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Experiences from the Field: Choosing a Discovery Tool for YOUR Unique Library

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Abstract:

Our users want an easier way to search library resources; currently, there are many discovery tools available, which can seem daunting. How do you know which one will work for your unique library? Librarians from different types of libraries—an online library, a land-grant school, a law library, a private university, and a consortium—describe how they evaluated the available products and made decisions on which tools to implement. A variety of platforms are discussed, including: Ebsco's Discovery Service, ILL's Encore Synergy Discovery, Serials Solutions' Summon, and even a homegrown solution. Discover what libraries are looking for in these tools, strategies for determining which one best fits your needs, and lessons learned throughout the process from the investigation phase to implementation.

Introduction

Increasingly, our users have expressed a desire for a "Google-like" experience for library resources, because—let's face it—doing research in library collections takes more work. Database vendors and publishers have varying platforms with different interface features, and you may have to search five, ten, or even twenty separate places to find what you are ultimately looking for. Students seem to recognize the differences between free resources found using a search engine and subscription resources accessed through the library, but they may not immediately see a clear advantage to searching a subscription database if it is not intuitiveⁱ. In addition, many of them don't necessarily care which database in the library the information came from; they want good-enough, reliable results and they want them quickly.

In a recent study, the University of Illinois found that "students rarely ask librarians for help, even when they need it."ⁱⁱ With this evidence, how do we ensure that the students who are not asking for help are able to begin their search process for relevant, authoritative information from the library's website? In order to make information more accessible and to enhance the user experience, many companies have tried to mirror the Google-like search by developing Web-scale discovery tools or solutions to search

across library collections. Each of these tools has their own unique benefits, but most discovery tools have the following things in common:

- Common interface for searching licensed, local, and open collectionsⁱⁱⁱ
- Centralized index of metadata including records for information in various formats, such as books, videos, articles, reports etc.
- Single search box option
- Fast search results
- Limiters/facets to narrow down search results
- Links to full text

These discovery systems fill a void by providing a single interface that is intuitive and uses controlled vocabulary while searching across library collections. However, with the many products currently available for discovery tools, choosing one can seem intimidating. How do you know which one will work for your unique library? This paper brings together librarians from different types of libraries who explain what their evaluation processes were like, the factors that influenced their decisions, which tools they chose, and the impact that they have had so far.

A wide range of experiences are highlighted including a completely online library with no catalog or

local holdings, a land-grant school, a law library, a private university, and a consortium. In addition, a variety of platforms are discussed including: EBSCO's Discovery Service, Ill's Encore Synergy Discovery, Serials Solutions' Summon, and a home-grown product.

Johns Hopkins University, Entrepreneurial Library Program-Excelsior College Library:

Jennifer Castaldo

The Entrepreneurial Library Program, a department of the Sheridan Libraries at Johns Hopkins University, develops and provides financially sustainable services to clients outside of the JHU library.

Through a long-standing partnership, we run an online library for Excelsior College. Excelsior College itself is completely online with no physical campus. The Excelsior College librarians chose and implemented EBSCO's Discovery Service (EDS) in March 2011. Other systems that we currently use include Serials Solutions 360 Core and 360 Link.

During the investigation phase, we briefly looked into WorldCat Local, but since we do not have any holdings currently in WorldCat and no ILS, we narrowed down our options to concentrate on EDS and Serials Solutions' Summon. All of the librarians were involved in the evaluation process as we evaluated what would best meet our unique needs as a completely online library with no physical holdings and no "traditional" catalog. We started with multiple on-site visits from the sales representatives. Then, we tested the products with trials and asked for guest access to other schools' implementations. We also held one-on-one phone meetings with librarians at other schools who have implemented each tool to learn about their experiences first-hand. All of the librarians we spoke with were positive about the tool that they were currently using, so we knew we had two good choices. After exploring both tools, the librarians met and listed out the pros and cons of each tool for our particular population on flip charts. Ultimately, (after multiple meetings) we decided on the one that had the most features that would work best for our distinct users.

There were a few main reasons why we ultimately chose EDS. One factor that played a large role is that many of our current database subscriptions are from EBSCO, so most of our users were already very

familiar with the features of that interface. Also, since we report all of our data to Excelsior College it was important to us to have a tool that kept separate usage statistics for each database included in the discovery tool so that we could continue to evaluate usage of our collections in this manner. In addition, we have limited programming support in the Library, so we needed a tool that would be easy to implement with little to no programming expertise required. EDS has a search box builder that was very easy to use. Finally, our users take advantage of the EBSCO feature where items can be placed in personal folders that are saved for future sessions. The other product that we evaluated did not have this feature at that time, so we knew our users would miss that.

Implementation for us was fairly easy. We named the tool—OneSearch—created a logo with the help of our college's marketing department, and customized some parts of the interface (which is highly customizable) to include our branding, colors, and preferred search options. Then we added in the databases that were not indexed by EDS to the Integrated (federated) Search (EHIS), which is located on the right. So, students can pull these outside databases into their main list of search results as well, making for a seamless and comprehensive search process. The only downside that we have experienced so far is that we have had some connectivity issues with our federated search connectors failing for a couple of weeks at a time, but this is an issue that EBSCO seems to have resolved. As of now, all but three of our subscription databases are included in our discovery search (including our EHIS connectors), which makes it a fantastic starting place for our users.

OneSearch is very visible on our library's homepage. So far to market this tool, we have held two webinars: one for faculty and one for students. We have also developed a Captivate video tutorial about it that is located right underneath the search box on our homepage, and we have written numerous articles for the student and faculty newsletters.

The librarians discussed at a recent meeting that as a team we feel as though our reference questions are getting more intelligent and we attribute this in part to our discovery tool. For example, in the past

we would get more basic questions such as I need articles on dyslexia, where do I start? Now the starting place is very apparent on our homepage, so we are getting more informed questions such as I searched for this and these were my terms, but I did not find exactly what I was looking for. In addition to savvy users, our usage for two databases that we were reevaluating due to low usage are up due to discovery, and this is for full text retrievals, not just searches, so we are thrilled about that.

Of course, we always want to do more. We hope this year to look into more customizations such as adding links for our CampusGuides to the interface, perfecting our main search box on the library's homepage, and creating more custom search boxes to go in online courses. We will continue to monitor and evaluate EDS to ensure that it continues to meet our needs, and we look forward to reviewing additional feedback from the students on our annual library survey, which comes out in the spring of 2012.

***American University; Washington College of Law;
Pence Law Library:
Christine K. Dulaney***

In selecting and implementing a discovery layer, the librarians of the Pence Law Library at the American University Washington College of Law were fairly certain of the product they were going to purchase. The Pence Law Library maintains a library collection of legal materials in support of the research and scholarship of the law school's faculty and students. Although the Pence Library is part of American University, the law librarians are solely responsible for managing the collection and for ensuring that the research needs of the law school community are met. Over 25 years ago, the law library began a relationship with Innovative Interfaces Inc (III), when it purchased III's original acquisitions and serials module. Since that time, the library has continued to upgrade and purchase new III modules for what has evolved into the library's integrated library system (ILS). Consequently, when III announced the release of its discovery layer, Encore, and most recently, Encore-Synergy, which integrates full-text article searching with catalog searching, the law library faculty decision to purchase and implement this product was straightforward.

In responding to a rapid technology change cycle, the Pence library's guiding principle is to move forward as quickly as possible in upgrading and developing library systems. The library faculty committee, which consists of both public and technical services librarians, meets on a monthly basis in order to discuss, evaluate and review significant purchases of content or library technology.

In evaluating the requirements of a discovery layer, the library faculty defined three priorities. First, implementation should not require significant technical expertise. Second, the discovery layer should integrate seamlessly with existing ILS modules. Third, the vendor should be able to provide strong customer service support and be responsive to library needs. Because Encore-Synergy is a hosted solution which fully-integrates with the library's existing ILS, and because III is a familiar vendor with a strong tradition of customer service, the Pence librarians decided to purchase the Encore product.

Implementation consisted of two stages. The first stage was to review and customize the "look and feel" of Encore. The library requested the most current Encore interface—the "cobalt skin." This upgraded interface significantly changed the existing layout of Encore features by eliminating the tag cloud, adding an action bar, and simplifying the browse screen. The second stage involved implementation of Synergy—the integration of full-text article searching with catalog searching. For this stage, the library faculty selected 20 database aggregators and grouped these databases into broad categories or "portfolios." Through the use of these portfolios, library users can target their searching to an appropriate database. These categories include Legal Periodicals, Current Legal Information, International Legal Periodicals, Legal History, Periodicals and Newspapers, and US Government.

Although the initial implementation is considered complete, updates and changes to the setup of Encore Synergy continue as an ongoing process. The coming spring semester marks an official roll-out of the Encore Synergy discovery layer which will be followed by user testing to optimize functionality for library users. Analysis of user logs and click counts will provide additional information regarding the usefulness of the new discovery layer and integrated

article searching. A constant review of user needs and accurate usability assessment remains a critical priority for the future in order to remain current with the changing needs of students, the growing development of new research areas, and the increasing sophistication of library technology tools.

***Kent State University & OhioLINK consortium:
Tom Klingler***

Kent State is the second largest institution in OhioLINK, a consortium of 88 academic libraries in Ohio. At Kent, I serve as Assistant Dean for Technical Services, Collections, and Systems. I have a long history of service to the consortium on a variety of committees and task forces over the past 23 years. From 2008 through 2011, I chaired the OhioLINK Discovery Layer Task Force, which has been charged with selecting a discovery tool for the consortium. We have designed a discovery layer that is based on open source technologies from Index Data. (<http://www.indexdata.com/>)

The Task Force includes a mix of public service librarians, systems librarians and programmers, and OhioLINK technical staff. We conducted a formal specification process, RFP, and evaluation process in 2008 and 2009. Details were shared throughout the consortium. The RFP process included a formal question/answer process for the vendors, a collective vendor visit day, and individual vendor visits. We investigated all the discovery vendors, including III, OCLC, Serials Solutions, EBSCO, and others. Since we were interested in the option of building our own discovery layer, we also investigated tools provided by vendors like Mark Logic, Index Data, and Deep Web Technologies.

We decided to go with Index Data for three major reasons: functionality, flexibility, and cost. The consortium could not afford to commit to \$1million+ per year for any of the standard vendors, the cost to provide a central discovery layer for the consortium and local customization for 88 institutions. And, we needed functionality that did not exist. Our specifications called for a unified local index, a combination of central and local federated search targets, local branding, the flexible provision of social media services, and a service proxy layer that would manage things like allowed target database lists and institution-specific authentication.

We recognized that we needed a vendor who could enter into a co-development relationship with us. And we would have to divide the technical development work between OhioLINK technical staff and Index Data staff.

Implementation has been slowed by a variety of political, administrative, and financial crises in the consortium. Key consortium personnel have recently left, including the Executive Director, and the technical assistant director who was the chief architect of the planned discovery layer. Several administrative reorganizations within the state government division that includes the Board of Regents have further diluted the focus of the project team. While Index Data has delivered all of its required components on time, and has given extra help beyond what was contracted, the full complement of OhioLINK technical staff required for the project has not been made available. Hence, key components have not been deployed. For example, although Index Data delivered the architecture for the unified central index, as of this writing, no progress toward deployment has been made since no OhioLINK staff have been available to populate the index with OhioLINK-owned metadata.

Consequently, we have little to show as of this writing. Work is underway on the first phase of the OhioLINK Discovery Layer, which will be the replacement of OhioLINK's current "QuickSearch" federated search tool, which searches an array of basic central resources. Later steps would include: 1) the full development of the very large, central unified index of all OhioLINK-available metadata; 2) the addition of more resources to the central federated search; 3) the integrated real-time delivery of centrally-indexed and federated search results to the patron; 4) custom local institutional provision of locally-licensed resources; 5) local branding; 6) transplantable search widgets; and 7) integration of social media tools.

Only time will tell if the complex and unique plan for a locally-developed, consortium-wide discovery layer will ever be seen through to completion. Lesson learned: Proceed with caution when designing highly complex, customized systems in times of administrative and economic turmoil, especially when those

systems require a dedicated technical staff that does not exist when the plan is being developed.

Montana State University Library:

Doralyn Rossmann

Montana State University (MSU) is the state's land-grant institution in Bozeman. We implemented Serials Solutions' Summon product in July 2010.

Prior to implementation, MSU spent much time and resources investigating multi-resource searching technologies. We formed a Federated Search Task Force (composed of librarians from across the library organization) which produced its final report in spring 2007. This report offered an analysis of federated search, its advantages, issues of concern, and priorities for selection. While a specific product or course of action was not recommended, it provided an endorsement of implementing this or a similar technology as long as there was proper personnel support available for such a product. Discovery tools quickly gained momentum as an option for libraries around that time. In the fall 2009 and spring 2010, we accepted an invitation to participate in a trial of OCLC WorldCat Local in conjunction with the State Library of Montana, a public library, and an academic library. With this experience, a review of the aforementioned report, a long-standing successful relationship with Serials Solutions, and a good price quote in hand, our Dean opted for a 3-year contract using Serials Solutions Summon product. We did not explore other discovery products (except WorldCat Local) much beyond investigations at conferences and browsing their Web sites.

There were several factors we considered in implementation. These included, in no particular order:

- Use of accepted protocols and standards (e.g., OpenURL)
- Broad coverage of our subscribed and purchased resources and the ability to index local content, such as digitized special collections.
- Limiting results by content type, subject, date, full-text, peer reviewed publications
- Sorting and de-duplication of search results
- Implementation time
- Exporting features, including various

citation formats

- Quick retrieval time
- High functionality right out-of-the-box (i.e. does not require much customization in order to function)
- Provision of usage statistics
- Good response time from vendor regarding issues, problems, questions
- Presence of a strong online user community

Summon had these above features and, since we already had many Serials Solutions products, we got a good subscription price and anticipated relatively easy implementation since our resources were already actively tracked in the Serials Solutions Electronic Resource Management System. Our choice was highly motivated by our successful, existing relationship with the vendor, by the fact that our rival institution (University of Montana) already had Summon, time constraints (implementing something in the summer in time for the fall semester), and cost. An implementation team was formed and consisted of the Electronic Resources Librarian, the Associate Dean, the Team Leader for Cataloging and Processing, the Head of Systems, the Team Leader of Reference, and the Team Leader of Digital Access and Web Services. After implementation, primary responsibility for Summon fell to the Electronic Resources Librarian in consultation with other implementation team members, as needed.

We named our Summon instance "CatSearch." Implementation was not as smooth as anticipated. Since there is not a way to do a trial of Summon, some issues are not clear until the library's data has been "ingested" in the Summon index. A few issues arose which we were able to address (such as the display of call numbers for items from the library catalog—call numbers are pulled from the MARC record, rather than the item-level, so local classification schemes may not display. Also, bad metadata from one vendor resulted in putting hyphens in URLs and caused broken links to search results). Another issue is with the data passed to the Open URL resolver from Summon when connecting to articles in aggregator databases.

Some questions linger with regard to using CatSearch. While the Electronic Resources Librarian serves as the primary contact for making adjustments to and fielding questions about CatSearch, it can be a lot of work to add to one position which may already be very busy. The frequent updates by Serial Solutions (currently every two weeks or so) can be satisfying for fixing pressing problems and challenging when new features are introduced or new problems are accidentally created. How to use CatSearch in library instruction varies by librarian. Some people use it to demonstrate basic database features and to find items that are multidisciplinary but others do not focus on it at all. Also, not all databases are ideally suited for the Web Scale Discovery environment, so turning off some resources in the Summon index (such as the ProQuest EASI Market Planner) may be preferable.

Because the preponderance of broken links discovered early in implementation, some librarians and patrons are hesitant to give CatSearch another try. But, our statistics show that many people are using CatSearch. In the first two semesters of implementation, we received 375,000 hits on our library Web page and 100,000 searches were performed in CatSearch. An analysis of the searches performed, using the Summon usage logs, showed a high quality in the search terms used (e.g. use of Boolean operators, narrowed subject terms). So, while initial implementation was rocky, CatSearch is more stable and reliable and continues to improve with the regular enhancements and fixes made by Serial Solutions. In addition, it is important to note the importance of the roles the library plays in serving as advocates and mediators between Web Scale Discovery system providers and the content providers. MSU regularly reminds vendors who have not allowed their content to be indexed in Summon or who do not adhere to OpenURL metadata standards that they only hurt themselves by making their data less findable.

***George Washington University Libraries:
Laura Wrubel***

George Washington Libraries is an ARL Library and is part of the Washington Research Libraries Consortium. We chose EBSCO's Discovery Service (EDS). Other systems that we currently use include our Aquabrowser catalog, Voyager ILS, SFX link

resolver, LibGuides, and Serials Solutions 360 Resource Manager ERM.

We investigated EBSCO Discovery Service, Ex Libris Primo, and Serials Solutions Summon. Our formal evaluation process was led by a four-person task force with representation from Reference, Instruction, Collection Development, and E-Resources. We sought to involve as many people as possible throughout the library, particularly in the steps of developing criteria and evaluating discovery layers against those criteria. By encouraging widespread participation in our evaluation, we hoped to build an understanding across the library of what Web scale discovery is, ensure we were considering a broad range of needs and perspectives in our recommendation, and help surface issues we would need to plan for in implementation and instruction.

Our criteria for evaluation covered the following areas:

- Content, including both vendor-supplied content and support for loading local collections with various metadata
- Search, including not just search options, but refining, facets, and results list functionality
- Consortial records and services (We desired to load records from all of the libraries in our consortium and connect to our consortial loan system.)
- Customization
- Other criteria such as vendor documentation and support

We used Google Forms and a wiki to share information across the organization and track feedback and evaluation of the products against our criteria. Units and staff throughout the library were assigned primary responsibility for evaluating each of the products against our criteria. We also asked student assistants in the library to use each of the products and respond via a survey about the experience. A library staff member interviewed several faculty members after showing them the trial sites or other customer sites we were using in our evaluation.

After considering the comments received from staff through the evaluation process, the task force con-

sidered not selecting any product at that time, as no one product emerged as uniformly preferred. Nonetheless, the task force felt there was an opportunity at that time to build on momentum developed during the evaluation process and experiment with web-scale discovery. Some of the factors that were important to us in our final decision were how well the discovery layer would integrate our full collection (not all of which is searchable via the discovery layer) and usability of the product. We committed to a one-year subscription to EDS.

The implementation of our catalog within the discovery layer was somewhat complex because we loaded records from three ILS's within our consortium and set up real-time availability checks with each. We have only had EDS, called "ArticlesPlus" up on our site since mid-August, so we have limited experience with it so far with it in production, but

are starting usability testing and collecting usage statistics and feedback.

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