

# AI & Machine Learning Project FAQ

## Project: Enhancing Virtual Reference

Ask a Librarian is the bilingual virtual reference service offered by OCUL's Scholars Portal that connects students, faculty and researchers with real-time library and research assistance through online chat. LibraryH3lp, the software that powers the service, is developing a chatbot.

As part of OCUL's AI & Machine Learning Initiative, the Enhancing Virtual Reference Project explores the potential benefits and drawbacks of implementing the LibraryH3lp chatbot. At the end of the project, a report will detail an analysis of the chatbot and recommend whether to implement the tool as part of the Ask service.

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### What is the LibraryH3lp chatbot and how does it work?

The LibraryH3lp chatbot is a software program that simulates human conversation using natural language processing and machine learning to respond to user input. For this project, the chatbot relies on querying data from a knowledge base curated by a local administrator at each volunteer institution. The LibraryH3lp knowledge base scrapes web links provided by that local administrator and does not feed data into a commercial AI tool. The chatbot has two interfaces being tested: one for Ask a Librarian staff operators and one for end users. Both interfaces pull their information from a knowledge base using Retrieval Augmented Generation.

### What data are being used to train the chatbot?

We believe in developing tech infrastructure in a closed ecosystem that safeguards data and is administered by OCUL and Scholars Portal. For this project, the LibraryH3lp chatbot only uses data from a knowledge base created by each of the project's participating university libraries. A local administrator from each library provides URLs from their publicly accessible library webpages, typically content created under an employee's job duties, giving each university control over what is added to the knowledge base the chatbot is trained on. This ensures compliance with schools' local intellectual property policies and procedures. Existing chat transcripts are not being used as training data for this project.

### What's been learned so far from the project?

We've learned that chatbots are best used when there is a specific application. In this project, we are focusing on how a chatbot can be used to answer questions about library spaces and services since this is potentially beneficial to all OCUL member libraries.

### How is user privacy considered in this project?

The chatbot tool is not being tested with end users (e.g., students) and will only be available to Ask a Librarian staff operators for this project. The Ask a Librarian service has an existing privacy policy for users and operators, so any future implementation of a chatbot within the service would require additional review of the tool for alignment with that privacy policy.

### Who decides if the chatbot should be part of the Ask a Librarian service?

The aim of this project is not to get to an implementation stage with the chatbot, only a recommendation on if it has met criteria for fair, ethical and effective use as part of the Ask service. The OCUL Council decides whether to implement changes to the Ask service, in consultation with OCUL member library workers, the Scholars Portal Operations & Development Committee and the standing virtual reference governance groups.

Have questions or project feedback?  
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