

Discovery Service Project

(Concluded January 2012)

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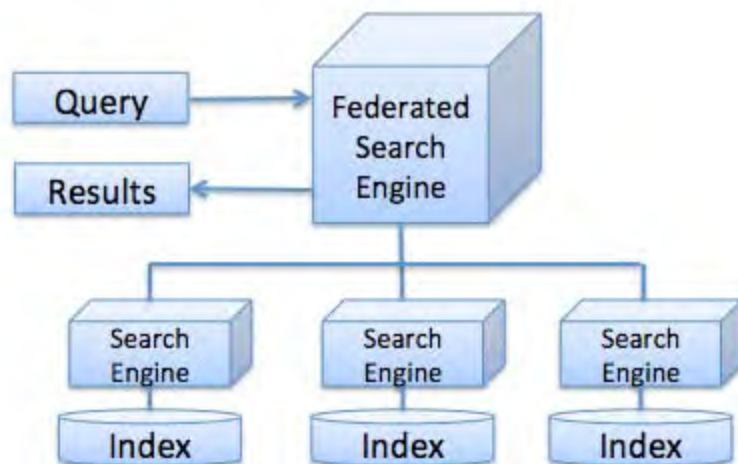
What is a “Discovery Service”?

Discovery services are designed to provide a one-stop-shop that provides a relatively comprehensive coverage of resources available within and beyond the walls of a library:

- Library owned/held items e.g.:
 - Library catalogue (books, dvds, etc.)
 - ClickView (digital video, audio, resources)
- Library paid access to resources e.g.:
 - AnatomyTV (video, ebooks)
 - CINAHL (index to articles, book chapters, etc.)
 - Oxford Art (encyclopedia)
- Non-library held/access resources:
 - Articles
 - Freely-accessible items (open source journals, etc).

Discovery services have been available since 2009, with Summon, (from ProQuest/Serial Solutions), being the first general release offering. The “major players” are well established companies that aggregate content from a range of sources, (EBSCO, OCLC, ProQuest/Serial Solutions). Companies that provide integrated library management systems such as Voyager (Ex Libris), often have a product/service to offer as well.

The aim of these services is to provide a “Google for Libraries” – the simplicity of internet searching coupled with the quality content that libraries offer and provide. These services work in much the same way, by having a centralised, pre-harvested index, which normally relies on numerous agreements with content providers such as publishers, indexing services. Due to the commercial nature of these agreements, it’s not normally possible to get 100% coverage of all library owned and accessible resources, and there is often a relatively small proportion of material which will need to be retrieved using federated search.



Discovery Service Investigation

This

Timeline

June-August	Research conducted about suitable vendor candidates	
August	Questionnaires developed and sent to two vendors identified	
September 12-14	Questionnaires received and clarification sought as needed	
September	Some further questions answered	
September-October	Sought trials, provided necessary data and information	
October-November	Trials established for EBSCO EDS and OCLC WorldCat Local	
November 24, 25	Product demonstrations given by vendors	
December	Semi-structured evaluations conducted by Library staff	

Research conducted about suitable vendor candidates

A literature search was started early in June, to get background information about each of the major discovery service providers. During this process we discovered a Library Technology Report from January 2011, which provided an excellent summary, and the basis for a questionnaire for vendors.

In late June an environmental scan was made of other ITP Libraries, to see which choices they've made, and how they've worked for them. Some libraries have found that using products from different vendors has caused problems – for example linking to full-text is not consistently smooth when an EBSCO database provides a link which is then resolved by an Ex Libris link resolver.

Results of vendor research

We have a significant number of EBSCO product subscriptions and EBSCO produces several highly regarded and specialist databases. CINAHL, (Cumulative Index to Nursing and Allied Health Literature), in particular is heavily used by nursing faculty and students, to which EBSCO is the exclusive rights-owner. It's not unusual for library/information vendors to make bibliographic data available to others; however EBSCO data is largely unavailable to competing businesses (Rochkind, 2011).

For this, and other reasons, two vendors were discounted. EBSCO was a firm candidate, but OCLC WorldCat Local was confirmed as another vendor worth investigating, as it was apparent that they had a good working relationship with EBSCO.

Discounted Candidate Vendors

ProQuest/Serial Solutions - Summon has been effectively discounted for the following reasons:

- Existing UCOL ProQuest commitments are relatively small, (ProQuest Science, Safari TechBooks, and ProQuest Arts, now subsumed into ProQuest Research Library), and not necessarily crucial resources.
- Direct competitor to EBSCO, which could easily make integration with our considerable EBSCOHost databases problematic.
- Completely different knowledge base of library holdings and e-content, which would be time consuming to migrate.

Ex Libris - Primo Central has also been discounted, but for reasons of a more strategic nature:

- Could complicate choice of ILMS replacement/next generation (URM) choice in the future, as Primo, and Primo Central, work most efficiently with Ex Libris ILMS products such as Voyager.
- Direct competitor to EBSCO, and integration with our EBSCOHost databases could be problematic.
- Completely different knowledge base, which would be time consuming to migrate.
- Does not have the same benefit of existing relationships with publishers to the same extent of either ProQuest or EBSCO.
- Not well established as an aggregator, which could mean that new relationships and material could be delayed.

Major vendors which offer the most significant value and opportunity

EBSCO – EBSCOHost Discovery (EDS):

- Uses same search interface as EBSCOHost databases.
- Takes advantage of full text found in existing EBSCO database subscriptions.
- Use UCOL's library holdings and e-content knowledge base, EBSCO A-Z.
- The Library can set profiles which allow pre-defined collections to be searched. For example, a Nursing profile will make it easier to provide search results which are relevant to our nursing students.
- Already selected by Kotui (a NZ consortia for New Zealand Public Libraries), as well as Massey University.

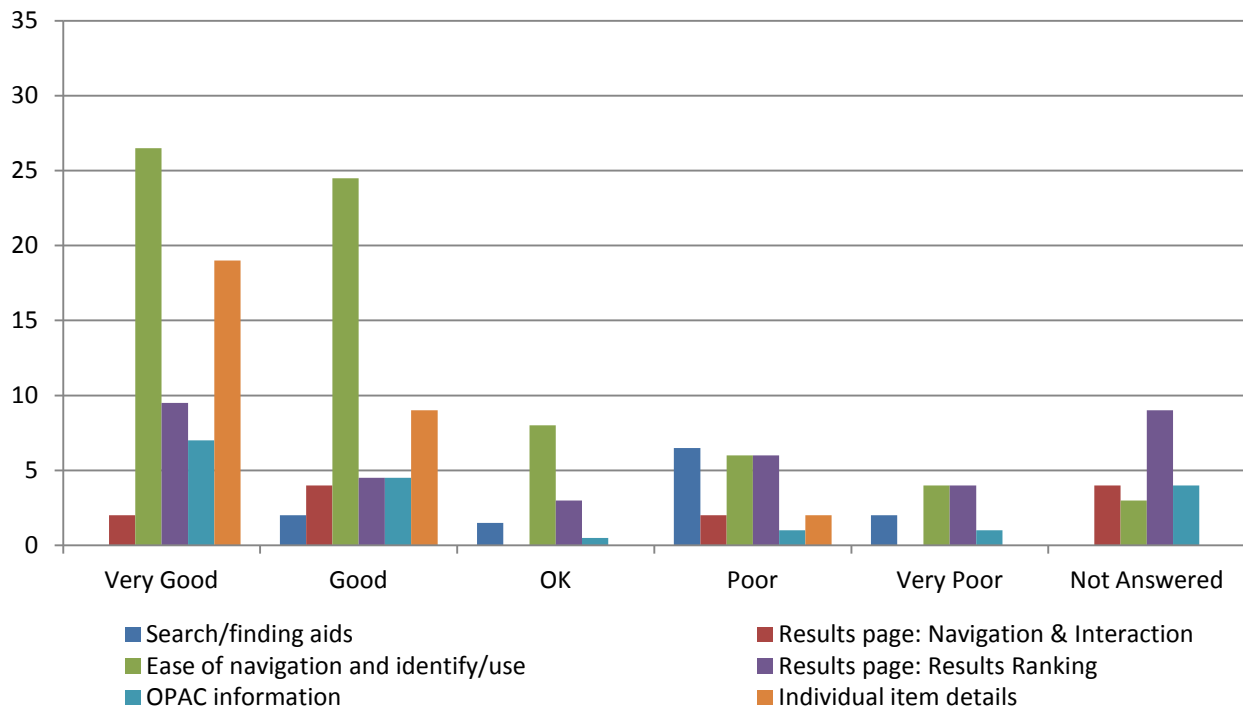
OCLC - WorldCat Local:

- Library-aligned entity – WorldCat contains the aggregate of collections held by libraries world-wide, including UCOL Library. The result is the world’s largest bibliographic database, with more than 500 million indexed items.
- OCLC has direct agreements with major vendors, including EBSCO.
- Well respected vendor of library products used in New Zealand, including VDX (used for national Interloans system), and EZProxy (used for provide remote access to licensed resources, by UCOL and many other tertiary libraries).

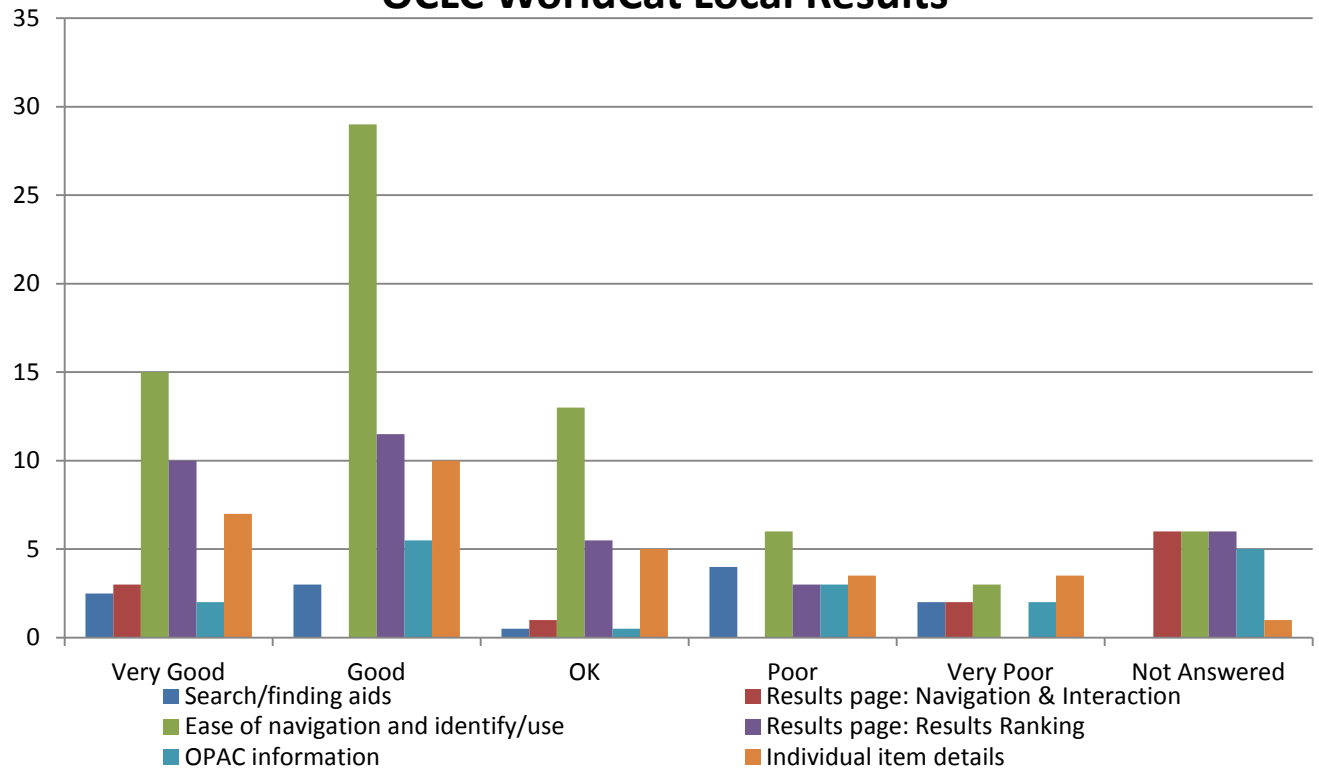
Results of evaluations conducted by Library staff

The Discovery Service trials were quite different in their implementation. OCLC’s WorldCat Local was incomplete, which made any comparison very cumbersome. To get an accurate idea of the strengths of WorldCat Local, staff had to look at two different implementations, including the UCOL trial which had an incomplete coverage of UCOL subscriptions and material. The EBSCO EDS trial was easy to evaluate, since EBSCO already have information about our configuration, and staff are familiar with the EBSCOhost interface, which is almost identical to that of EDS.

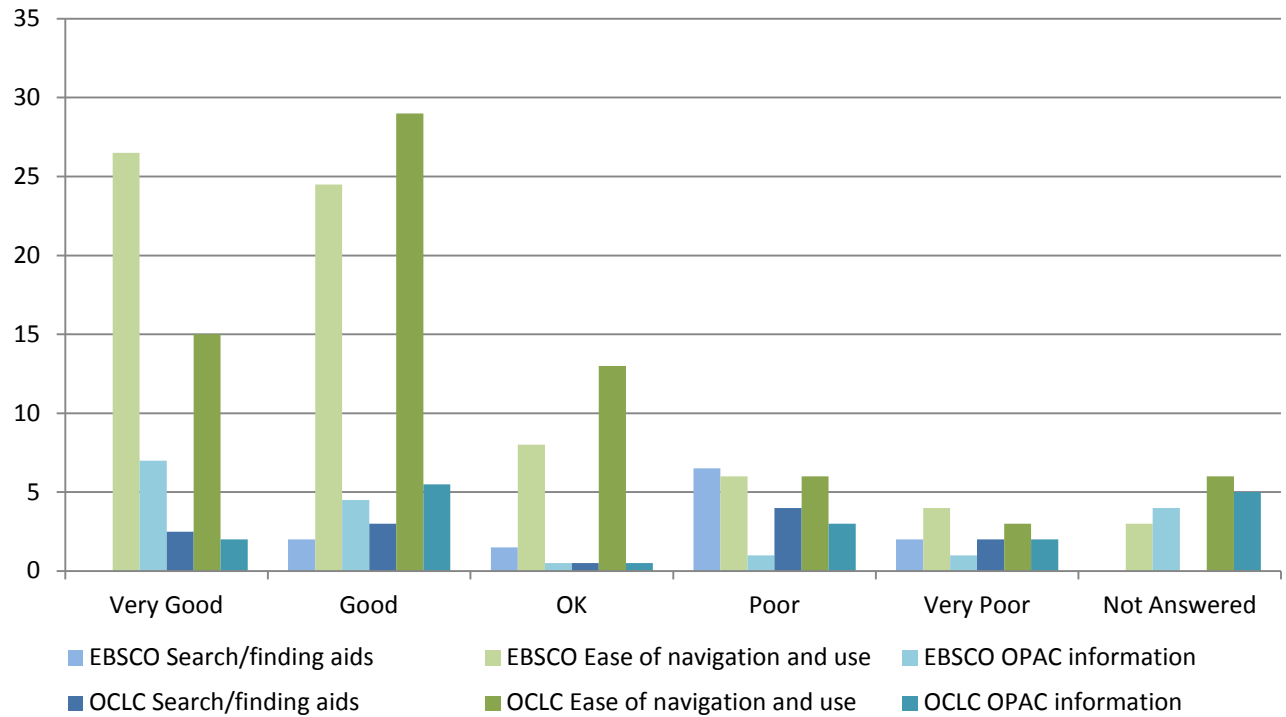
EBSCO EDS



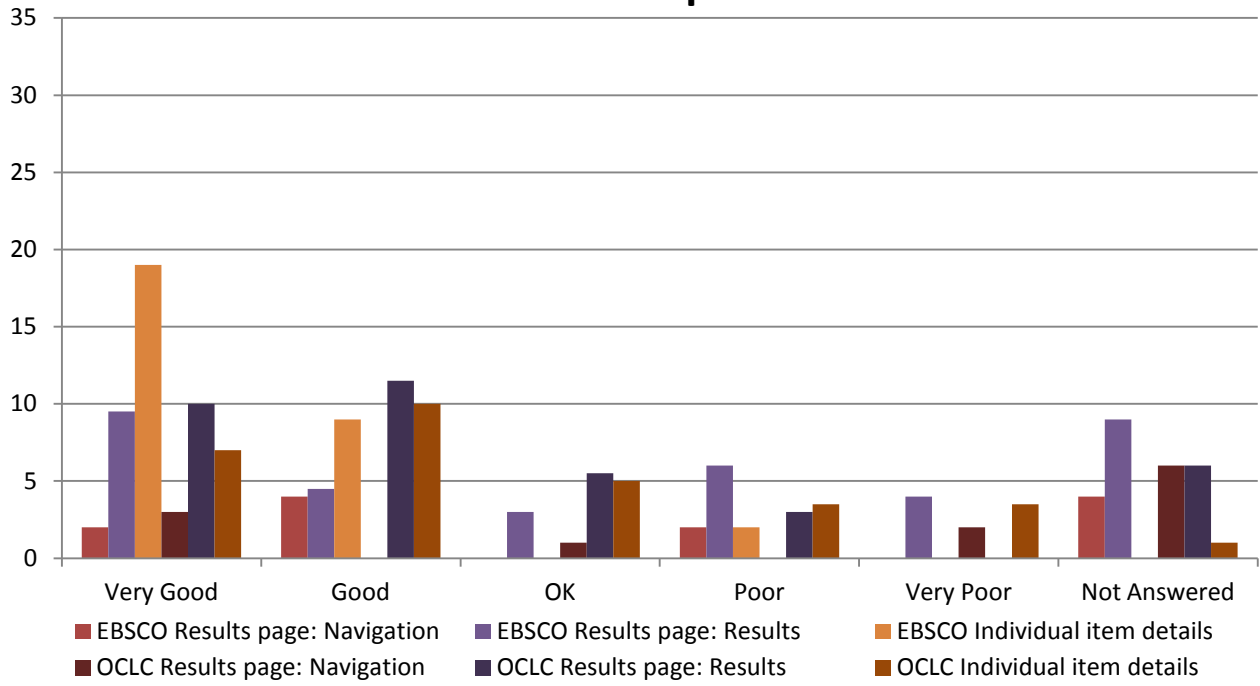
OCLC WorldCat Local Results



Interface Comparison



Results Comparison



Ultimate verdict

Ultimately, the consensus amongst the Library staff was that while the discovery services were good, they were not ready for use by UCOL students. We wanted a basic one-stop for certificate level students, as well as those doing degree level study, and felt these students would need to do quite a bit of refining to get suitable results. We needed something that despite being complex in the background, was easy to use and which delivered appropriate results which the students can work with for their study.

For the EBSCO EDS which was the most preferred option, there were still a number of suggestions which the Library staff thought might help our students:

- an “always-on” spellchecker – even if there are results returned, the search terms are checked for correct spelling
- the ability for the library to setup some popular, yet complex, refining methods which bundle several search refinements together, such as last 10 years + available in print or online (which would be popular with our Nursing students)
- inclusion of a reading level comprehension component in the base index, and possibly being able to split-out or limit the base index along these lines. Certificate in Health & Science students doing search to get a basic understanding of cancer do not need the same in-depth results as a 3rd year Nursing student doing the same search.

References

- Rochkind, J. (2011, January 22). *EBSCO refuses to supply content to Ex Libris aggregated search*. Retrieved May 31, 2011, from Bibliographic Wilderness : <http://bibwild.wordpress.com/2011/01/22/ebsco-refuses-to-supply-content-to-ex-libris-aggregated-search/>

Appendicies

Comment summary for EDS Discovery Service

Comment summary for Worldcat Local Discovery Service

Comment summary for EDS Discovery Service

Search/finding aids

“Did you mean?” only offers results when no results are found - should be more visible.

When spelt wrong it is underlined, but only after you add a space after the word. No auto-suggest

No suggestion of spelling mistake with “asesment” (94 results), however the correct spelling yielded 228,471 results.

Refine by date is NOT working correctly – was caught in a loop between refining by date and refining by peer-review. Did not seem to like combining limits – e.g. by date; peer-reviewed; source type together.

Book appeared in full text articles but was not an electronic book.

Searched on a serial title, but it did not come up first.

Results page: Navigation & Interaction

Source title should be on a separate line (not very obvious), but author of the item is easy to find.

Did refine by Peer Review and the results did update, but there is no icon indicating if items are peer-reviewed or not. An icon indicating peer reviewed status would be good.

Full-text is only shown if available, not if it’s definitely not available [student comment]

Permalinks work, but it’s not apparent where it is. Permalink also add brackets around my phrase in the linked page, which looks odd.

Add to folder icons change to signify that it has been added to the folder – good. Does not inform user that folder is for session only, and need to login to keep material for longer periods.

Roll-over for the summary is good.

Journal title italicisation is erratic.

All 3rd-party sources open in new windows.

It would be good to have an indication on peer-reviewed sources.

Limited options to limit results (can’t limit by “format” e.g.: audiovisual, video, audio, image.) More relevant to OPAC functionality, especially since we use ClickView ([data which was not included in our catalogue dump for Ashley](#)).

Inconsistent bolding of search terms.

Filter Your Search:

add filter: Date: 2001-

add filter: Date: 2006-

add filter: Format: Audio

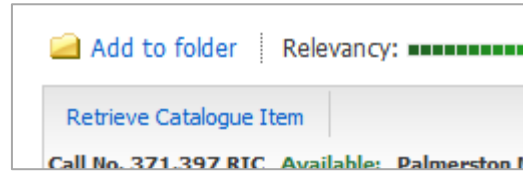
add filter: Format: Images

add filter: Format: Video

Individual item details

Mouse over details icon is very useful for quick check and search terms are highlighted

OPAC display is generally very good, would be nice if we could rename the link for "Retrieve Catalogue Item".



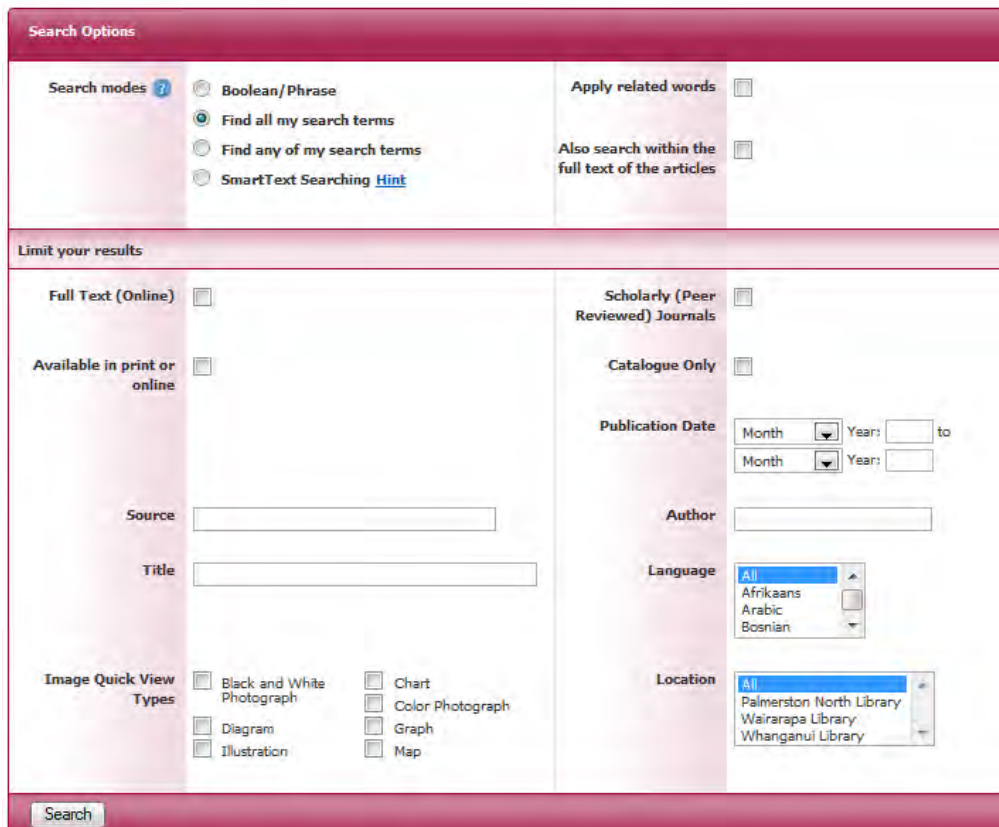
Serials holdings in records are "nasty" – too long, not in branch alphabetical order, just a mashup (-some of this could be due to Voyager Z39.50 configuration?).

No holdings statement showing (-sorry, I didn't pick up on this once Ashley had completed the import of our data).

General comments

Very slow – speed is important ("any longer than 10 seconds and I would give up" – student). "Quite a bit slower than [other discovery service]." Refining results particularly took some time.

Refine search options looks messy and almost appears that you need to check something on the left to use the options on the right.



Refine by date (left column) – cannot go to earlier dates once changed to later date. This also will not update from the ‘show more’ options when they are changed.

Side column refine search options should have full text (online) and catalogue only as radio buttons – it’s possible to check both, and not get the results you’d expect (since these are mutually exclusive).

We currently have the “search within full text of articles” automatically applied to a search, when you cancel that option, you cannot get it back unless you do a new search.

Feel results numbers are overwhelming, especially if limits not working correctly, or as expected.

Interface is quite busy/cluttered (even with 2 columns). Using 2 columns and hiding column on far right would obscure federated search results.

Can the “Library catalogue” be moved to the top of the list of source providers?

Comment summary for WorldCat Local Discovery Service

Search/Finding Aids

Auto-suggestions

If [users] meant to spell it wrong, it doesn't allow you to choose between the spelling.

Suggests relevant searches

Suggested "children mathematics", (- no "d"), as well as other options with children mis-spelled in same way

Assessment (misspelt) yielded results, and no suggestions.

Results Page: Navigation & Interaction

Refine by date

- should be able to do a range in the side column
- very good for recent years – more steps for older material

Sharing; Printing; Email options

- can easily share etc. but you aren't sharing an abstract or anything, just a link and title basically
- font small – lost on page

Visibility of Fulltext availability

- replicated option to limit. Ticking one [side panel] does not tick the other [under search box]

Add to list/folder management

- need to log in to use - I wouldn't bother with this feature because of this, and it's not as visually appealing as [other discovery service].
- prompted to login – good [give clear indication that items will be kept beyond "session"]

Year
2011 (19)
2010 (29)
2009 (22)
2008 (33)
2007 (39)
2006 (27)
2005 (25)
2004 (20)
2003 (31)
2002 (25)
2001 (20)
2000 (23)
1999 (33)
1998 (21)
1997 (12)
1996 (13)
1995 (14)
1994 (16)

Views ebooks/websites in a new window, but when I searched for UCOL's Library it took me to the UCOL website without warning.

You can do another search whilst on a book details page, but it removes your initial search term (which you entered) – keeping these would be nice.

Permalinks aren't necessary, since can bookmark pages.

Need to open title to get summary of item (4/5, 5="Very Poor"). Would like mouse "roll-over" summary seen on [other discovery service]

Limits good on <http://ocwms.worldcat.org> example

Hard to comment on Library holdings information, when our holdings are not accurate on OCLC example. Can't limit by print or electronic.

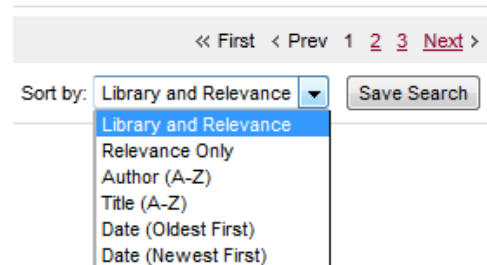
Results Page: Results Ranking

Articles aren't as accurately searched and weighted [using "Libraries Worldwide"].

When there is only one result, the filter column disappears and you are not able to change the filter.

Both similar as far as I can see – difficult to compare results as not using UCOL data for both searches. WorldCat not getting points for this!

Can we sort by library & newest:



OPAC information

Real-time availability: 1 click and then part of list – unclear (4/5). Patchy/bad on OCLC demo site <http://ocwms.worldcat.org>

Needed to be in "All formats" to get to tick books.

Individual item details

Sharing, Printing, Email options: works, needs more detail.

Advanced search should copy your search term and filters that you currently have [from basic search].

Would like "Availability" & "View Now" merged – don't care where it is, just need to know how to get hold of it!

Lots of scrolling to see the extra details at the bottom of the page.

General

Liked the speed compared with [other discovery service]

Languages option is good.

OCLC using APA 6th – correct capitalisation of title, but Month + Day for journal date (January 01, 2006)

Very messy to get back to basic search when side-tracked to Title (etc) search (in <http://ocwms.ucol.ac.nz>)

They have done themselves no favour by not making our data available! [on full site – like <http://ocwms.worldcat.org>]