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Implementing Discovery at the University of North Alabama

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Background

Collier Library, the main library at the University of North Alabama (UNA), provides the campus community with access to over 150 electronic resources. With so many available options, our students often overlook valuable databases. Analysis of usage statistics had shown that some of our most expensive databases had the highest cost per retrieval. Therefore, finding a product that would encourage users to utilize the full range of available databases became a top priority. In the summer of 2010, the Collier Library staff began to seriously investigate the discovery tool marketplace. We felt that the “single search box” concept of discovery tools and their ability to allow users to seamlessly search multiple databases would be the ideal way to expose students to the range of available databases. We believed that this exposure would increase database use and thus decrease the cost per use. Following discussion and review, the library licensed EBSCO’s Discovery Service (EDS) in late 2010. After months of preparation, setup, and testing, the library launched EDS in spring 2011.

Choosing a Vendor

There were several vendors offering discovery tools when we began exploring the market. As we considered the available products (Summon, Primo, etc.), we focused on certain criteria, such as cost, platform ease of use, and percentage of our databases that could be searched within the product. After receiving quotes from several vendors, viewing online webinars, and attending live demonstrations, we selected EBSCO’s EDS. Our familiarity and comfort with the EBSCOhost interface and the percentage of our resources that would be searchable or included in full-text were the driving factors behind our decision. Since our librarians and users have demonstrated a preference for the EBSCO interface, we already had numerous third-party databases (PsycINFO, MLA, etc.) on the EBSCO platform. This meant that we would be able to search these products within EDS. In addition, our full-text EBSCO periodical databases and electronic books could be easily integrated. An analysis of the indexing in our implementation of EDS revealed that metadata for over 90% of the content in our non-EBSCO databases would be available through EDS. EBSCO’s link resolver, LinkSource, would allow users to easily navigate from the metadata to the full-text available on other database platforms (Gale, ProQuest, etc.). Additionally, EBSCO, unlike some of the other vendors, offered the option to federate databases that could not be included in the “foundation” index. Since the federated databases are

searched using Z39.50 connections, there is a much slower response time for the resulting citations. Because of this, the results are not displayed by default. Users can choose to view these “additional resources” with a click.

Implementation

Implementation was relatively easy from our standpoint. Initially, we supplied EBSCO with a list of our subscribed databases and completed forms related to catalog records and desired customizations. Our systems librarian worked with EBSCO to determine how best to handle the data extracts from our catalog. Based on our list of subscribed databases, EBSCO completed a resource analysis. This document provided information about the degree to which EDS covered the content in each of the databases. It also gave recommendations on which content could be covered by MARC records in our catalog, which might need to be federated, and which was likely inappropriate for EDS. From this analysis, we found that metadata for the information in most of our databases was adequately covered in EDS. We chose to federate fewer than ten databases. About six weeks after submitting the required information, EBSCO had our EDS up and running, with the exception of the federated search connectors. It took a few more weeks to get those ready. A minor stumbling block arose with our off-campus access. It took several weeks to get this issue resolved. Once that was complete, we entered a testing phase.

Testing and Fine-tuning

After setup was complete, the library began an extended testing period during which the product was advertised to our users as a “beta version.” During this phase, we sent campus-wide emails announcing the service to the university community and promoted the product as a “new service” in person and online. Librarians used departmental contacts to publicize the service to faculty. We provided a feedback form for interested users to offer comments on the service. Comments received were overwhelmingly positive. However, because of the limited response, we sought other avenues for user input.

We conducted a focus group session made up of student writing consultants from the University's Center for Writing Excellence. As an incentive to attend this session, we provided pizza and soda. After a brief overview of the product, we asked the consultants to explore the product and offer feedback. Based upon their input, we made small tweaks in the administration module to some of the EDS limiters. Some of the focus group’s suggestions could not

be implemented using the administration module; we forwarded those we felt would be most beneficial to the vendor for their consideration.

In fall 2011, we removed the “beta” label from the product, officially launching it as “Discovery.” We advertised availability of the service during the library’s Welcome Week event and in other promotional materials.

Library Instruction & Discovery

Incorporating Discovery into the library instruction program required careful thought. We began the process by having formal and informal meetings to discuss integrating Discovery into library instruction sessions. The librarians realized there were a number of advantages to including Discovery in library instruction. For us, the biggest advantages were its ability to simultaneously search, through one interface, the library’s catalog and most of our subscription databases. This provides a good starting point for students unfamiliar with the wide variety of resources available. We also felt Discovery would help with the promotion of under-utilized resources and library services, such as Interlibrary Loan and Ask-a-Librarian.

One of the first topics discussed was how to teach Discovery, especially as it related to our information literacy goals for different levels of library instruction sessions. We recognized that in many ways Discovery is like other databases and can be used to teach the same concepts and that the “Google-like” one search box interface would appeal to students.

However, like other researchers (Fagan, 2011; Fagan, 2012; Fagan, Mandernach, Nelson, Paulo, & Saunders, 2012; Fawley & Krysak, 2012), we have found that while discovery tools work well for gaining a broad overview of sources across disciplines, many of the advanced search features and limiters of discipline specific databases are not available. For example, Discovery does not have the “age group” or “population group” limiters that are available in databases such as CINAHL and PsycINFO. In addition, for the limiters that are available in Discovery, (e.g. “language”) if the field doesn’t exist in the metadata for a specific database, citations from this database will not be included in results list. This meant that potentially relevant results would not be retrieved and our concern was that upper-level students, who needed to be familiar with discipline specific databases and search techniques, would not intuitively know to dig deeper and explore individual discipline specific databases.

In deciding how to integrate Discovery into library instruction, we also considered the nature of our instruction program. The majority of our library instruction sessions are one-shot sessions for first and second semester freshman composition courses, so it made sense to begin with these classes. However, our teaching faculty had come to expect that certain resources and services would be covered in each of these sessions. Adding a new element to the traditional sessions required removing some of the

topics previously covered or teaching them in a different way.

Many of the introductory composition classes come for library instruction early in the semester before they have a research or library-related assignment. At that point, students are still in the process of adapting to college life and often “tune out” or forget the concepts presented in library sessions because they have no immediate need for the information. The goal of these instruction sessions is to introduce students to the library, without overwhelming them with information. The library session given for the subsequent semester composition class is designed to build upon the first semester experience. This second session is timed to coincide with a research paper project. Students have selected topics, usually for argumentative papers, and they must find a variety of sources to support or oppose their argument. We considered Discovery a logical fit for this project.

In the end, we decided that instruction librarians would briefly introduce Discovery, along with other general databases, in the introductory freshman composition session and deliver more in-depth presentation in the second semester freshman composition course. We designed a hands-on, librarian-guided activity to be completed in the second semester sessions. This activity reinforces information literacy skills that focus on recognizing the wide variety of information sources, distinguishing between formats and audience of potential source, and retrieving information. Since its introduction, the teaching faculty have embraced Discovery and responded favorably to changes in instruction. We also considered how Discovery correlated with the “Standards, Performance Indicators, and Outcomes” of ACRL’s Information Literacy Competency Standards for Higher Education as they are currently written. NOTE: The ACRL Information Literacy Competency *Standards* Review Task Force made a recommendation to the ACRL Information Literacy *Standards* Committee in ACRL AC12 Doc 13.1 that the *Standards* “should not be reappraised as they exist but should be extensively revised.” (ACRL AC12 Doc 13.1, p1.) Once the new version of the *Standards* is approved we will re-evaluate our approach.

When reviewing the standards, we discussed how Discovery could be used to teach or illustrate selected performance indicators and outcomes, as they related to our goals and objectives for freshman composition courses where Discovery would be taught.

For the first and second semester freshman composition courses our main focus had always been on selected outcomes for Standards One and Two, so it was logical to examine these standards as they related to Discovery. These two Standards deal with recognizing an information need and accessing information. After much discussion, we decided that Discovery could best be used to demonstrate Standard One outcomes that focused on finding a wide variety of potential sources (databases), identifying the various formats (books, articles, videos, etc...), recognizing the differences in audience (popular, scholarly, etc...), and

obtaining sources (availability) (1.2c, 1.2d, and 1.3a). Discovery facilitates this in a number of ways. There are facets that allow users to filter by source database and source type, as well as icons that indicate source type. There are also links that guide users through the process of checking for availability of sources.

For Standard Two, outcomes dealing with identifying keywords, developing a search strategy, and retrieving needed information (2.2b, 2.2d, and 2.3c) were taught. Additional keywords can be identified in Discovery through the use of the “subject terms” facet. These terms can be added to the search string by checking a box beside the desired term(s). Through full-text links and links to check for the availability of an item in the catalog or other databases, users can quickly determine if an article is readily accessible or will require submission of an ILL request. Our link resolver helps simplify this process by searching other databases to find out if the article is available, and if it is unavailable, linking to an ILL form that has been pre-populated with citation information.

While we focus on teaching Discovery primarily in traditional one-shot library instruction sessions for freshman, we also use Discovery to enhance the overall course experience for upper-level students through our embedded librarian service, an extension of the library instruction program. This program, which began in summer 2007, has grown steadily over the past few years, with a number of teaching faculty incorporating more library related assignments and meetings with librarians into their courses. Many of the upper-level classes that include embedded librarians require students to work together on semester-long, collaborative research projects. These student groups often meet with their class librarian multiple times throughout the semester and they needed a tool for tracking and sharing sources. The personalized EBSCO account feature is an invaluable tool for these students. It offers students the ability to set up personal accounts in Discovery, use folder options to save citations and searches, and share folder content with others. Because Discovery includes indexing coverage for most of our none-EBSCO databases, citations from these databases can be saved in the personalized accounts and shared. In some cases, this eliminates the need for additional personal accounts on other database platforms.

Post Implementation Workflows

To ensure that the library’s physical holdings are relatively up-to-date, we extract changed catalog records every Friday and FTP this data to the EDS vendor. We also periodically do a full extract to replace the data on file with EBSCO. Quality control is necessary to ensure that the catalog extracts are capturing all appropriate records. We periodically spot check Discovery to ensure that new records are included, especially when we have used bulk import to add records for a new electronic resource. Several months after adding a new electronic book collection, we discovered that the MARC records for a new set of electronic records did not get sent to EBSCO with the regularly scheduled update file. We were unable to

pinpoint the exact cause of this problem. After this, we made the decision to periodically conduct a full extract.

One issue that impacts both cataloging and systems is the loading of MARC records for electronic resources. We now have to think about how database content will be accessed in Discovery. If metadata for the information is already included in Discovery, one consideration is how to exclude the MARC records from our catalog extract to avoid duplication. In the past, we did not always add MARC records for all of the items within a database (e.g., individual streaming videos). To ensure these resources are included in Discovery, we must continually evaluate past practices.

Several months after we officially launched Discovery, we noticed an issue with usage data from one of our vendors. We initially believed that there was a problem with the vendor’s system. After working with appropriate support staff, we determined that the numbers were inflated because of the way the EDS federation works. Because of this, we are no longer using the session and search data for some vendors; instead, we are focusing on the article retrieval statistics. This incidence also triggered reconsideration of the usage statistics that we collect for our EBSCO databases. As all of our subscribed EBSCO databases are included in Discovery, choosing how to report the search and session statistics required attention. Based upon information from selected webinars and the EDS listserv, we revised our EBSCO statistics practices. We now collect session and search data only for the “publisher provided” index. For other EBSCO resources, we collect article retrievals.

Administering Discovery is more time intensive than administering our other databases. In addition to the usual interface customizations such as choosing labels for various limiters and choosing which limiters to display, etc., which are usually done immediately after subscription and tweaked occasionally, EDS requires ongoing administration. As new electronic products are offered, we now have to do the customizations for the native interface and then consider if and how we can include the resource in Discovery.

EBSCO periodically adds new free content to EDS. Initially, we encountered problems because the vendor automatically added this content to our default EDS profile. While we want to provide some of these resources to our users, not all are appropriate for our needs. For example, some of the content is in languages other than English. As there was not always notification that new free content had been added, we found that we had to monitor Discovery closely to ensure that no new databases had been added. We have worked with the vendor to resolve this issue. We have made the default EDS profile a test profile to which EBSCO can add these new, free resources. We created a separate “live” profile that we promote to users.

When non-EBSCO resources are added, we ask EBSCO to add them to our EDS test profile. Then, we test each to ensure it is working properly. Finally, we add the new

resources to the relevant EDS profiles. As we have created multiple subject-specific EDS search profiles, we must ensure that new databases are added to all appropriate profiles after testing.

In addition to the ongoing maintenance tasks associated with the interface, there is a need to monitor the EDS listserv to determine if any new features/resources have become available. There may also be a need to tweak the interface as feedback is received from faculty and students. We are still working to determine the individuals within our library to be responsible for each of these tasks.

Future Plans

As Fagan pointed out in a recent *Journal of Web Librarianship* editorial, many librarians have a tendency to think that their discovery tool is the “biggest and/or best” (2012). While we are very happy with EDS, we continue to monitor the marketplace going forward. We are currently investigating next generation ILS products. As we talk with

vendors, each is pushing the benefits of using a combination of their ILS and discovery product. While most say that their ILS will work with other discovery tools, they are quick to point out that it will work better with their own discovery product. In many cases, access to features such as saved lists is not yet available through other vendors’ discovery tools. We currently have that problem with *Discovery*. For users to perform tasks tied to their “library” account (place holds, renew books, etc.), they must go to the OPAC. While we are not interested in changing vendors, we recognize the possibility exists that it could one day become necessary to do so. This is one of the reasons that we chose to brand our product simply “Discovery.” We did not want to include a vendor name in the tool because we recognize that at some point our needs might change. Given the positive response to *Discovery*, we appreciate that our users will continue to expect the features available through discovery products. Whatever the future holds, we are committed to meeting these expectations.

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