

Improving Discovery...It's More Than Just a Product

Part I of "Improving Library Resource Discovery: Exploring the Possibilities of VuFind and Web Scale Discovery in a Consortial Environment"

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Definition of Terms

Catalog Overlay

A public search interface for your library catalog, often simultaneously offered with a traditional OPAC. May work with a combination of information refreshed periodically and real time information, and adds enhanced searching, filtering and display features.

Web Scale Discovery

A single search and display interface for multiple resource databases including, but not limited to, a library's catalog, journal databases, image databases, electronic books, institutional repositories and multimedia repositories. Can combine multiple information collection methods such as periodically refreshed pre-harvested indexes, federated searching and more direct queries of databases.

Harvested Index

An export of database content designed to make searches of this data by another server faster. Exports are often done on a regular schedule such as 1/day, so they will only show changes to the database made before the most recent harvest. This level of detail of a harvest's metadata can also be less than the detail of the original data to improve speed.

Federated Searching

Real time searching of external databases by another server to bring search results together into one list. Unlike harvests, federated search results give the most up to date information at the expense of speed.

SWOT Exercise - Bridge Consortium Example

A SWOT analysis is tool groups can use to analyze a complex situation. It helps to organize all the information you are gathering and communicate your findings back to stakeholders.

Here's an example of a SWOT filled out with examples from the Bridge Consortium discovery investigation process.

<p>Strengths</p> <ul style="list-style-type: none">● Explicit charge from both colleges in consortia (e.g. buy-in, staff time)● Existing consortial relationship● Knowledge gained from (1) previous task forces exploring overlays and (2) Metalib implementation project	<p>Weaknesses</p> <ul style="list-style-type: none">● Charge was:<ul style="list-style-type: none">○ Broad○ Focused on a product-based solution● No new hires● Need to work within existing staff time and expertise● Legacy library systems
<p>Opportunities</p> <ul style="list-style-type: none">● Partner within consortia● Outsource for expertise we don't have● Internal web programming capabilities● Learn from other libraries who come before us	<p>Threats</p> <ul style="list-style-type: none">● Memories and associations with discovery● Discovery vendor marketplace:<ul style="list-style-type: none">○ Highly competitive○ New and emerging○ Volatile

SWOT Exercise - Your Turn

Spend about 5 minutes filling out a SWOT for your library's (or consortium's) discovery investigation (either real or some point in the future).

- What would be a few of the **Strengths, Weaknesses, Opportunities, and Threats** for your library?
- Write some of them down on this **empty SWOT** and then confer with the others at your table.
- Then **we'll regroup and discuss** what everyone considered for their libraries and also just the process of coming up with a SWOT.

We've plugged in a **few examples** just to get you started.

<p>Strengths</p> <ul style="list-style-type: none">• E.g.: Recent hire who implemented discovery at previous library	<p>Weaknesses</p> <ul style="list-style-type: none">• E.g. Lack of interest among part of staff
<p>Opportunities</p> <ul style="list-style-type: none">• E.g. Director has mandated we implement discovery tool by 2013	<p>Threats</p> <ul style="list-style-type: none">• E.g. Significant budget cuts that would fund this purchase

Samples from Requirements List

- Display results from many kinds of databases
- Real time status/availability of print materials
- Faceted searching
- User comments, ratings, reviews or records.
- Book basket, research basket feature.
- Can easily link to electronic copies.
- Advanced search option.
- Flexible web layout.
- Can generate RSS feeds for lists like "New items in the library"
- Has an option for outsourced support and development.

Requirements List - Possible Categories

Intelligent Searching Features

Facets, spelling suggestions, results ranking, highlighted search terms, previews.

Silo Reduction

Features that reduce the barriers between resources, either by having resources that are more open and share information, or resources that can be accessed through one tool.

Layout and Customization

Features that effect the look and feel of the site as well as your ability to customize the site to adapt to new tastes and online tools.

Administration

Features that make it easy for staff to add to and maintain the data. Includes, error checking, import/export of data, report generation and batch processes.

Security

Features that protect not only the information of administrative and public users, but also the integrity of the descriptive data in the system.

Support

Issues relating to how your system will be set up, maintained and how it will grow over time. Examples include in-house vs. outsourced support, different options for outsourced support, in-house expertise and realistic available staff time for software development and maintenance.

Some Suggested Readings

There are many articles on discovery that were useful for our group but here are some that are either particularly relevant to our session or just great for getting started.

Breeding, Marshall. "Library Technology Guides: Key Resources in Library Automation," *Library Technology Guides*, accessed February 29, 2012. <http://www.librarytechnology.org/>.

Digby, Todd, and Stephen Elfstrand. "Discovering Open Source Discovery: Using VuFind to Create MNPALS Plus." *Computers in Libraries* 31, no. 2 (March 2011): 6-10.

Rowe, Ronda. "Web-Scale Discovery: A Review of Summon, EBSCO Discovery Service, and WorldCat Local." *The Charleston Advisor* 12 (July 2010): 5-10.

Tay, Aaron. "Articles on Discovery - Unified Resource Discovery Comparison," accessed February 29, 2012, <http://sites.google.com/site/urd2comparison/articles-on-discovery>. Tay has compiled an excellent bibliography on discovery and is adding to it regularly.

LJ Reviews. "Discovering What Works: Librarians Compare Discovery Interface Experiences — Library Journal Reviews." *Library Journal*, December 7, 2011. Accessed February 29, 2012, <http://reviews.libraryjournal.com/2011/12/reference/discovering-what-works-librarians-compare-discovery-interface-experiences/>.

Vaughan, Jason. "Web Scale Discovery Services." *Library Technology Reports* 47, no. 1 (January 2011): 1-68.