thing that we do is that we know what we have, and if we can’t tell our users what we have, that is a big problem. It’s basic – the reference librarians should be able to know what we have.”
- “For scannability, this is a problem. We can’t tell what’s available on different campuses. They’re not going to be able to see campus holdings without going in-in-out-out-in-in-out-out. What if I want to see what UCB has? If I select their ‘Available Online’ link, will I be told I’m not being detected as a UCB user and I can’t see what they have? Will I see the full holdings they have? I can’t pretend to be at Berkeley to see what they have. You guys can see what everybody has. I cannot. If this person is working on a joint project with a colleague at UCB, I’d like to be able to say, ‘your colleague can get this on their campus.’”
- “This loss of functionality is a problem. It may not be functionality we use everyday, but it is important.”
- “I want to see holdings in Melvyl notes field. Do I want to click to find out what we own? No.”
- “Info in Melvyl holdings area is important. I have people who want to drive to UCLA, to know what we have, etc. Whether or not users understand the info, it’s important to me.”
- “Referring someone to another library is important. If we don’t know what other libraries have, it’s a problem.”
- “What is the thinking behind the abandonment of the notes? I’m curious about that. Is it the SCP folks?”

- “You’re saying that since UC-eLinks/ExLibris KnowledgeBase keeps track of Tier 1 resources holdings, we’re trying to minimize the work that SCP people have to do to put holdings info into records?”
- “Why is this happening? There’s also the fact that when you’re helping someone at the reference desk, if you have to clickclick-clickclick-clickclick to get to something -- they’re walking away before you get the answer. So I think this information needs to be available to us as librarians at the soonest we can get it and not have to go searching for it. This is an age group that wants things instantaneously and everything online – they’re running off to class and walking away from you before you answer the question.”

RECOMMENDATION Revisit the CDL/SCP decision not to record holdings information in the MARC 856 field. At minimum, a statement indicating the resource is *available to all UC libraries* should be crafted and included in the MARC 856 field.

FINDING 4 **Public service librarians expressed concern that a lack of holdings statements for online resources will impact interlibrary loan activities.**

- SUPPORT DATA**
- “Will the lack of holdings information on the Melvyl screen impact ILL from a technical standpoint? Because our online holdings will not be in the local OPAC – I’m thinking more of our holdings as they get reflected in outside systems and outside ILL. We’re canceling paper, so ILL of online resources is important.”
 - “Davis does not allow undergrads to ILL outside UC.”
 - “I mostly start with my local OPAC and go to Melvyl to see if other campuses have what we don’t. That’s what the holdings info does for me. We (UCSB) don’t go outside UC for undergraduate ILL. Holdings statements allow me to inform undergrad in front of me whether they should pursue an ILL.”
 - “Being able to see what the other campuses have is very helpful from the ILL perspective.”

RECOMMENDATION Consider conducting interviews with select campus interlibrary loan staff in an effort to ascertain if the lack of holdings information for online resources in the Melvyl “Notes” field might influence their workflow or create barriers to completing their work.

Note: Mary Heath of the CDL reports that the Request service is not dependent upon the holdings information found in the MARC 856 field. Additionally, the proposed changes do not impact PIR from the technical perspective.

FINDING 5 **The current UC-eLinks logo is recognized and its functionality trusted, however, the user interface of the service menu is broadly perceived as less than adequate and in need of modification.**

SUPPORT DATA Participants report that the UC-eLinks link is “very recognizable” by users, and that

students and faculty “take the information included in the menu seriously.” Although the information found on the UC-eLinks menu is trusted, its design is not optimal. Comments and suggestions for change include:

- “Still, the number of vendor options listed on the UC-eLinks page is problematic, it makes your head swim.”
- “Arrangement of holdings appears to be random. Why not arrange by volume order? You really have to read all notes to figure out where your volume might reside.”
- “Is the first choice the one we want them to use? Is this in priority order?”
- “‘Availability’ holdings statement is extremely small and difficult to read.”
- “UC-eLinks page ‘Availability’ link is important. Years of access are a really common question.”
- “Dates of coverage need to be much more prominent.”
- “Show that filling in a citation is optional.”
- “We should state that ‘the University of California pays for these subscriptions...’ because it’s important.”
- “I don’t know that undergrads care who pays for these things. They’re just trying to get to a journal. The icon is recognizable. I’m worried about all this clicking.”

RECOMMENDATION From a short-term perspective, the UC-eLinks design team should implement several immediate changes to the user interface, including increasing the font size of the resource title and “Availability” information. From the long-term perspective, CDL should invest the necessary resources required for a complete assessment and redesign of the UC-eLinks user interface, *e.g.*, information architect, graphic redesign, and usability testing.

III. CONCLUSION

In August/September 2005, the CDL conducted two focus groups designed to assess the impact of transitioning away from the current PID online linking method and toward the OpenURL method (used by UC-eLinks) within the Melvyl environment. Objectives included:

- Determine whether online resources that are available from a **single provider** should be resolved directly to the target resource or to the UC-eLinks service option menu.
- Determine the possible impact on Melvyl users of not having holdings information recorded in the MARC 856 field.

Regarding the first objective, a majority of participants expressed a preference for including the UC-eLinks service options menu before resolving to the target source, versus resolving directly to the target source. Differences in preference between public service librarians whose patron base primarily includes graduate students and faculty versus those whose patron base is primarily undergraduate students were

discovered. Participants generally concurred that “the fewer clicks, the better”, however, as the ramifications of not having access to a Melvyl holdings statement for online resources was explored, the need for a UC-eLinks menu service window that includes holdings information became clear.

Regarding the second objective, participants shared the observation that many *non-librarian* Melvyl users, particularly undergraduate students, tend to disregard online resource holdings information contained in the Melvyl “Notes” field. Nonetheless, public service librarians perceive themselves as relying heavily on the holdings statements to accomplish their work and expressed deep concern regarding the consequences of not having a global view of all UC campus holdings information displayed in the Melvyl “Notes” field. For this reason, it is recommended that the CDL/SCP decision not to record holdings information in the MARC 856 field be revisited. At minimum, a statement indicating the resource is available to all UC libraries should be crafted and included in the MARC 856 field.

Finally, throughout the discussion, participants voiced concern regarding the usability of the current UC-eLinks service menu. Although many of the issues raised are intrinsic to the programming of the SFX linking service from Ex Libris, and thus out of CDL’s control, a thorough investigation by the CDL into how ease-of-use can be improved is recommended.