

Rediscover Discovery – Evaluating Web-Scale Discovery Platforms

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Our History on Discovery

- * Installed LibraryFind from 2007 to 2009
- * Launched Encore and Research Pro in 2008-2009
- * Implemented Summon in 2010
- * Next step - evaluating discovery platforms



Image source: <http://msrworkshop.tumblr.com/>

Discovery Systems Working Group

Purpose & Charge

This working group includes representatives from UH campus libraries that are charged with coordinating data exchange between discovery system vendors and the shared Integrated Library System (ILS). It should keep abreast of discovery system initiatives at other libraries and library systems in the region.

The task force should help inform discussions on resource discovery solutions and enhancements that are desirable and appropriate for UH System libraries.

Membership

Committee members are appointed for two year terms. To stagger terms in FY 13 some members will be appointed for a one year term.

Richard Guajardo (chair), UH (term ends August 31, 2014)

Mon Yin Lung, LAW (term ends August 31, 2014)

Yuxin Li, LAW (term ends August 31, 2013)

Jeannie Castro, UH (term ends August 31, 2013)

Beth German, UH (one-year term ends August 31, 2013)

Annie Wu, UH, (term ends August 31, 2013)

Alex Simons, UH (term ends August 31, 2014)

Michele Reilly, UH, (term ends August 31, 2014)

Martha Hood, UHCL (term ends August 31, 2013)

Shannon Burke, UHCL (term ends August 31, 2014)

Karen Berrish, UHCL (term ends August 31, 2014)

Ali Van Doren, UHD (one-year term ends August 31, 2013)

Sam Rogers, UHD (term ends August 31, 2013)

Steven Ring, UHD (term ends August 31, 2014)

Evaluation Process

Discovery System Evaluation Process:

- * Vendor technical demos
- * Q & A with vendors, followed by written responses
- * Ranking and weighing formula for vendor responses
- * Usability study
- * Surveys on public services point of view
- * Open forum discussion with survey for thoughts on next steps
- * Public Services hands-on review of platforms

Rediscover Discovery Day Camp



- * Keynote
- * Panel discussion
- * Vendor general demo with Q&A
- * Round table breakout discussion sessions
- * Other discovery system options

Friday, October 19, 2012 9:00am - 4:00pm

Elizabeth D. Rockwell Pavilion, M.D. Anderson Library

Event Tag: #ddc2

<http://lws.lib.uh.edu/sites/ddc2>

Major Web Scale Discovery Systems



ExLibris **Primo**



Vendor Profile – EDS (EBSCO)

- * Represents content from approximately 20,000 providers in addition to metadata from another 70,000 book publishers.
- * Works with customers to adapt relevancy ranking as desired.
- * Supports harvesting to digitized collections from any OAI-PMH compliant source.
- * De-dup the multiple instances of the same record and display the one with the most information in search results.
- * Offers browser-based mobile interface as well as iOS and Android apps.

Vendor Profile – Primo

- * Includes over 100,000 journal titles and over 500 million scholarly resources in Primo Central.
- * Allows for extremely granular tweaking of relevancy ranking - utilizes ScholarRank for relevance calculating, article recommendation, Hot Articles.
- * Can harvest any record in XML or MARC. Libraries can define their bibliographic mapping.
- * De-duplicates results, then clusters into a single group that offers access to all versions.
- * Offers browser-based mobile interface.

Vendor Profile - Summon

- * Represents over 9,000+ publishers with a largely de-duplicated record count of over 930 million Summon records
- * Notable for their practice of pre-harvesting all content into a single unified index.
- * Relevancy ranking algorithm is entirely controlled by Summon platform.
- * Can harvest any OAI-PMH compliant collection as well as records in CSV, XML, MARC21, Dublin Core, web accessible pdf.
- * Mobile interface is browser based and is included by default.

Vendor Profile – WorldCat Local

- * Offers access to more than 983 million items across a wide variety of formats.
- * Relevancy is based on term frequency, proximity, recentness, how widely held. Locally held items are pushed to the top of results.
- * Can upload collections from CONTENTdm and other OAI-PMH through the OCLC Digital Collection Gateway.
- * The most-held record is displayed for items not held locally. For article records, the record with richest metadata is displayed.
- * Browser-based mobile interface is optimized for hand-held devices with /m at end of URL.

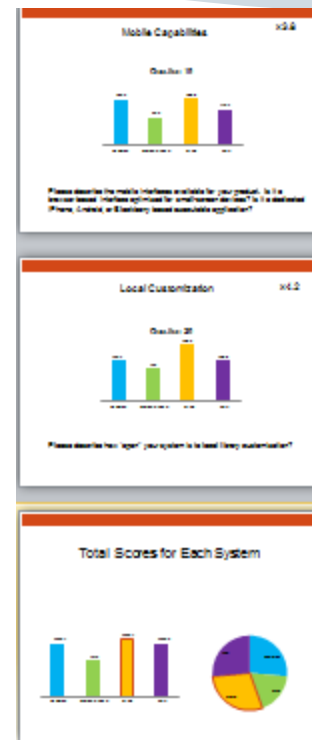
Systems Functionality

Systems Functionality and Implementation Requirements:

- * Integration with the OPAC
- * Metadata schemas & cross walking
- * Harvesting capabilities of library holdings
- * Discoverability of content not licensed by the vendor
- * Integration with ERM and Link Resolver
- * Local customization capabilities

Reference and Instruction Perspective

- * Feedback on current system - Serials Solutions Summon
- * Public Services survey on discovery
- * Hands-on testing of the four major discovery systems



Reference and Instruction Perspective

- * There is no perfect system
- * Embedded help features
- * Direct link to ILL and other options (WorldCat, Amazon etc.)
- * Clearer icons and better display of material types
- * Personal account
- * Customizable interface
- * Other widgets that are helpful to users

User Interaction on Discovery Systems

Usability Study Group:

- * Literature review on usability of discovery system
- * Survey on OPAC usage and its implications for discovery
- * Focus group feedback on current discovery platform



Image source: uneekgrafix.com

User Interaction on Discovery System

Findings:

- * There are little to no distinguishable differences between the discovery systems in terms of their usability.
- * Users are generally satisfied with searching within different library systems, but are confused about the distinctions between systems.
- * Users find discovery to be an important part of their research process.



Image Source: www.library.drexel.edu

Ideal Discovery System

- Good Link Resolving - 3
- Embedded Help - 3
- Relevant results - 3
- Icons identifying material types - 2
- Seamless ILL integration - 2
- Personal Accounts - 1
- Facets for databases - 1



Evaluation Summary

Areas for Evaluation:

- * Systems functionality and implementation requirements
- * User interaction
- * Reference and instruction



Thank You!

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