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Resource Discovery in a Changing Content World

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Allen Jones, Cynthia R. Schwarz, Hannah McKelvey, Rachelle McLain, and Christine Stohn, "Resource Discovery in a Changing Content World" (2019). *Proceedings of the Charleston Library Conference.*
http://dx.doi.org/10.5703/1288284317157

Resource Discovery in a Changing Content World

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Abstract

Discovery services have evolved to include not just books and articles, but databases, website content, research guides, digital and audiovisual collections, and unique local collections that are all important for their users to be able to find. Search and ranking remain at the core of discovery, but advanced tools such as recommendation, virtual browse, "look inside," and the use of artificial intelligence are also becoming more prevalent. This group of panelists discussed how content in their discovery systems can change based on the context of the user, using as examples Primo and Blacklight, and how content is populated, discovered, and requested by users through differing customizations and workflows. The session also explored what tools are available today or may become available in the coming years that may be used to highlight different collections and material types in a library discovery system. As this topic impacts many stakeholders—libraries who need to make content discoverable and satisfy the needs of their users, content providers who want to make sure that their content is visible and used, and discovery providers who need to develop their systems to support changing needs—the panelists posed questions to the audience to encourage conversation around the challenges they face with making their unique content collections discoverable and to share solutions.

Introduction

Discovery services have evolved in recent years. They are no longer limited to just books and articles, but now often include databases, website content, research guides, digital and audiovisual collections, and unique local collections that are important to our patrons. Search and ranking remain at the core of discovery. However, advanced tools, such as recommendation, virtual browse, and artificial intelligence are also becoming more prevalent. This panel session discussed how content in varying discovery systems can change based on the context of the user. Using Primo and Blacklight as particular examples, panelists explained how the content is populated, discovered, and requested by users through different customizations and workflows. They also looked at the tools that are available today and may be available in the future to highlight different collections and materials in a discovery system. As this topic impacts many stakeholders, panelists also looked to the audience to share challenges and solutions they face in making unique content collections discoverable. In this discussion, panelists from three academic libraries shared integrations and features they use in their discovery layers. A panelist from Ex Libris also spoke to the many shapes and forms of discovery and discussed various integrations and other work being done by Ex Libris to continue to improve discovery.

To help frame the discussion, the discovery layer, integrated library system, and the size of each school was provided. Temple University utilizes Alma ILS, Blacklight Discovery built on Solr indexing, the Primo Central Index, and the Alma API. Temple also has the biggest discovery team of the three schools with 2 full-time developers, 1 infrastructure engineer (50%), 1 project manager (50%), 1 e-resources librarian (20%), 1 metadata specialist (20%), and 1 systems administrator (20%). Montana State University Library utilizes Alma, Primo, and the Primo Central Index; they have the following staff who support discovery services: 1 electronic resources librarian, 1 developer (50%), 1 e-books manager (50%), 1 serials manager (50%), 1 systems administrator, 1 integrations engineer, and 3 metadata

technicians. It is important to note that while MSU Library has staff with varying expertise, they do not have a designated discovery team beyond the Electronic Resources and Discovery Services librarian who coordinates efforts in this area as needed. New School utilizes Aleph, Primo, and the Primo Central Index; New School has the smallest discovery team, consisting of 1 e-resources manager, 1 tech services manager, and 1 director/developer.

In the following sections, each panelist provides an overview of discovery at their institutions including what resources are available in the discovery layers, what advanced tools they provide their users, and any discovery challenges. Christine Stohn of Ex Libris concludes this section by discussing collection discovery in the Primo interface.

New School

At the New School, the Ex Libris Primo interface and the customization it allows is a key component of the library's discovery strategy, but it is not the only component. We include the harvesting of e-journal holdings via Google Scholar and sitemap harvesting via Google as part of the overall discovery plan. While other institutions have created bento boxes to send patrons to services with the right materials, the New School has been taking the approach of trying to centralize its search applications into a single tool.

Additionally, the philosophy behind the New School's discovery strategy is not just about exposing what the library owns, but electronic and print materials that patrons might request. It has been found that over 40% of the library's collection budget was spent toward course reserves support and a similar amount was spent on patron-driven acquisitions. In order to support those services, the presentation showed a service that made requests for items from the discovery service to the course reserves system (Figure 1).

A second demonstration showed a IIIF viewer to highlight the importance of media engagement within the discovery service instead of sending users out to other display services or systems (Figure 2). The idea behind including players within the discovery service was to encourage engagement with media rather than opening windows with direct links to new applications. Demonstrations showed similar functionality at the National Gallery of Art. The idea was to encourage immersion and media engagement without changing the frame of the discovery service by traveling to another site.

A third demonstration displayed a widget that allowed users to submit a consortial borrowing request to EZBorrow, a PALCI-based lending network, directly from the discovery service (Figure 3). Jones reported that while convenient, this widget
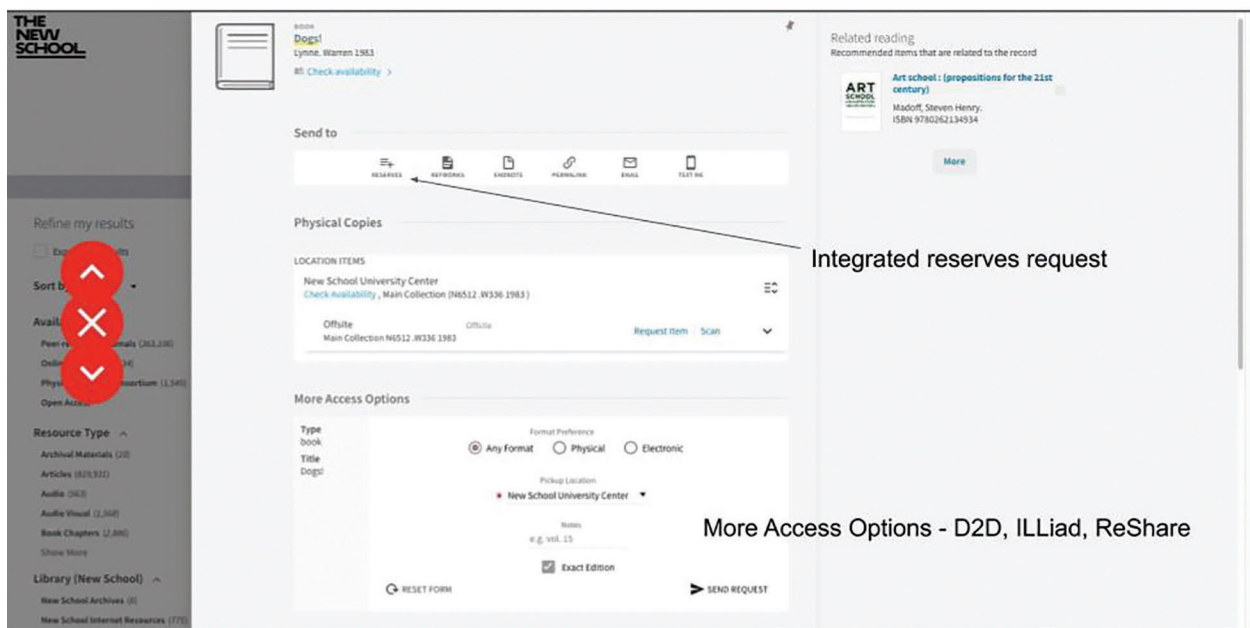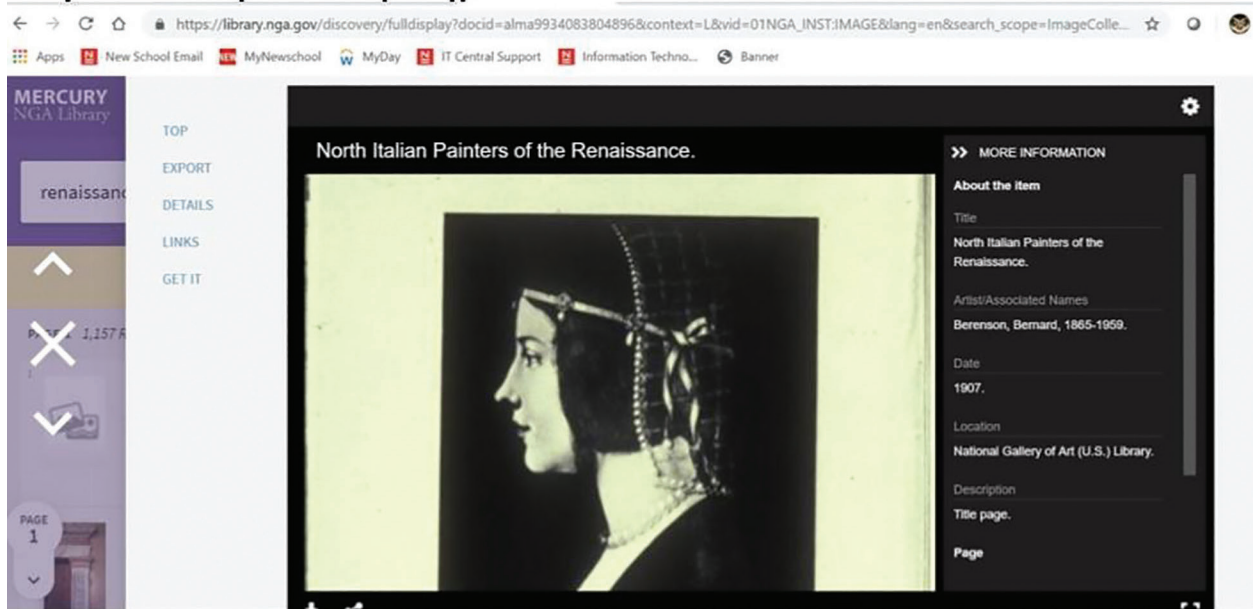

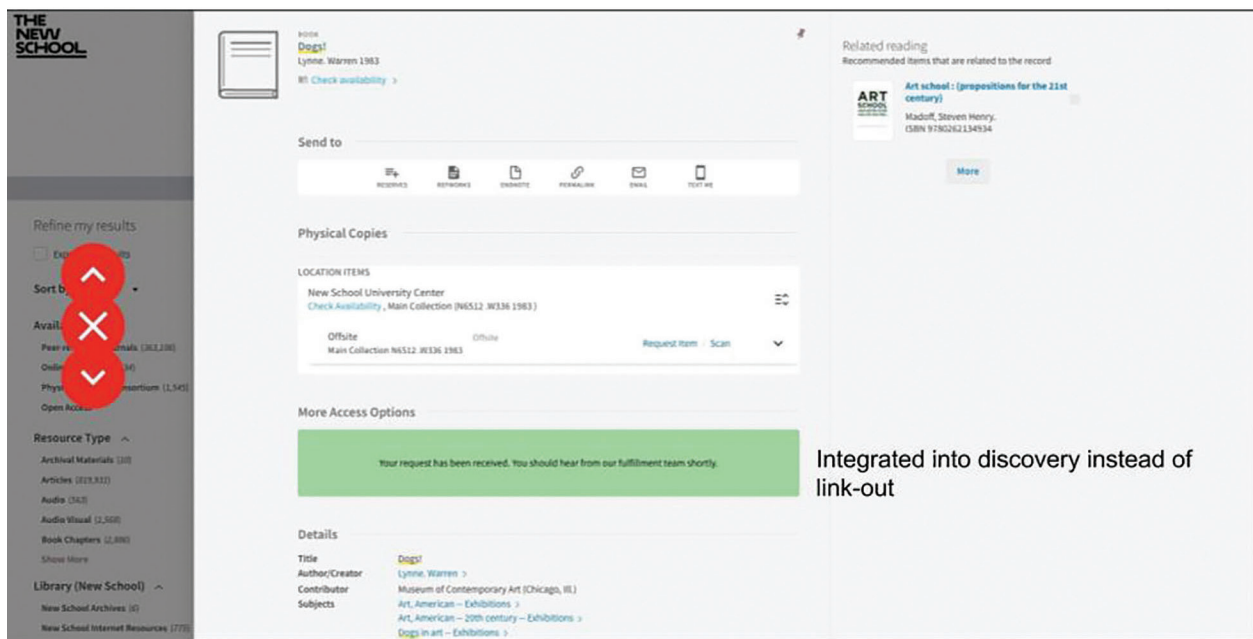Figure 1. The New School—Integrated reserves request.

Figure 2. The New School—Integrated IIIF picture viewer.

Integrated into discovery instead of link-out

Figure 3. The New School—Integrated access options.

increased borrowing requests 130% from the previous year. Such easy requesting created problems in that patrons did not have appropriate information to differentiate titles or make an informed decision about what to request. When they would go to pick up items at the circulation desk, many patrons would leaf through items only to find the item was not what they were hoping it was. Having virtual services

to aid in disambiguation, such as "look inside" features, might assist in better decision-making at the point of request. Using this example, he argued that publisher-provided metadata was essential for an immersive, productive user experience.

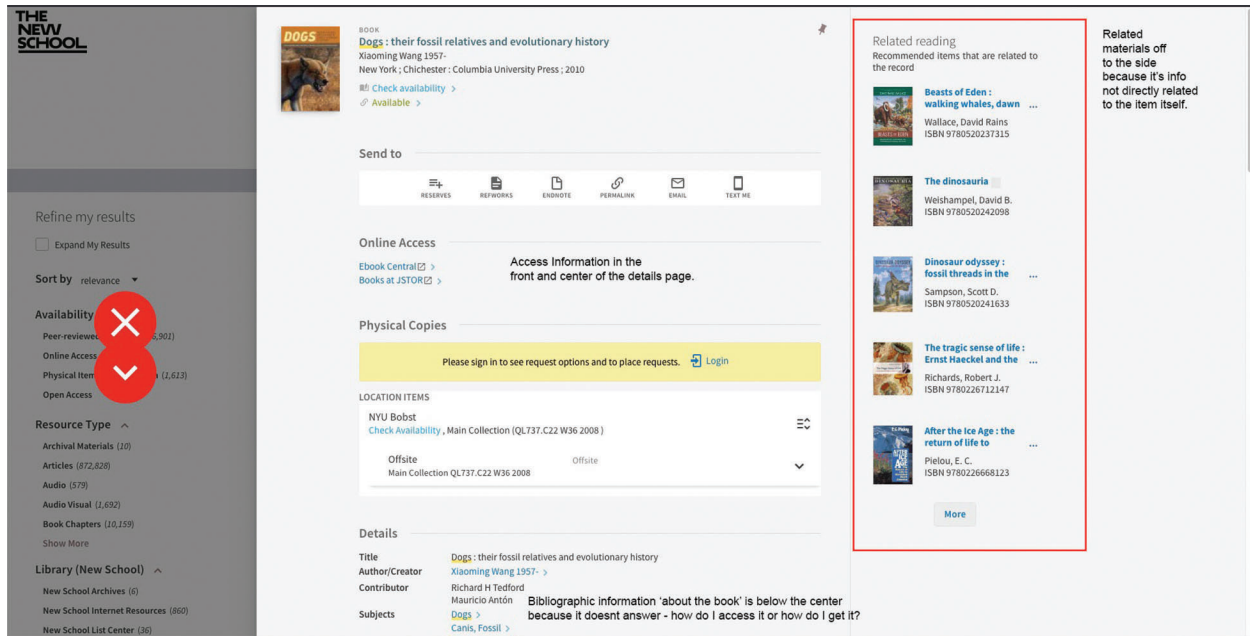A final demonstration displayed "related" data services such as chapter links, "more like these,"

Figure 4. The New School—Related data services.

"people who looked at this also looked at these," and award winners (Figure 4). These types of tangential data feeds are becoming increasingly popular in providing user experiences that patrons were already used to in commercial discovery services (Amazon, Google, Barnes and Noble, etc.). By enabling users to oscillate between discovery content about the item (or even the item itself) in the center and related information on the side, it is hoped that users will feel a more immersive experience and feel encouraged to engage other areas of the interface.

In conclusion, Jones advocated for better metadata and inclusion into central discovery indexes over expenditures in publisher-based search tools. He voiced concern about abstract and indexing content behind paywalls, not just for its impact in discoverability, but for its impact in these relation-based data services and their impact on scholarly communication. He urged publishers in attendance to comply with the open discovery initiative's conformance templates and invest more heavily in metadata production to assist in better "findability" of scholarly communication for research and discovery purposes.

Temple University

Temple University Libraries (TUL) uses a custom-built discovery layer built with a front-end display in Blacklight and underlying Solr indices. Content

is indexed from Ex Libris's Alma, the Primo Central Index, also provided by Ex Libris, a Databases A–Z list maintained in LibGuides, and results from the library's main website (Figure 5). The search results bento also links to relevant results in CONTENTdm, though these are not indexed in Solr at the moment. In the coming year, plans are forming to index and display relevant LibGuides in the search results. Plans are also in the works for the implementation of a browse feature.

Temple made the decision to go with a custom-built discovery layer because of the flexibility that it allowed for integrating other resources and making custom modifications to the request feature. Granular control over the request feature was especially important as TUL planned and executed a move to a new library in the summer of 2019. This new library includes an automated storage and retrieval system known as the BookBot, in addition to traditional open stacks. The development team crafted a custom request feature for retrieving things from the BookBot (Figure 6). They also added helper text to various locations to guide patrons on how to access both the open stacks and BookBot items in the new library.

The move from one library to the other took the entire summer of 2019. During this time, the collection was unavailable to patrons. The development

Library Search

architecture   🔍   Advanced Search   Bookmarks (0)   Log Out

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📖 Books & Media

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New York : Monacelli Press, 2007.
📖 Book

Architecture beyond architecture : creativity and social transformations in Islamic cultures : the 1995 Aga Khan Award for Arch...
London : Academy Editions ; Lanham, Md. : Distributed to the trade in the U.S.A. by National Book Network, 1995.
📖 Book

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Curl, James Stevens, 1937-
Oxford [England] ; New York : Oxford University Press, 2006.
📖 Book

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📖 Reference Entry
`Online`

Architecture
Kimmel, Seth
Journal of Medieval Iberian Studies, 01 September 2013, Vol.5(2), pp.134-138
📖 Journal Article
`Online`

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De Raedt, Nele; Sgarbi, Marco
Encyclopedia of renaissance philosophy, 2016
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Art & Architecture Thesaurus

Art & Architecture Source (formerly Art Source)

Avery Index to Architectural Periodicals

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📖 Journals

Architecture : the AIA journal.
[Washington, D.C.] : [American Institute of Architects], [c1983-2006]

The Dictionary of architecture / issued by the Architectural Publication Society.
London : T. Richards, [1892]

Architecture : the AIA journal.
[Washington, D.C.] : [American Institute of Architects], [1983-2006]
`Online`

View all 1,656 journals >

View all 1,330 online journals >

🌐 Website

C. William Fox Architectural Slide Photograph Collection
Type: Finding Aids

Lam Building Company Architectural Blueprints Collection
Type: Finding Aids

Andrea Goldstein
Type: person

View all website results >

Figure 5. Temple University bento box search results.

team was able to modify the request feature as parts of the collection were available or unavailable during the move process.

Montana State

Montana State University (MSU) Library uses Ex Libris's Primo as its discovery interface and has more traditional customizations as opposed to New School and Temple. While MSU Library did consider implementing a bento box, based on user studies, they found it was not a necessary addition to their search interface. MSU Library surfaces the majority of their electronic resources (e-books, articles and journals, streaming media, and more), local and consortia print holdings, LibGuides, institutional repository, technology checkouts (laptops, cameras, etc.) in their discovery layer (Figure 7). At this time, they are also utilizing the Primo Resource Recommender;

however, due to the amount of upkeep and lack of use, they plan to turn it off.

Another integration MSU Library highlighted during their presentation was their trial to Browzine and LibKey discovery, a suite of products intended to standardize and normalize the experience of searching multiple publisher websites when accessing an article or journal. MSU Library is trialing this to address the frustrations students often experience when having to click multiple links to get to a PDF. Their trial began at the end of August and goes through December. At the time of this presentation, MSU Library expressed satisfaction with BrowZine—during the month of October, they noted 6,443 full-text downloads through BrowZine.

MSU Library noted a current discovery challenge they are encountering with their print periodicals.
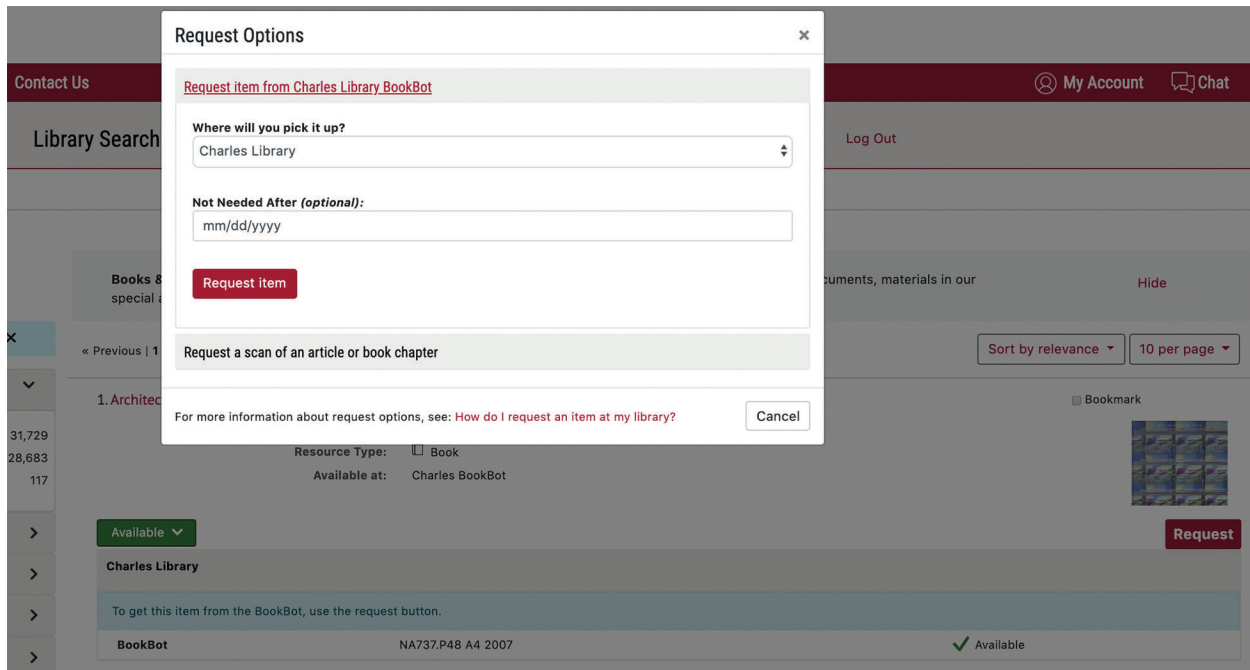
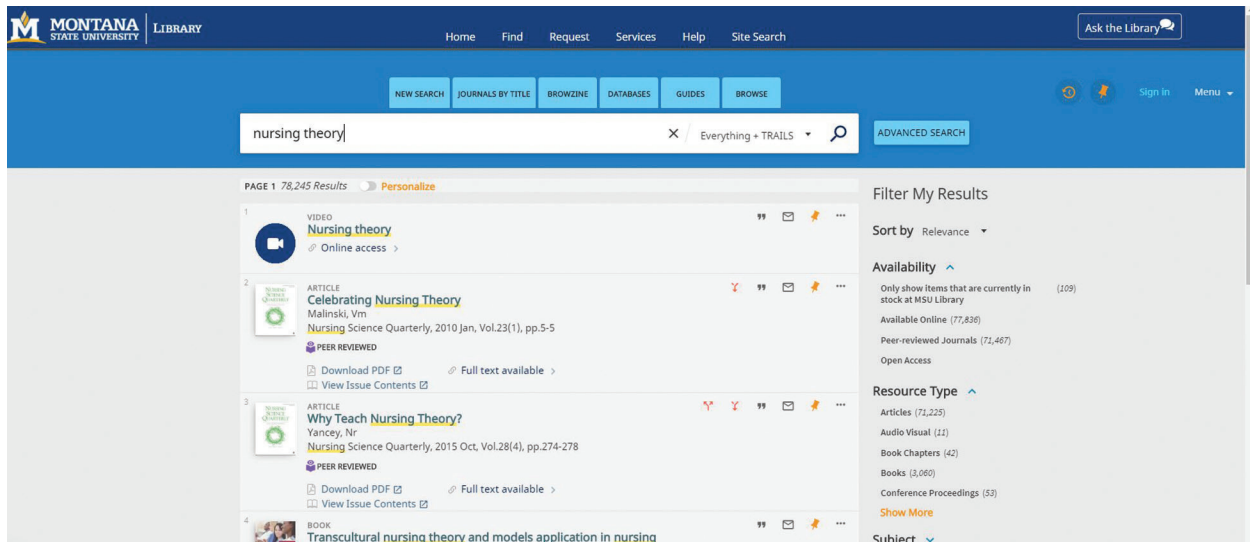**Figure 6. Temple University—BookBot requests.**

Figure 7. MSU Primo Search Results.

During spring and summer 2018, MSU Library underwent a large project to move the majority of their print periodicals to an offsite location. Historically, the cataloging practice at MSU Library was to create only summary holdings for serials. As a result of this, many of their serials do not have barcodes and are not discoverable in the library's catalog. This means patrons are unable to place hold requests on specific volumes, causing a hassle for library staff when it comes to fulfilling the request.

A second issue that MSU Library discussed are the mysterious, and often misunderstood, behaviors of consortial print holdings that surface in their Primo. For the most part, surfacing holdings from other Montana academic libraries in their main Primo search scope has been very positive. However, during this presentation they pointed out examples of issues they have recently encountered. For example, the "course icon" in Primo surfaced in all schools' Primos whether the item was on reserve at that location or

not. This issue has caused some confusion for their patrons. Additionally, the concept of normalization rules is another confusing layer of discovery. MSU Library is continually trying to understand how Alma Network Zone records interact with Primo and develop consortia-wide best practices. At this time, many problems that arise are resolved and discussed on a case-by-case basis. As the nature of discovery continues to change, and more and more content is added to the discovery layers, having an understanding of discovery across their consortium will continue to be an ongoing challenge and opportunity.

Ex Libris

Discovery can take many shapes and forms. Too often, though, we tend to focus on the mass of electronically available data that is part of our library discovery systems. But many libraries have very special, sometimes even unique collections that require special attention if we do not want it lost in the mass of other material when users are searching. The focus of this part of the session is to look at such collections and how they can be made better discoverable with the example of the collection discovery feature of Primo, one of the Ex Libris discovery systems.

Collection discovery provides users with two entry points to a collection and its content. First it allows the discoverability of individual items from a collection and a metadata record of the collection in the "OneSearch" search results. After clicking on the detailed view of such an item, users see a virtual shelf with other items of the same collection—in the image example called "gallery"—that they can browse and access (Figure 8).

The second entry point is the collection itself. The design allows users to browse and search within a collection and within its hierarchy (Figure 9). Direct links to such a collection can be embedded anywhere the library chooses, for example the library webpage or faculty pages.

Such special collections can take many forms. Institutions use collection discovery to promote a variety of local image collections, from artworks to slide collections. But there are also other examples, such as letters and manuscripts, audio and video collections, special regional or local interest collections—such as material about historic events—educational and open educational resources, past exam papers, or other material around subjects that the library deems important for their users. All those items should be discoverable in the library discovery system's search. A feature like collection discovery can provide additional visibility *and* give such collections the exposure they deserve (Figure 10).
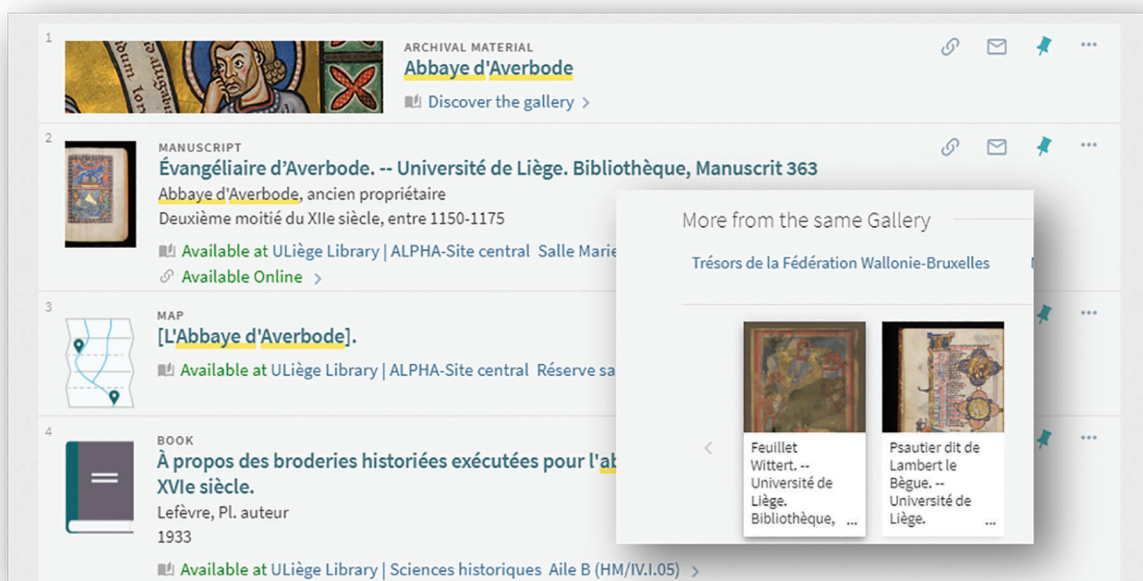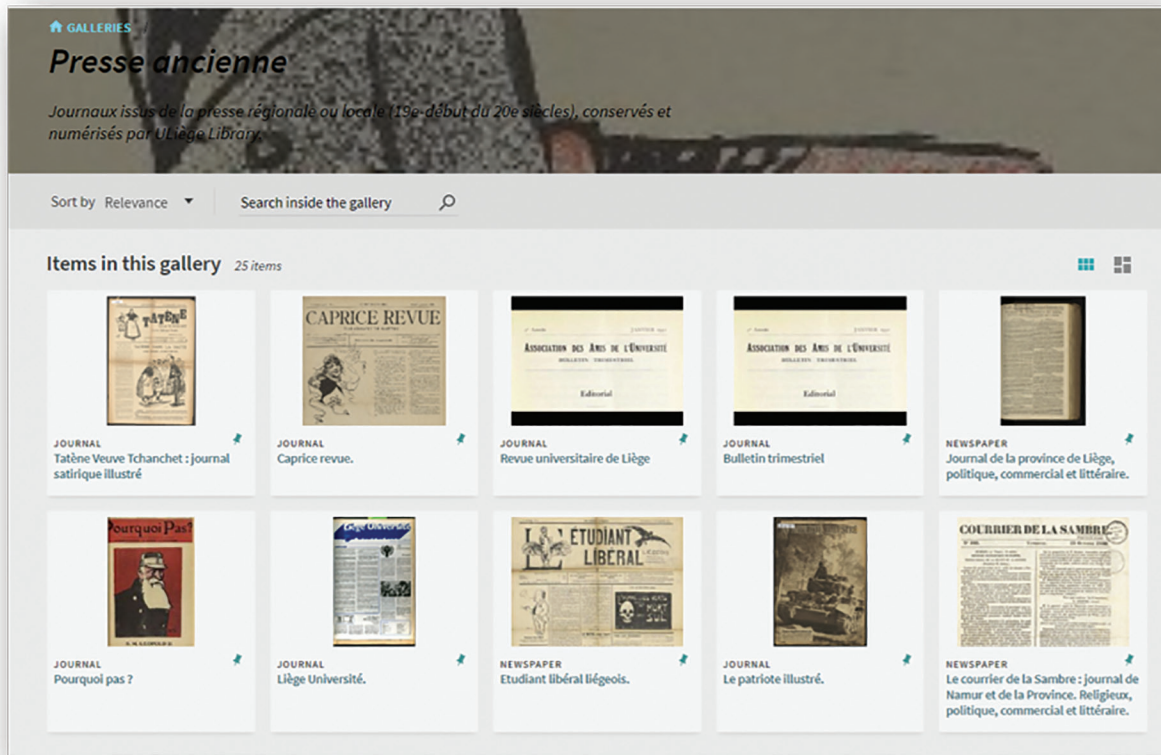

Figure 8. Ex Libris—OneSearch Gallery.

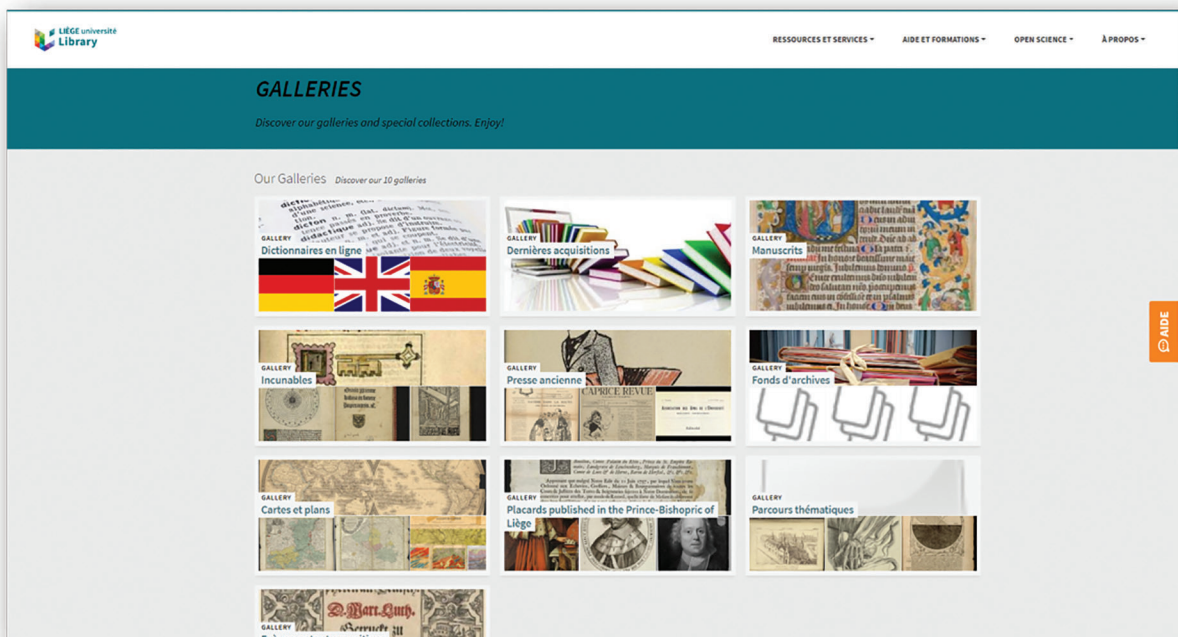**Figure 9: Ex Libris—Collection view.**

Figure 10. Ex Libris—Special collections galleries.

Conclusion

In conclusion, discovery services continue to change and evolve. As demonstrated by these three libraries and by the work done by Ex Libris, discovery is a unique experience across institutions. Whether it's including consortial holdings and items available through patron-driven acquisition or providing easy access to items stored off-site or in a BookBot, the options for discovery are abundant. As libraries continue to include less traditional formats in their discovery layers, they will need to continually evaluate the needs of their users. Likewise, publishers and companies like Ex Libris that develop and provide consistent and high-quality metadata through their discovery services like Primo and Central Discovery Index will need to continue to refine their services to meet the needs of libraries and their users.