

Connections

Customer install base/experience

1. **Live Implementations.** How many current customers do you have that have successfully implemented the product at their institutions (i.e. actually made the discovery layer prominently available)?
2. **Additional Commitments.** How many additional customers have committed to the product?
3. **Customer Similarity & References.** UCOL Library is tertiary education library in the New Zealand ITP sector (institutes of technology/polytechs), serving approximately 4500 EFTS. How many of these customers share a similar library profile?
 - a. Can you provide website addresses for live implementations that you feel are suitable representatives for this group?
 - b. Can you provide references (names and contact details), for library and technical staff that you have worked with to implement your discovery solution?
 - c. Do any of your existing customers use Voyager, and can you provide library staff contact details for these sites?

Pricing

4. **Pricing Model.** Describe your pricing model for a library type such as ours, including:
 - a. initial set-up and configuration costs
 - b. ongoing subscription costs
5. **Add-ons.** What optional add-on services or modules do you provide which we should be aware of and that are able to be integrated with your discovery solution (e.g. OpenURL link resolver)? Please also provide pricing details.

Capability

Technical Support

1. **Critical Level Support.** Briefly describe options, (including hours of availability), New Zealand customers have for reporting mission-critical problems, and for reported observed non-mission-critical apparent bugs and glitches.
2. **Optional Consulting.** Briefly describe any consulting services you may provide above and beyond routine support services (e.g. consulting services related to harvesting a unique library resource, which does not have an existing ingest/transform/normalise routine).
3. **Enhancement Suggestions.** What is the process for suggesting potential enhancements for future releases of the product?

Local metadata sources

The UCOL Library catalogue contains records representing items from other repositories, including ClickView, a digital library containing video, audio, and learning objects.

4. **MaRC21 Support.** Please verify that your discovery service has existing connectors and standard ingest/transform/normalise tools or application profiles for MaRC21 UTF-8, and list any additional metadata standards and schema which you also support.
5. **MaRC Data Mapping.** Please provide details of all MaRC data fields, which are required by your discovery service to provide basic bibliographic data and any facets (i.e. specify MaRC fields, subfields and indicators).
6. **Synchronisation of Local Metadata.** For records hosted at the local library, is the process to synchronise record changes, (i.e. updates, modifications, deletions), best described as:
 - € 'Push' (initiated by the local library)
 - € Is there a limit on how often the updates can be processed?
 - € 'Pull' (initiated by the discovery service)
 - € Can the local library trigger an early harvest?
7. **Synchronisation Procedure.** Please describe the process to synchronise local sources of metadata with your discovery service, including new records.
8. **Synchronisation Delay.** What is the typical delay between synchronisation, and when those changes are reflected in the discovery service?
9. **Additional Relevant Information.** Please provide details and documentation of any policies or procedures relating to local resource harvesting, of which the local library should be aware.

10. **Unique Fields/Facets.** To what extent can collections such as ClickView have their own unique fields or data displayed and incorporated as additional facets? Please indicate any additional costs associated with this functionality.
11. **Underlying Schema.** Are both local and remote content normalised to a single schema? If so, please offer comments on how local and remote (publisher or aggregator) content is normalised to this single underlying schema.

Remote connectors

When it is not possible to include content in the central index, remote connectors are often used to allow external content to be included in search results via a federated search.

12. **Remote Connector Development.** Please indicate whether the remote connectors are provided by a 3rd party, or developed in-house.
13. **NZ Remote Connectors.** Please provide a list of remote connectors which exist, and are currently available for New Zealand content providers (including, but not limited to: National Library of New Zealand: Index New Zealand and KnowledgeBasket: Newztext).

OpenURL Resolver Links

We currently use EBSCO LinkSource as our link resolver.

14. **Link Resolver Choice.** Please comment on any implications for link resolution using our current link resolver.
15. **Link Resolver Issues.** Please provide details on any outstanding issues that are known to exist with your discovery service and EBSCO LinkSource.

Remote Access

We currently use EZProxy to facilitate remote access to licensed resources which require IP authentication.

16. **Remote Access Method.** Please comment on any implications for remote access using EZproxy.
17. **Remote Access Issues.** Please provide details on any outstanding issues that are known to exist with your discovery service and EZProxy.
18. **Remote Access Integration.** How well are EZProxy and similar products integrated with your discovery service? Where links are offered as permalinks within the discovery service, and to other sites, can these be added with the EZProxy prefix?

Usage Statistics & Reporting

19. **Usage Tool(s).** Is there a separate administration tool which can be used for usage statistics and reporting? Please describe what you feel are some of the more significant use, management or content related statistics available out of the box with your system.
20. **Report Types.** Are reports available to measure:
 - a. uptake of your discovery service (e.g. sessions, searches, abstract/record views, fulltext)?

- b. discovery of remote resources (e.g. abstract/record views)?
- c. discovery of local metadata (e.g. abstract/record views)?

21. **COUNTER Compliance & Scheduling.** Are these reports COUNTER compliant, and are they able to be scheduled?

Authentication & Rights Management

22. **Unauthenticated Access.** Does your discovery service permit unauthenticated access? Please describe and provide some details about which materials will not be discoverable or visible to unauthenticated users, including:

- € Records that relate to local Library-owned items (e.g. books, journals)
- € Records that relate to content within local Library-owned items (e.g. book chapters, journal articles)
- € Enrichment content for local Library-owned items (e.g. book covers, images, reviews)
- € Records solely sourced from abstract and indexing databases (i.e. that database is the only provider of that specific content within your discovery service.)
- € Citation information for content sourced and compiled from multiple content providers.
 - Please indicate the general level of information available to an unauthenticated user
 - € No bibliographic information
 - € Basic bibliographic information (item title, source title, author, publication information)
 - € Author supplied information:
 - € Subject descriptors
 - € Keywords
 - € Subject descriptors
 - € Keywords
 - € Abstracts
 - € Full Text

23. **Non-licensed Metadata.** Aside from any Library-licensed data from ejournal and database sources, is there a basic level of citation information which is available to all customers of your discovery service?

For example, this may be largely comprised of information from open-access and creative commons sources.

- a. How large is this base index?
- b. Please indicate the general level of non-licensed information available:
 - € No bibliographic information
 - € Basic bibliographic information (item title, source title, author, publication information)
 - € Author supplied information:
 - € Subject descriptors
 - € Keywords
 - € Subject descriptors
 - € Keywords
 - € Abstracts
 - € Full Text
- c. Is this base index data available to on-site unauthenticated access (e.g. walk-in access):
 - € for searching?
 - € for results display?
- d. Is this base index data available to remote unauthenticated access (i.e. off-site access):
 - € for searching?
 - € for results display?

18. **Rights Management.** How does your discovery service determine whether local library users should have access to fulltext resources? Please describe how rights management is initialised and maintained in your discovery service to ascertain access rights.

Content

Centralized Index

General

1. **Periodical Titles.** How many periodical titles are included in the pre-harvested centralised index?
2. **Unique Items.** What is the current count of unique indexed items?
3. **Breakdown - Depth.** Please provide a breakdown of the *depth* of metadata in the centralised index (basic metadata, basic metadata + abstract, full metadata, full metadata + full text, other).
4. **Breakdown - Sources.** Please provide a breakdown of the *sources* of metadata in the centralised index (newspapers, magazine content, conference proceedings, journals, peer-reviewed journals, book content, other).
5. **Content Agreements.** With approximately how many publishers and aggregators have you forged content agreements?
6. **Significant Agreements.** Are there any particular publishers and aggregator agreements that you feel are especially significant for your service? Please provide the following details:
 - a. Vendor name:
 - b. Database/Resource name:
 - c. Agreement:
 - i. expiry dates (if applicable)
 - ii. agreement type (exclusive, etc.)
 - d. Level of bibliographic metadata: [please tick all that apply]
 - € Basic bibliographic information (item title, source title, author, publication information)
 - € Author supplied information:
 - € Subject descriptors
 - € Keywords
 - € Subject descriptors
 - € Keywords
 - € Abstracts
 - € Full Text

1. **Majority Detail.** Can you please provide some detail and comments on the level of metadata provided to you, for indexing purposes, by the majority of the major publishers and aggregators with whom you've forged agreements? Include any relevant comments, and describe to what degree these data elements are provided by these agreements, and play a role:

Basic bibliographic information (item title, source title, author, publication information)

Author supplied information:

Subject descriptors

Keywords

Subject descriptors

Keywords

Abstracts

Full Text

2. **Item Aggregation.** Given the fact that the same content can be provided by multiple sources, please provide some general comments on how records are built within your discovery service. For example:
 - a. You have an agreement with a particular publisher or aggregator that agrees to provide you with rich metadata for its content, perhaps even provide you with indexing it has already done for its content, or provide you with the full text for you to then "deep index" its content.
 - b. You include metadata for content in the central index - regardless of the quality - as it is the only source of that content which is currently available to your discovery service, (this may be due to contractual arrangements, for example).
 - c. For some items appearing within your service, content is available from multiple sources with which you've made agreements. How does your discovery service reconcile various metadata available from multiple sources?
3. **Identical Aggregation.** Please describe your discovery service's approach to deduplicating metadata representing *identical resources* in the central preaggregated index. For example, if the same resource is described differently by a number of sources, does your index display multiple instances of the same title?
4. **Similar Aggregation.** Please describe your discovery service's approach to deduplicating metadata representing *similar resources* in the central preaggregated index. For example, if the same resource is available in different editions and formats, does your index display multiple instances of the same title?

5. **Favoured Format.** Do you feel that there is a particular format type that your discovery services covers very well, or leans heavily towards (scholarly journal content, magazine content, newspapers, conference proceedings, etc)?

Content by Subject, Vendor/Publisher, and Title

7. **Subject.** Please rate how well you feel these particular content/subject areas are covered by your discovery service:

1. Very Good	2. Good	3. Moderate	4. Poor	5. Very Poor
Please use the comments to:				
<ul style="list-style-type: none"> list any steps to improve/augment coverage indicate strong sources of metadata provide pertinent detail to support your rating 				

	Very Good			Very Poor	
	1	2	3	4	5
Arts Glass sculpting, painting, photography <i>Comment:</i>					
Business Business administration <i>Comment:</i>					
Computing/ICT Computer software, hardware, network design <i>Comment:</i>					
Fashion & Beauty Catwalk modelling, cosmetology, hairdressing <i>Comment:</i>					
Computer-based Artwork Animation, video production <i>Comment:</i>					
Health Sciences/Medical Imaging/Nursing <i>Comment:</i>					
Sports Performance/Exercise Science Coaching, Training. <i>Comment:</i>					
Trades and Technology Automotive, carpentry, car panel & paintwork <i>Comment:</i>					

8. **Content Analysis.** Please describe what sort of content analysis you can provide, to compare our library access and holdings with titles covered in your discovery service.
9. **Vendor/Publisher.** The following vendor/publisher databases are considered key – please provide detail on the scope of support for the following:

EBSCO : CINAHL

Agreement:

- i. expiry dates (if applicable)
- ii. agreement type (exclusive, etc.)

Level of bibliographic metadata: [please tick all that apply]

- € Basic bibliographic information (item title, source title, author, publication information)
- € Author supplied information:
 - € Subject descriptors
 - € Keywords
- € Subject descriptors
- € Keywords
- € Abstracts
- € Full Text

Elsevier : ScienceDirect College Edition

Agreement:

- i. expiry dates (if applicable)
- ii. agreement type (exclusive, etc.)

Level of bibliographic metadata: [please tick all that apply]

- € Basic bibliographic information (item title, source title, author, publication information)
- € Author supplied information:
 - € Subject descriptors
 - € Keywords
- € Subject descriptors
- € Keywords
- € Abstracts
- € Full Text

Oxford Art

Agreement:

- i. expiry dates (if applicable)
- ii. agreement type (exclusive, etc.)

Level of bibliographic metadata: [please tick all that apply]

- € Basic bibliographic information (item title, source title, author, publication information)
- € Author supplied information:
 - € Subject descriptors
 - € Keywords
- € Subject descriptors
- € Keywords
- € Abstracts
- € Full Text

STAT!Ref

Agreement:

- i. expiry dates (if applicable)
- ii. agreement type (exclusive, etc.)

Level of bibliographic metadata: [please tick all that apply]

- € Basic bibliographic information (item title, source title, author, publication information)
- € Author supplied information:
 - € Subject descriptors
 - € Keywords
- € Subject descriptors
- € Keywords
- € Abstracts
- € Full Text

10. **Title.** The following titles are considered key – please provide detail on the depth of coverage for these titles:

- Nursing New Zealand - Kai Tiaki

3rd Party Connections

11. **Agreements.** Do you have any other 3rd party agreements with the following? If so, are items included in the pre-harvested centralised index or is it offered as a federated search target?

a. EBSCO: EBSCOhost Research databases	yes	no
Included in the centralised index	yes	no
Level of metadata detail provided/included	<div>Very Good</div> <div>1 2 3 4 5</div>	<div>Very Poor</div>
Federated search target	yes	no
b. OCLC (WorldCat)	yes	no
Included in the centralised index	yes	no
Level of metadata detail provided/included	<div>Very Good</div> <div>1 2 3 4 5</div>	<div>Very Poor</div>
Federated search target	yes	no
c. Google Books	yes	no
Included in the centralised index	yes	no
Level of metadata detail provided/included	<div>Very Good</div> <div>1 2 3 4 5</div>	<div>Very Poor</div>
Federated search target	yes	no
d. Google Scholar	yes	no
Included in the centralised index	yes	no
Level of metadata detail provided/included	<div>Very Good</div> <div>1 2 3 4 5</div>	<div>Very Poor</div>
Federated search target	yes	no
e. Hathi Trust	yes	no
Included in the centralised index	yes	no
Level of metadata detail provided/included	<div>Very Good</div> <div>1 2 3 4 5</div>	<div>Very Poor</div>
Federated search target	yes	no

2. **E-Books.** What support is there for content from e-book vendors? Please list any significant e-book vendors which provide content to the centralised index.

Relevancy Ranking

1. **Relevancy Determination.** Please provide some details or documentation about how your discovery service determines relevance. In general terms, which factors are included, and how are they weighted?
2. **Currency.** How does currency of the item affect relevance? Does currency factor more heavily in certain content types (e.g. newspapers)
3. **Location Collection Visibility.** Briefly describe whether it's possible to manipulate the ranking of local metadata amongst other results, and how this is accomplished.
4. **Local Library Influence.** Is the local library able to influence the relevancy ranking for items from other, non-local collections?
5. **Exposure of Items with Minimal Metadata.** For items with weaker or less rich metadata, how does your discovery service ensure discoverability?
6. **Full-text Searching.** Does your discovery service offer the capability to search the full-text of materials (i.e., is a user searching a full-text keyword index)? If so, what percentage of items within your service are indexed at the full-text level?

Communication

User interface

Facets

1. **Facet Counts.** Does your discovery interface provide faceting of results, including facet counts (i.e. as shown in parentheses in Fig. 1)?
2. **Facet Customisation.** Is the Library able to customise the number/presentation of facets at all? If so, please provide details, including any costs.

Fig. 1



Search/finding aids

3. **'No results found'.** When 'no results' are found for a given search, please describe what is presented to the user.
4. **Finding Aids.** Does your discovery service provide a spell-check/"did you mean" feature?
5. **Options to Refine Searches.** What options are available for searchers to refine results (e.g. date range, formats, peer-reviewed source)?
6. **Finding Aids Labels.** Is the Library able to customise the labels/presentation of these refinements? If so, please provide details, including any costs.
7. **Recommendations.** Does your service include any recommendation tools? If so, please provide details on how these are presented to the user.

Presentation of fulltext availability and links

7. **Fulltext Determination.** Does your discovery service indicate the availability of fulltext?
 - € How is fulltext availability determined?
8. **Permalink Availability.** Please identify whether bookmarks/permalinks are available within the discovery service, (and where they are found), for:
 - € Results pages
 - € Individual resources (i.e. article/item level)
9. **Personalised Facilities.** Does your discovery service offer these personalised facilities to manage and organise search results:
 - € Personal Account Creation
 - € Saved Folders
 - € Export to Bibliographic Management software
 - € Other: (please specify)

OPAC integration

We use Ex Libris' Voyager (version 7.2.3) as our Integrated Library Management System, which provides APIs to access OPAC functions and data.

10. **Real-time Availability.** Please describe whether your discovery platform provides real-time availability of Library-owned, issuable items (books, dvd/videos, etc). Also include any data requirements to provide this functionality.
11. **Serial Holdings.** How are details about Library-owned physical serial holdings presented in your discovery platform?
12. **Other OPAC Services.** Are these traditional OPAC functions integrated/implemented in your discovery platform:
 - a. Requesting/reserving items?
 - b. Renewing loans?
 - c. Viewing Library account information?

Navigation & Customisation

13. **Navigation.** Are any 3rd party, native interfaces used to provide any extra functionality? If so, please describe:
 - a. How the transition to the native interface is managed, (i.e. how is it made obvious to the end-user that they are leaving the discovery interface?)
 - b. How the end-user would navigate back to your discovery interface?
14. **Ability to Customise.** How open is your discovery service to local library customization? For example, please comment on the local library's ability to:
 - a. Rename the service
 - b. Change service branding and colour scheme
 - c. Customise the header and footer hyperlinks
 - d. Customise fonts and/or element spacing on results pages
 - e. Embed the search box in other venues, (e.g. Library home page)
 - f. Create "canned" searches with built in parameters, (e.g. a search box with a predefined full text and peer-reviewed filter)

- g. Incorporate links and direct inline viewing for external enriched content (e.g. Google Books previews; Amazon.com item information)
- h. Incorporate custom widgets into pages of the discovery service, (e.g. “Ask a Librarian” on search page, and results page)
- i. Any ability to create native widgets using bibliographic data exposed by your discovery service, including which data fields are available for widget use, (please provide any links or documentation which is provided for assist creation of native widgets)
- j. Create custom RSS feeds for a search