

# A Snapshot of Melvyl 5 Years into Production

7/10/14 Prepared for SAG2 by Melvyl Operations Team

Goal: UCLAS awareness of the changing WorldCat Local Melvyl environment.

We've provided a rough sketch of the landscape five years into using WorldCat Local Melvyl at University of California libraries. We hope to build upon lessons learned and further investigate and articulate areas of interest. We believe there's value in proactively exploring future directions now that this snapshot is current and understood.

As you scan through this report please let us know if we have missed any critical issues and let us know what compelling areas we should delve into further. What questions would you like to have answered? How can you help us answer them?

## Background & Peer Institutions

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1. WorldCat Local (WCL) Melvyl has been in production for 5 years. In that time, the Melvyl Operations Team has learned much about working with OCLC, and we've seen the discovery landscape and usage patterns change significantly.
2. Why did the UC libraries choose WCL? The Council of University Librarians (CoUL) chose WCL as an end-user discovery tool. WCL represented access to the world's holdings at the network level (connection to the larger research world – the ability to search 800 million+ items from research institutions throughout the world), digitized books and collections– and the promise of continual improvement.
3. CDL and UC campuses started as a WorldCat Local development partner with OCLC. After WCL Melvyl was implemented, we shifted our role from development partner to influential customer. The Melvyl Operations Team and UC libraries have been active on OCLC advisory groups and WorldCat. We've outlined some of the impacts of our involvement under "Current Environment" below.
4. WCL was the only web-scale discovery platform at the time of release. Now, there are at least 3 other major players: [Ex Libris Primo](#), [ProQuest Summon](#), [EBSCO Discovery Service \(EDS\)](#), and a handful of open source products.
5. None of our peer institutions use WCL as their discovery platform. We are defining peer institutions as the eight libraries from the UC Regents "Comp 8": University of Illinois, University of Michigan, University of Virginia, SUNY Buffalo, Harvard, MIT, Stanford, and Yale. See Appendix A. The Orbis Cascade Alliance is a consortium closer to a UC-scale library system. University of Washington was an early development partner in WCL and is in the process of moving to Ex Libris' Alma and Primo along with the Orbis Cascade consortia.

## Current environment

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6. **Downward trend in usage** of Melvyl. We see a downward trend in Melvyl usage statistics for most campuses, but the data provided by OCLC has been unreliable over the past few years. We do not know whether local campus OPACs are also seeing a downward trend in usage and whether a preference for local OPACs is accounting for some of the decline in Melvyl usage. On a related note, OCLC reported decreased usage of FirstSearch in their latest (2012-13) annual report. See Appendix B. This downward trend is an indicator that users are bypassing library catalogs. OCLC has confirmed this trend, and that's why they are putting holdings into search engines to drive people back to WorldCat Local from Google.
7. OCLC is in the process of redesigning their discovery interface and **merging FirstSearch and WCL** into a new platform called WorldCat Discovery Services. The earliest Melvyl would move to the new platform is late 2015; however, OCLC's estimated release date has been extended twice in the two months since they launched the WorldCat Discovery Services beta, so delays are likely to continue. See updates on the CDL website: <http://www.cdlib.org/services/d2d/melvyl/betas.html>
8. The **WorldCat Discovery Services beta** launched in April 2014. We are well positioned to monitor developments: we have three UC members on the twenty-member WorldCat Discovery Beta Advisory Group (two from the CDL Melvyl Operations Team, and one from UC Davis.) The benefit of being on the beta advisory group is we have the opportunity to advise on features, ask questions, and identify "red flags" early in the development process.
9. **Continued support of third-party software such as SFX is an ongoing concern for Melvyl.** Because we have integrated third-party software with WCL Melvyl (Ex Libris' SFX link resolver and SFX Knowledgebase) rather than using the native OCLC products (WCL KB and the WCL internal link resolver), we are closely monitoring Melvyl functionality in the WorldCat Discovery beta. WCL Knowledgebase development needs to be closely monitored because as the customer base of the WCL KB increases, the need for OCLC to accommodate third-party KB software decreases. OCLC product managers are not tracking how many libraries are using their native products vs. third party products vs. using both. We estimate about 8% of libraries are using the WCL internal link resolvers (ILR). (OCLC told us about 200 libraries have ILR accounts, and the total number of WCL libraries is 1724 according to the OCLC 2012-13 annual report.) Based on the same annual report, 1007 libraries have an account for the WCL KB. You do not need to be a WCL library to have a WCL KB account -- libraries with a cataloging account can have a WCL KB account, so it's not possible to know with certainty the percentage of WCL libraries using the WCL KB, but it's not more than 58% (i.e., 1007 WCL KB libraries/1724 WCL libraries. In addition, we don't know how many libraries with WCL KB accounts are actively using the WCL KB. For example, CDL has an account that is used for testing only.
10. **OCLC monthly releases** are frequently delayed and communication about the releases has been mostly poor (scant documentation, inconsistent email notification) which

requires CDL staff time to do analysis and follow-up with OCLC. This points to an immature release process, characteristic of a product with growing pains.

11. CDL is **tracking support tickets** in a parallel system to OCLC's, which is labor intensive, but allows us to respond to end users when a problem has been resolved. This aligns with CDL's strong commitment to customer service. Some tickets are resolved at CDL and do not go to OCLC (e.g., licensing issues). Triaging tickets also provides an understanding of the problems reported so we can identify patterns and critical issues.
12. CDL has a **monthly customer support call** with OCLC's Customer Service Manager, which has been useful in resolving problems.

## Looking ahead

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13. A decision to move forward with a **shared ILS** will likely impact Melvyl, so we are actively monitoring progress of the UCLAS Shared ILS report.
14. How is the role and relationship of **Melvyl and local OPACs** changing? How will we answer this question?
15. How are **search engines and the Open Web** changing discovery and delivery for the UC libraries? What do we need to be tracking?
16. WorldCat Discovery is evolving into a more tightly integrated and user-friendly interface. Customers will get the optimal experience when they are using the **full suite of OCLC's products**. We risk having a degraded user experience by not using the OCLC full suite of products (e.g., WCL Knowledgebase, WCL internal link resolver, WorldShare ILL, etc.). OCLC product managers make development decisions that preference institutions using OCLC's whole product suite.
17. **Metadata** is critical for discovery, but how metadata is cataloged and shared is changing. Linked data is on the rise and OCLC is pushing holdings to search engines using schema.org. The CDL Shared Cataloging Program group is #12 in the Top 15 catalogers in WorldCat (from 2012-13 OCLC Annual Report) while OCLC has stopped crediting UCLA for original cataloging. What do we need to be tracking in this area?

## Future directions

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The CDL Discovery & Delivery Team is monitoring several directions for the future of Melvyl. For options one and two, the landscape is shifting rapidly with the launch of the WorldCat Discovery Services beta.

1. **(Current approach) Keep our hybrid world** of integrating best-in-breed products with WCL (e.g., SFX UC-eLinks).
2. **Move to OCLC full product suite** or adopt key parts of the suite such as using the WCL Knowledgebase. In the example of the WCL KB, campus staff would need to do work. Given the downward trend in usage, would this be a worthwhile investment? See WCL

KB analysis from December 2013:

[http://www.cdlib.org/services/d2d/melvyl/policies/wcl\\_kb\\_analysis\\_dec2012\\_final.pdf](http://www.cdlib.org/services/d2d/melvyl/policies/wcl_kb_analysis_dec2012_final.pdf)

3. **Explore the marketplace** and examine peer institutions' experience with other discovery solutions.

Librarians have frequently expressed their frustration and dissatisfaction with WorldCat Local to the Melvyl Operations Team. Are librarians frustrated with WCL itself or is it the way we've customized WCL and integrated third party products? Are libraries frustrated enough to invest in a new product?

End-user feedback is a critical missing piece. The Council of University Librarians selected WorldCat Local and envisioned it as an end-user product for UC faculty and students. We suspect the Melvyl Operations Team is only capturing a small amount of end-user feedback on WorldCat Local, including feedback filtered up by librarians on behalf of faculty and students. And, the feedback is skewed to those users (and staff) who take the time to send it. We don't have a complete view of what users think about WorldCat Local.

Will our problems follow us regardless of the product? Are *we* the problem? Are our UC configurations, tools, and policies a good match for the WCL product? If not, would *any* product be a good match or do we need to rethink our strategy for discovery?