Advancing Discovery Services for Libraries

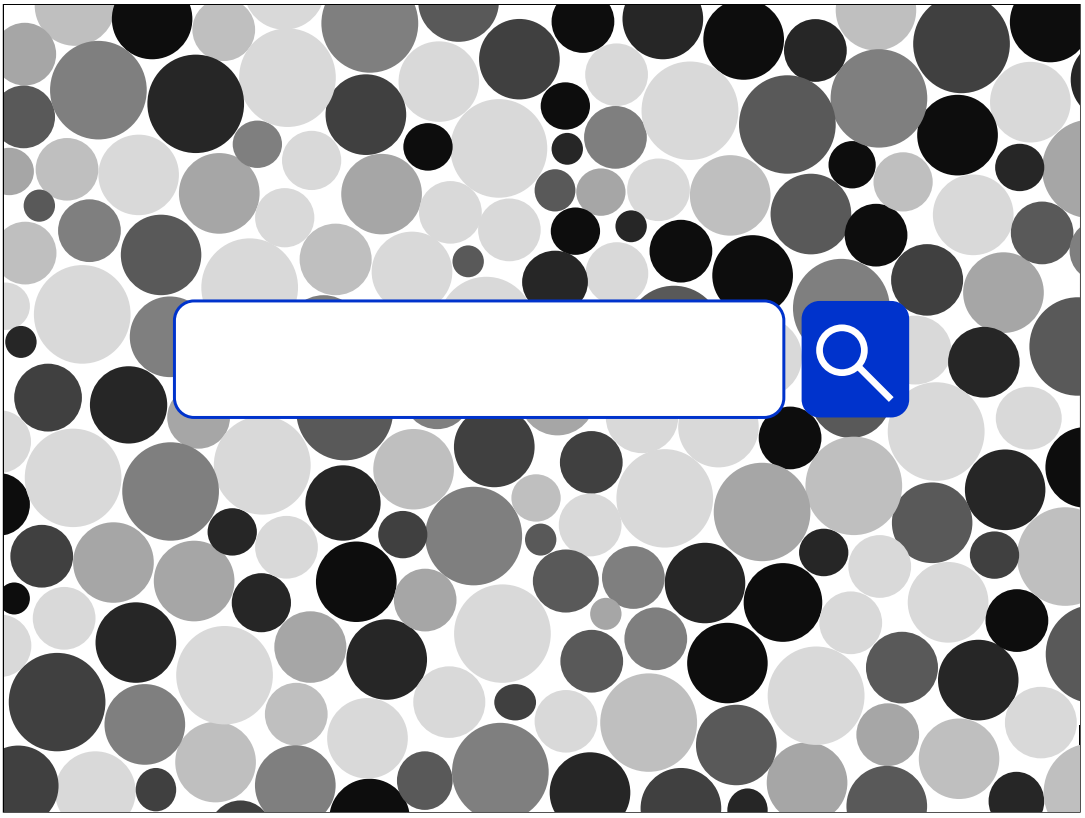
Jenny Walker

Fiesole Retreat

April 2012

ExLibris
The bridge to knowledge

Discovery based on indexed search is advancing and as I will say a little later there is a new NISO initiative—the Open Discovery Initiative—to help advance further.



Hundreds of millions of documents

Unique, local collections and global materials

Many material types

Heterogeneous user population

Lack of search literacy – path of least resistance/least effort

Short attention span

NYU report *tripling* of usage of their resources…

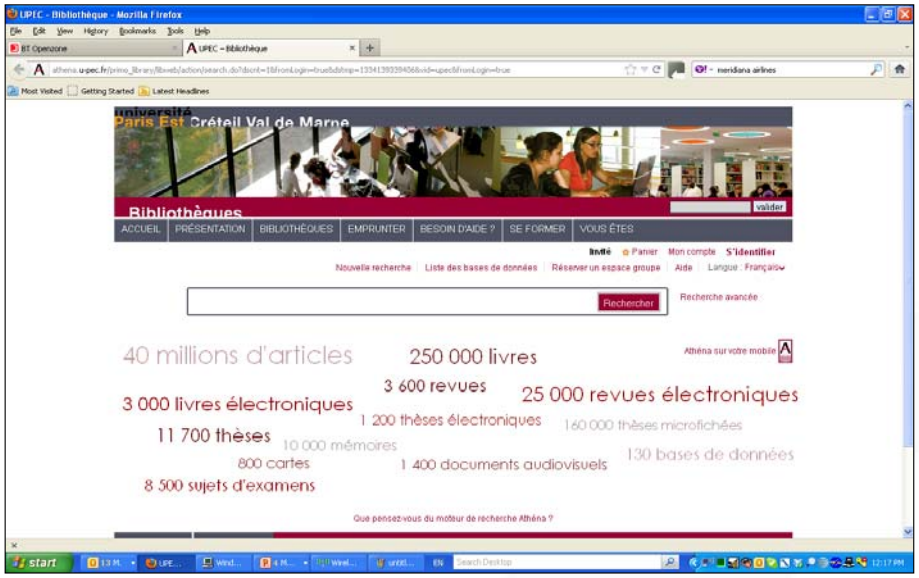
These discovery services have been successful and are being much used.
NYU – significant increases immediately post Primo implementation and growth continues

...while reducing the time for users to discover relevant information by 67%

At the same time, students were able to find the information that they were seeking 1/3 of the time that it used to take them to conduct their research.

Primo proved to be a more effective aide in delivering the appropriate information that users sought and enabled them to focus their time on using scholarly resources for their coursework and research rather than spending time trying to find the right information.

Université Paris Est



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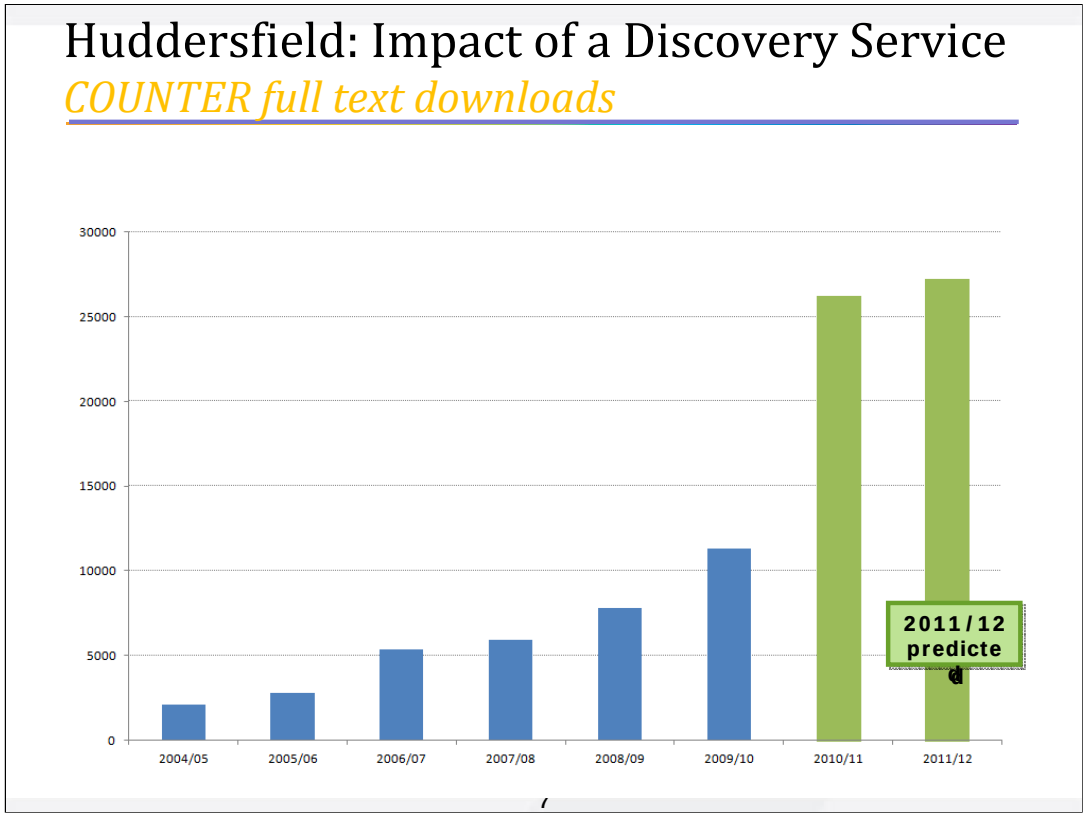
http://athena.u-pec.fr/primo_library/libweb/action/search.do?dscnt=1&fromLogin=true&dstmp=1334139339406&vid=upec&fromLogin=true

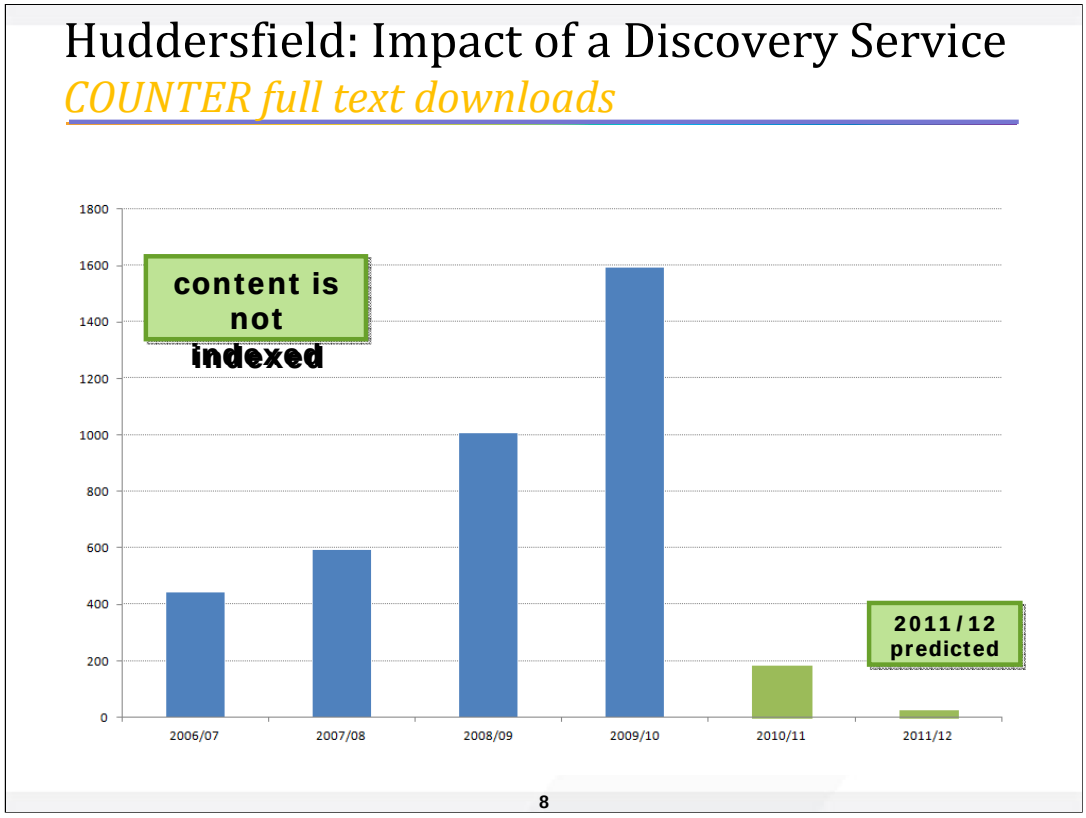
Used to be Universite Paris 12.

UPEC – an ebook provider. Previously the ebooks were included in the OPAC.



Dave Pattern of Huddersfield University reported 2 weeks ago at UKSG on 300%+ increases in usage of specific resources on implementation of their Discovery service – in terms of COUNTER full text downloads. In particular for journal publisher platforms. There was not such an increase for some aggregator platforms that faculty specifically recommended to their users ie lecturers often told students to "go and find something relevant on database X" (e.g. CINAHL, Emerald, JSTOR, etc), so those databases were already getting healthy usage.

Journal publisher platform. In general, we've seen 300%+ increases in article downloads, primarily driven by click thrus from Discovery service searches



Dave also showed some examples of significant decreases in usage for publishers not yet contributing their content to discovery services. If the publisher's content isn't indexed in the discovery service, students need to go directly to the database to find it ...and, in general, they're not.

An extreme case but can you really see Huddersfield renewing the subscription for this database?

Huddersfield also reports that since launching Summon, they've seen a decrease in the number of students go directly to the database's native interface and logging in via Athens.

YONSEI UNIVERSITY report search results returned in less than a second…

Others report search results returned in less than a second

Compare this with just-in-time metasearch

…and that users found what they needed on the first page of results

And users found everything that they needed on the first page of results – local print and digital resources as well as remote e-resources including articles, ebooks and more.

900+ customers in 47 countries have selected Primo as their discovery service of choice

Primo first introduced just over 4 years: the Primo Central index was added 3 years ago. Primo Central index was added 3 years ago and we have over 600 Customers using this –predominantly with Primo but a few independently including some publishers.

Primo has 1/3rd share of the market (Marshall Breeding April 2012 – library Automation marketplace) so you can see that these services are very popular—and are rapidly replacing just-in-time metasearch.

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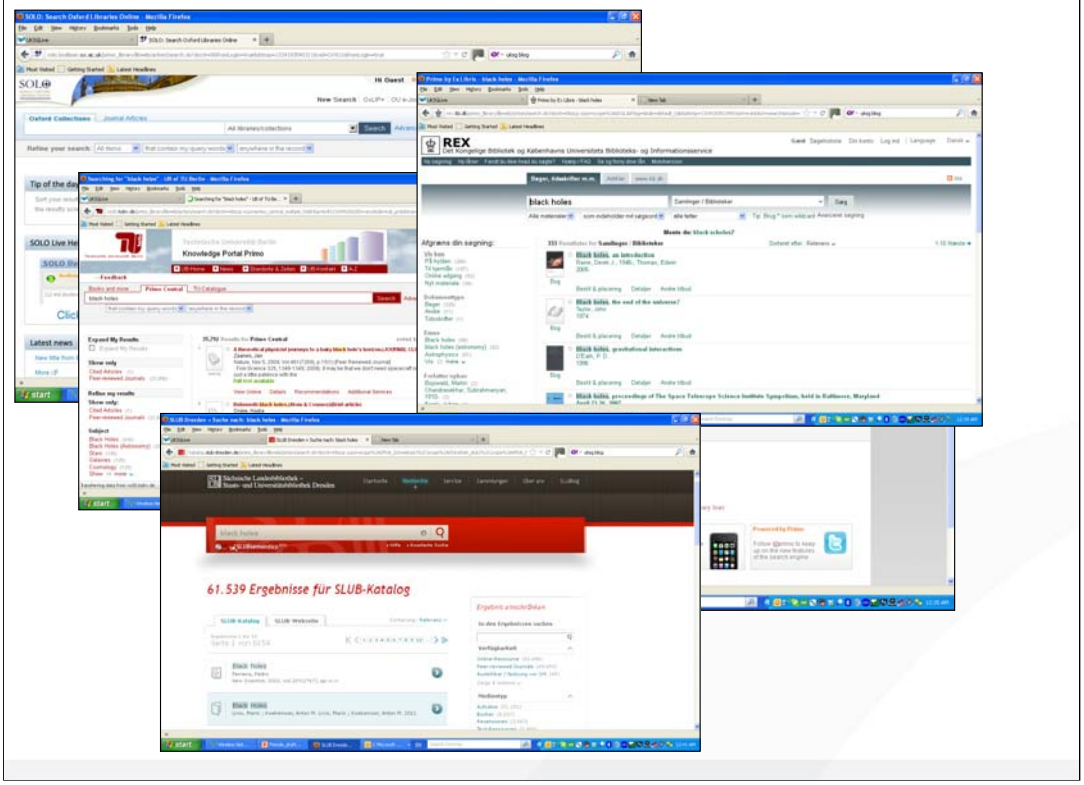
Play it with sound!

http://www.youtube.com/watch?v=fDc6kJo6SX8


REX
black holes
Knowledge Portal Primo
61.539 Ergebnisse für SLUB-Katalog

Discovery services are focussed on serving the end user. As vendors we sit between the information providers on the one hand and on the other the libraries (serving their users)

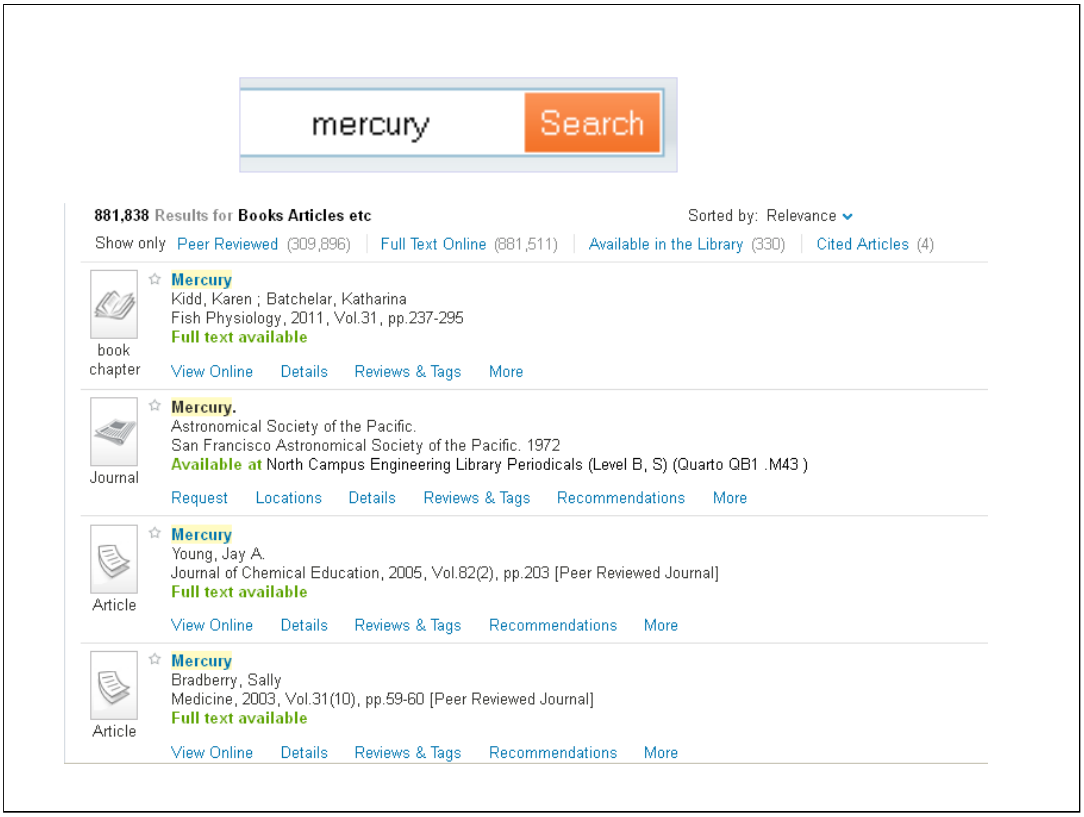
Michael Mabe UKSG 2012 – in debate about the future of the scholarly journal, Michael suggested that to better understand why the journal has not changed is to understand the behaviour of the researcher – as both author and as reader.

Reader mode:
To **identify** relevant content
To **select** based on **trust** and **authority**
To **locate** and **consume** it
To **cite** it
Michael Mabe – UKSG 2012

For librarians—expose selected content as widely as possible. Integrate with other library services –and institutional services

To identify relevant content

The more you look at the world, the more you recognise that people have different ideas about what's important.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881,838 Results for Books Articles etc
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Mercury
Kidd, Karen ; Batchelar, Katharina
Fish Physiology, 2011, Vol.31, pp.237-295
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San Francisco Astronomical Society of the Pacific. 1972
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Young, Jay A.
Journal of Chemical Education, 2005, Vol.82(2), pp.203 [Peer Reviewed Journal]
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Bradberry, Sally
Medicine, 2003, Vol.31(10), pp.59-60 [Peer Reviewed Journal]
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Facets

Refine My Results

Subject

Mercury (Metal) (2,441)
Fishes (1,757)
Selenium (1,252)
Methylmercury (1,022)
Oxidation (686)
Air Pollutants (658)
Fish (649)
Mercury (Planet) (647)
Literature (546)
Mercury Contamination (32)
Great Britain (19)
Fusion (14)
Country (9)
United States (9)
Rock &amp (7)
Roll (7)
American newspapers (5)
Boston (Mass.) (4)
Mercury Finance Company (4)
Mercury poisoning (4)
Mercury compounds (4)
Mercury industry and trade (4)
Air (3)
Pollution (3)
Gold (2)
Polarography (2)
Mercury in the body (2)

Resource Type

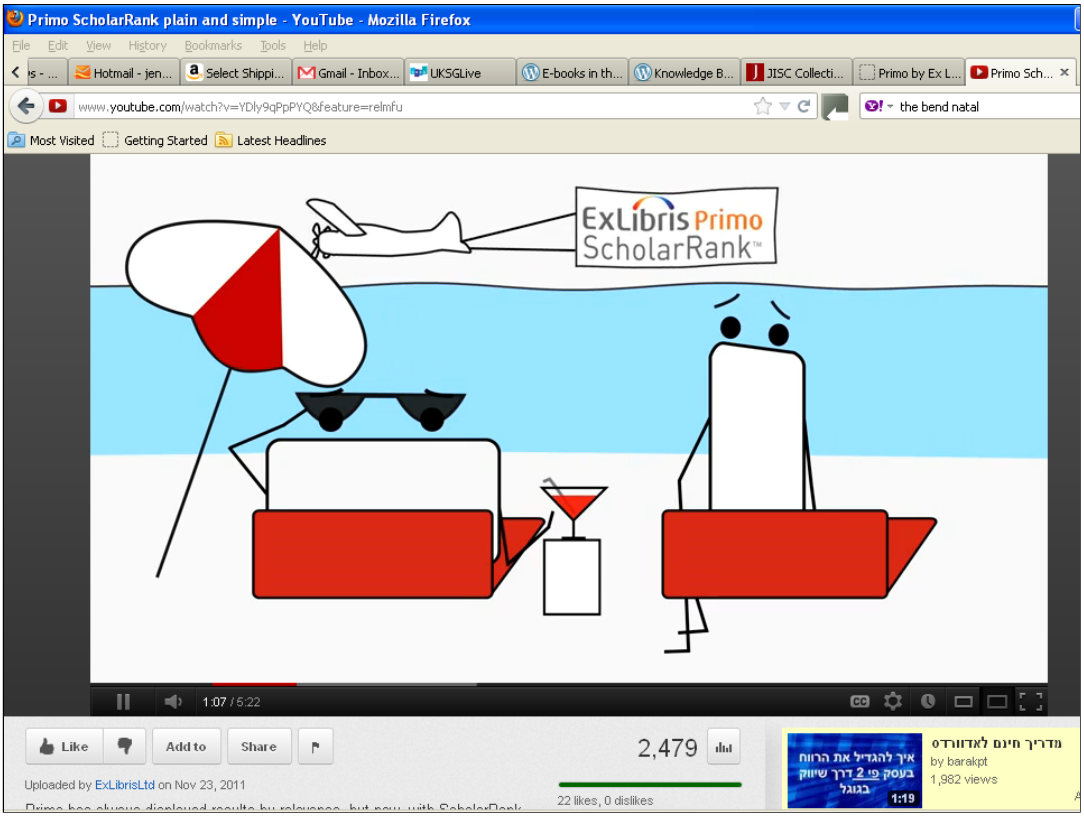
Newspaper articles (424,613)
Articles (406,918)
Text Resources (29,456)
Reviews (16,382)
Books (9,868)
Show 11 more

Collection

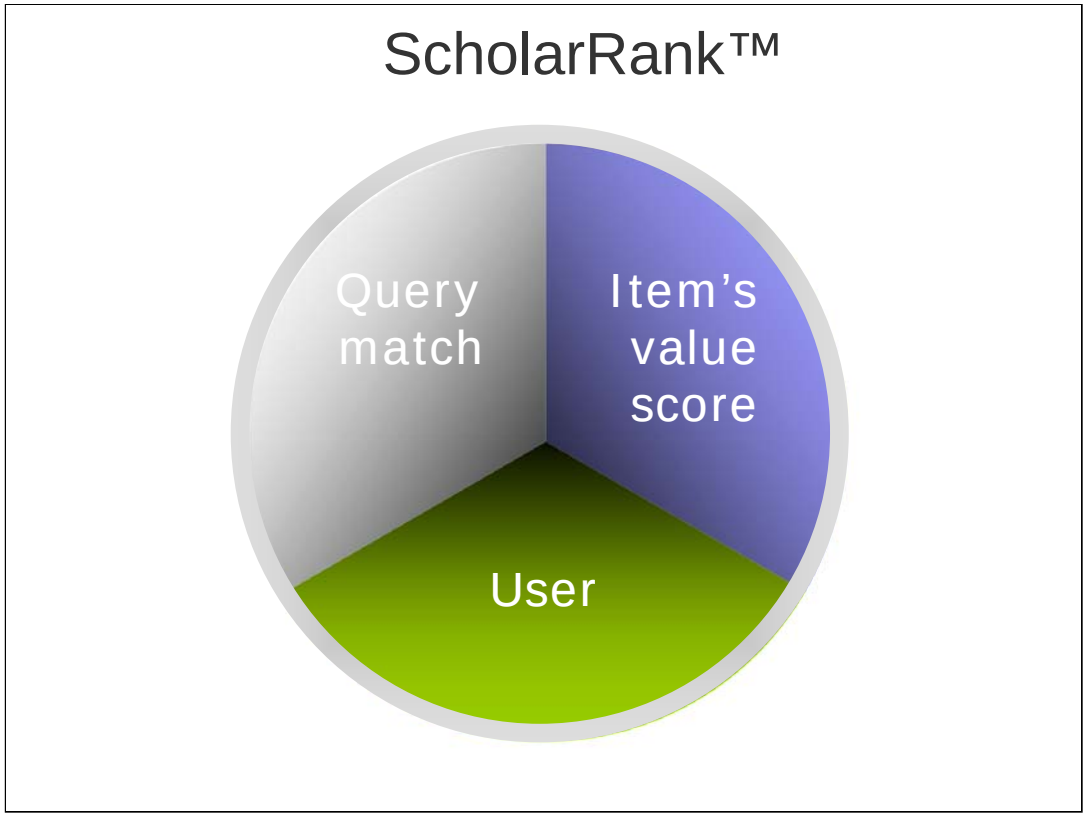
ScienceDirect (Elsevier) (204,577)
MEDLINE (NLM) (60,416)
SciVerse ScienceDirect Books (Elsevier) (4,346)
American Chemical Society (CrossRef) (2,105)
Arts & Sciences (JSTOR) (1,722)
Nature Publishing Group (CrossRef) (1,283)
Dawsonera (1,050)
SpringerLink Book Series (880)
North Campus Main Library (172)
ebrary Books (76)

Journal Title

American Metal Market (2,283)
Atmospheric environment (725)
Chemosphere (1,685)
Coordination Chemistry Reviews (637)
Earth And Planetary Science Letters (259)
Show 13 more



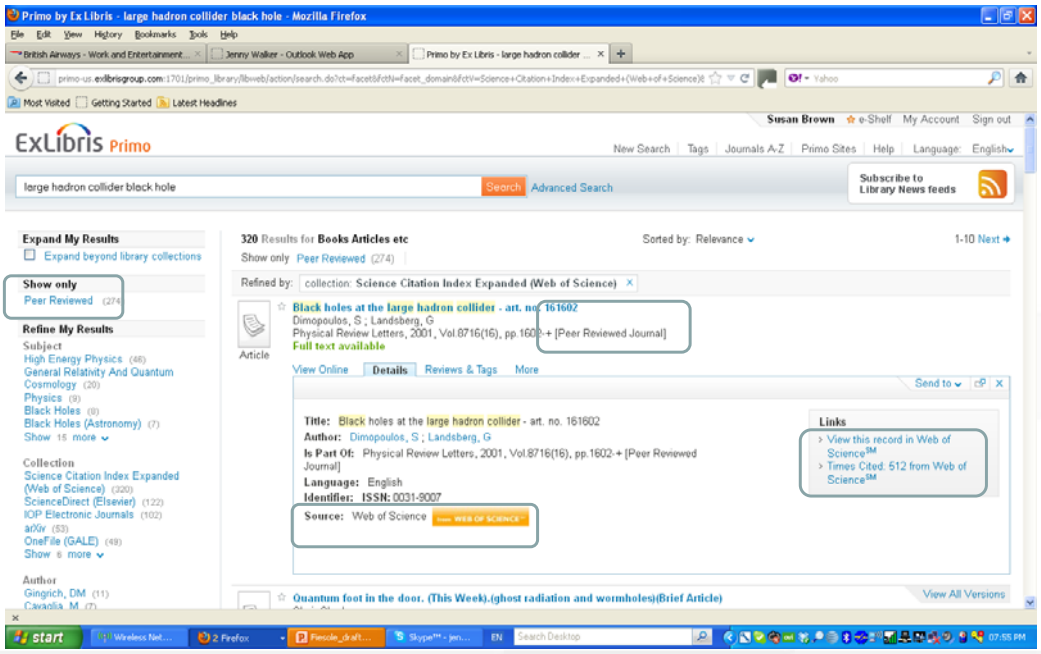
However, to really advance ranking to the next level, we have to add the user into the equation – ranking has to be made personal.



To summarize our Scholarrank technology – this is based on the match between the query terms and the document, the item's value score (using external factors such as usage, citations) and also the context of the user. User's stated discipline and user's mode of query – known-item search, broad topic-search, or narrow-topic search. For topic searches reference material and review articles will be given higher rankings.

Selection based on trust and authority. Trust by users that they are seeing the correct and the latest material. Trust that they are seeing everything. Trust that everything they want is there (impact on resources not indexed in the discovery services?)

Trust and Authority



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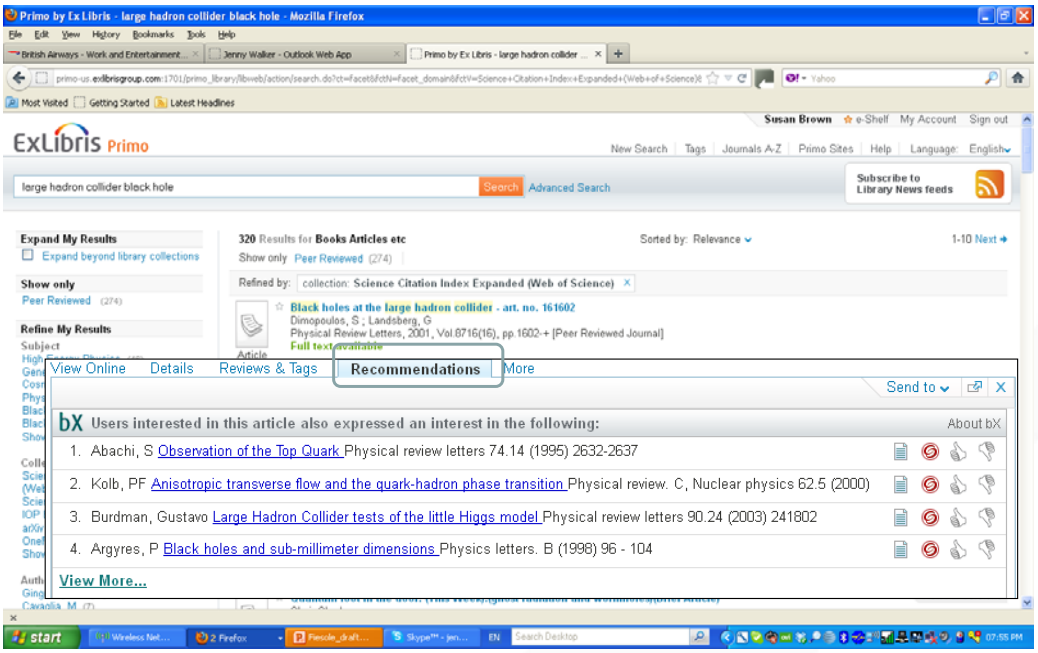
Identify the source
Peer review
Impact factor
Usage by others eg bX, other standard metrics

Trust and Authority



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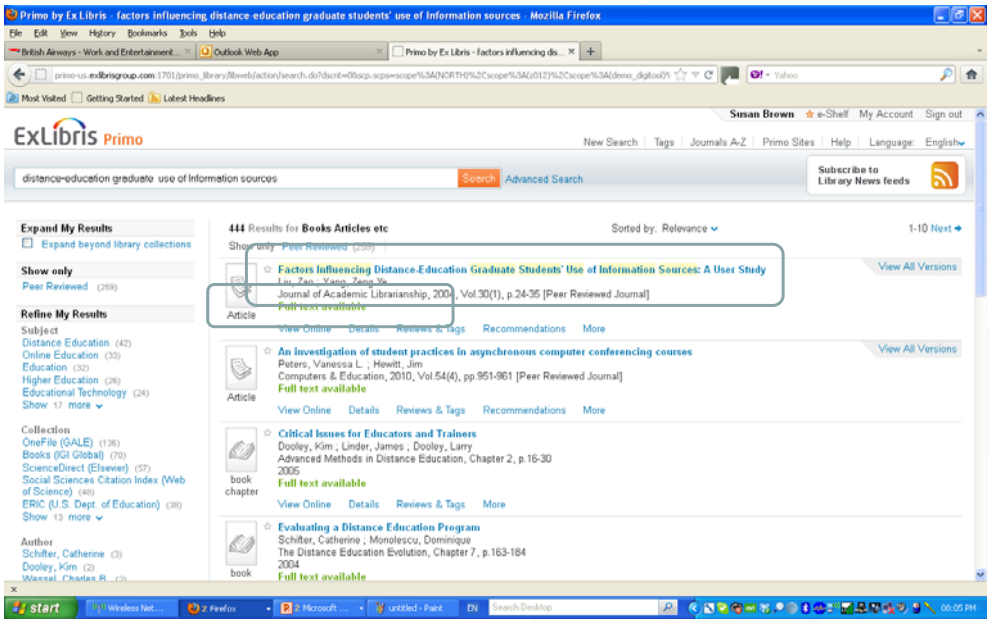
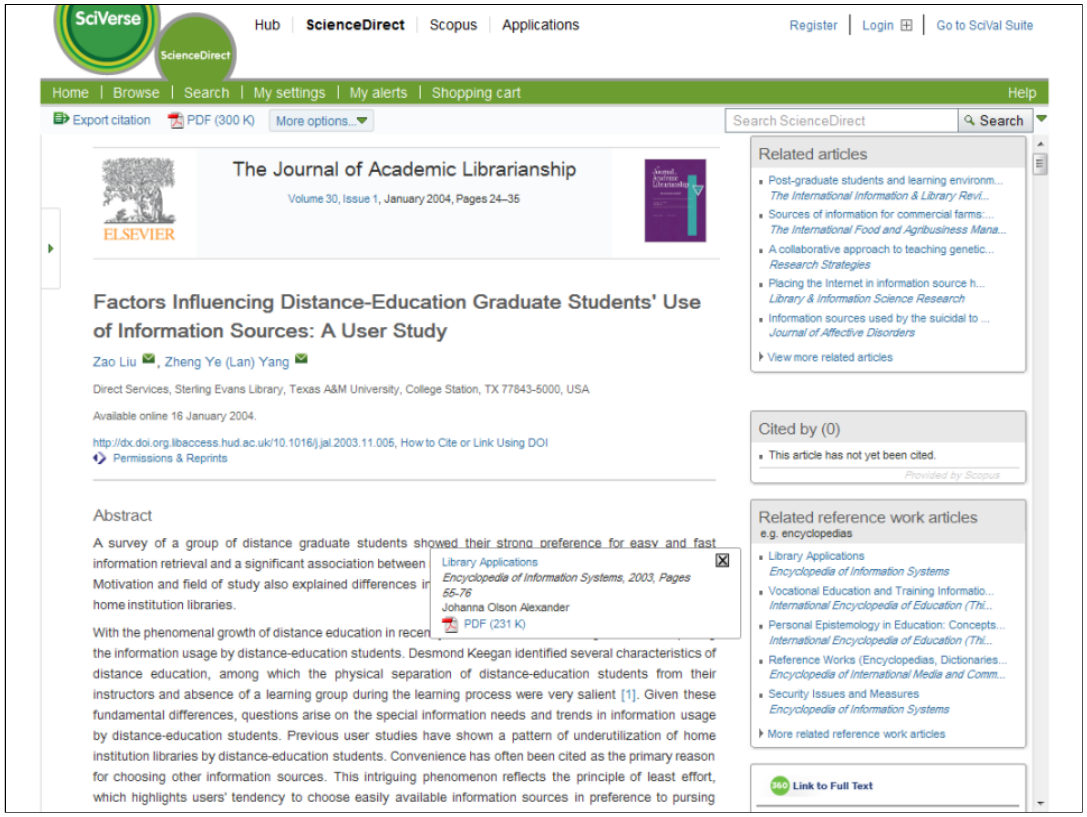
Identify the source
Peer review
Impact factor
Usage by others eg bX, other standard metrics

To locate and consume it

Full text indicator/OpenURL linking

Locate and Consume

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Search
The Journal of Academic Librarianship
Volume 30, Issue 1, January 2004, Pages 24–35
ELSEVIER
Factors Influencing Distance-Education Graduate Students' Use of Information Sources: A User Study
Zao Liu, Zheng Ye (Lan) Yang
Direct Services, Sterling Evans Library, Texas A&M University, College Station, TX 77843-5000, USA
Available online 16 January 2004.
http://dx.doi.org.libaccess.hud.ac.uk/10.1016/j.jal.2003.11.005, How to Cite or Link Using DOI
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Abstract
A survey of a group of distance graduate students showed their strong preference for easy and fast information retrieval and a significant association between
Motivation and field of study also explained differences in
home institution libraries.
With the phenomenal growth of distance education in recen
the information usage by distance-education students. Desmond Keegan identified several characteristics of distance education, among which the physical separation of distance-education students from their instructors and absence of a learning group during the learning process were very salient [1]. Given these fundamental differences, questions arise on the special information needs and trends in information usage by distance-education students. Previous user studies have shown a pattern of underutilization of home institution libraries by distance-education students. Convenience has often been cited as the primary reason for choosing other information sources. This intriguing phenomenon reflects the principle of least effort, which highlights users' tendency to choose easily available information sources in preference to pursing
Library Applications
Encyclopedia of Information Systems, 2003, Pages 55-76
Johanna Olson Alexander
PDF (231 K)
Related articles
Post-graduate students and learning environm...
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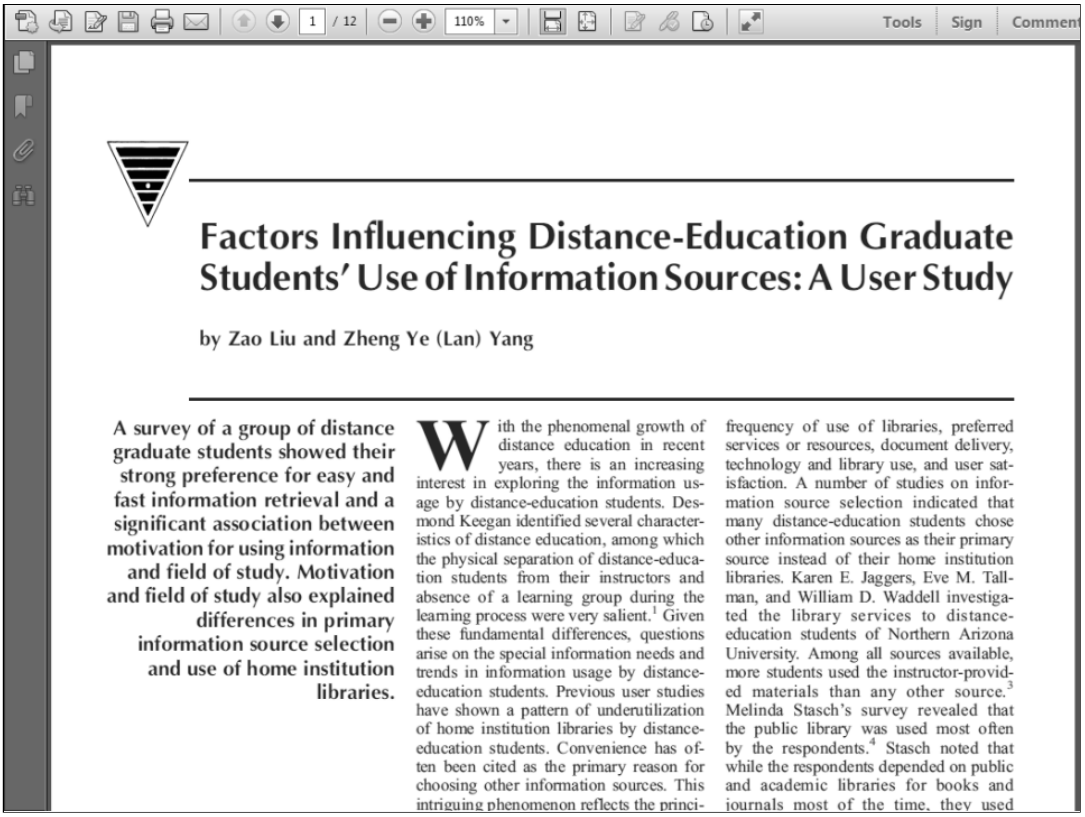


Factors Influencing Distance-Education Graduate Students' Use of Information Sources: A User Study

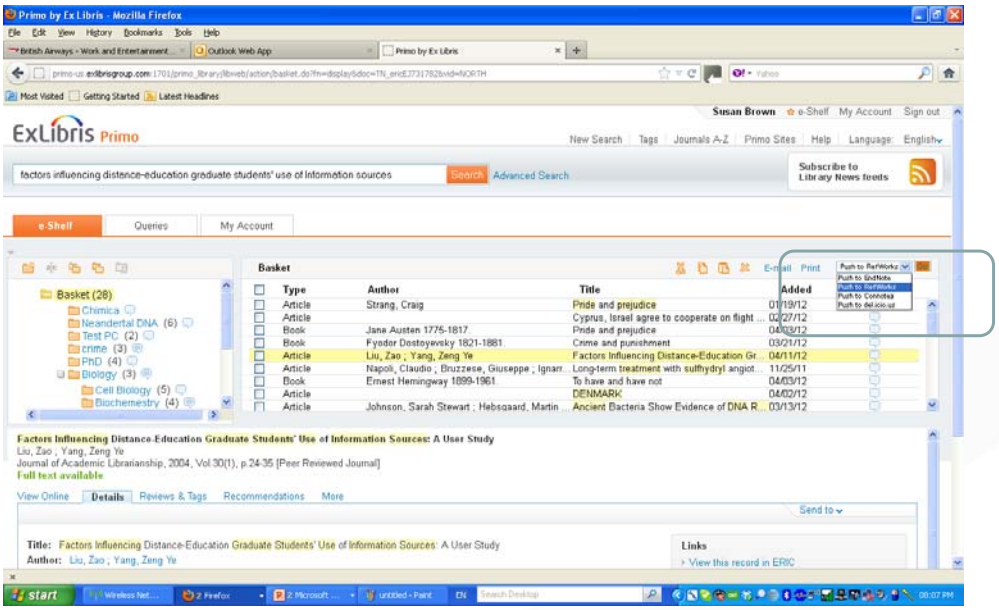
by Zao Liu and Zheng Ye (Lan) Yang

A survey of a group of distance graduate students showed their strong preference for easy and fast information retrieval and a significant association between motivation for using information and field of study. Motivation and field of study also explained differences in primary information source selection and use of home institution libraries.

With the phenomenal growth of distance education in recent years, there is an increasing interest in exploring the information usage by distance-education students. Desmond Keegan identified several characteristics of distance education, among which the physical separation of distance-education students from their instructors and absence of a learning group during the learning process were very salient.[1] Given these fundamental differences, questions arise on the special information needs and trends in information usage by distance-education students. Previous user studies have shown a pattern of underutilization of home institution libraries by distance-education students. Convenience has often been cited as the primary reason for choosing other information sources. This intriguing phenomenon reflects the principi- frequency of use of libraries, preferred services or resources, document delivery, technology and library use, and user satisfaction. A number of studies on information source selection indicated that many distance-education students chose other information sources as their primary source instead of their home institution libraries. Karen E. Jaggers, Eve M. Tallman, and William D. Waddell investigated the library services to distance-education students of Northern Arizona University. Among all sources available, more students used the instructor-provided materials than any other source.[3] Melinda Stasch's survey revealed that the public library was used most often by the respondents.[4] Stasch noted that while the respondents depended on public and academic libraries for books and journals most of the time, they used

To cite it

Cite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Liu, Zao ; Yang, Zeng Ye
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Author: Liu, Zao ; Yang, Zeng Ye
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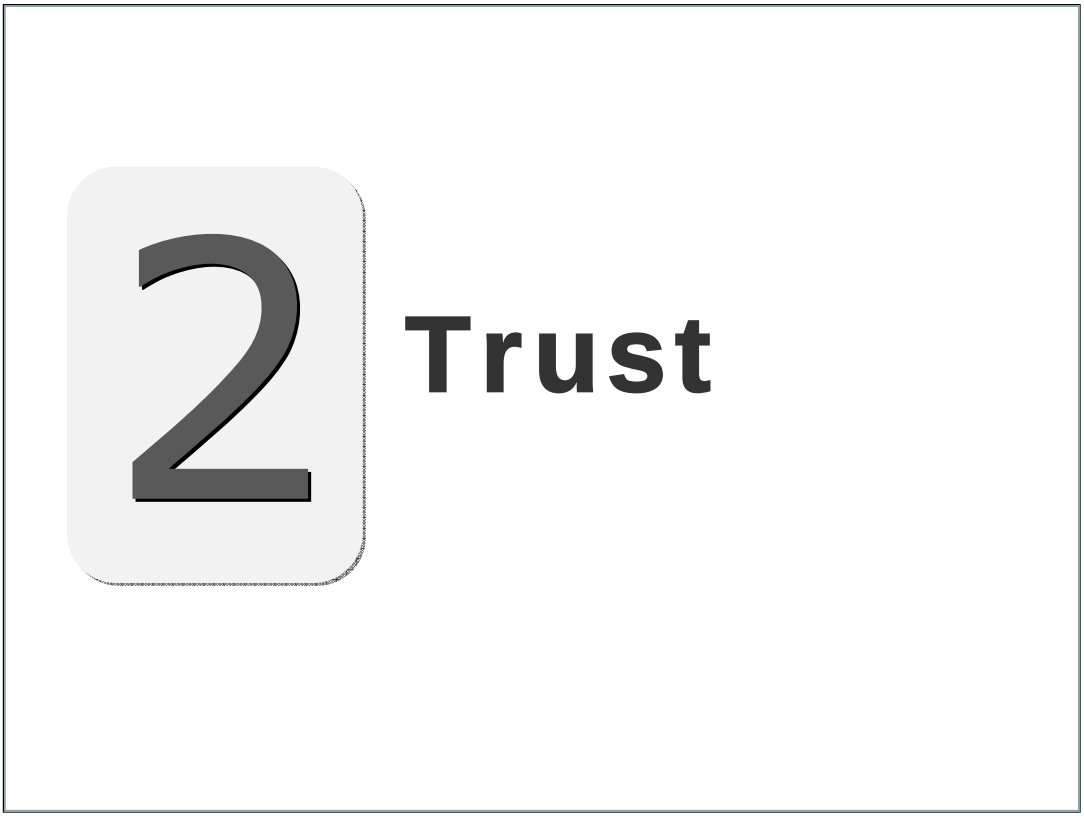
Discovery services must also serve the publishers –

Publishers must decide what content is appropriate and at what level.



respect the rights of the publisher and be sensitive to their business needs.

Trust by the information provider that the information indexed is correct and updated. Sharing of information on the use of the indexed content. Show users only what they are allowed to see.

Authority – indicate the source of the record.

Fair linking by discovery providers – typically in the hands of the library via OpenURL link resolvers.

I have briefly touched on these as you will hear directly from some publishers today.

http://info.nfais.org/info/codedraftintroduction.pdf

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But I should mention here the draft NFAIS Discovery Code of Practice that has been released by NFAIS for comment. This covers a number of areas of concern to information providers and also issues that they believe will improve the ecosystem.

I will be the first to admit that there is room for improvement. Libraries also have some issues around Discovery services, in particular the lack of common language to help them evaluate the different discovery services.

Hence the formation of the NISO Open Discovery Initiative(ODI). Speaking with one common language will go a long way to help all the discovery stakeholders. ODI will address this and more….

Discovery based on indexed search works today mostly on proprietary –and sometimes informal--agreements between vendors and discovery service providers. Most things work well but there is plenty of room for improvement that will better serve all the stakeholders – discovery vendors, publishers, libraries and thereby the end users. To take discovery to the next level we need some best practice recommendations.

One body of people, all with the same language.

Giant Tower of Babel Sculpture Made of 30,000 Books
By EDW Lynch on May 17, 2011
"Tower of Babel" by Argentinian artist Marta Minujin is a seven story tall sculptural structure covered in 30,000 books from all over the world. The tower resides in Plaza San Martin in Buenos Airies, and celebrates the city's nomination as World Book Capital 2011 by UNESCO. On May 28, The Tower of Babel will be disassembled and the books will be given away to the public.

Balance of Constituents

Libraries

Marshall Breeding, Vanderbilt University
Jamene Brooks-Kieffer, Kansas State University
Laura Morse, Harvard University
Ken Varnum, University of Michigan
Anya Arnold, Orbis Cascade Alliance
Sara Brownmiller, University of Oregon
Lucy Harrison, College Center for Library Automation (D2D liaison/observer)

Publishers

Lettie Conrad, SAGE Publications
Beth LaPensee, ITHAKA/JSTOR/Portico
Jeff Lang, Thomson Reuters
Linda Beebe, American Psychological Ass
Aaron Wood, Alexander Street Press

Service Providers

Jenny Walker, Ex Libris Group
John Law, Serials Solutions
Michael Gorrell, EBSCO Information Services
David Lindahl, University of Rochester (XC)
Jeff Penka, OCLC (D2D liaison/observer)

Project goals

- Identify stakeholders' needs & requirements
- Create recommendations & tools to streamline process
- Provide effective means of assessment

Specific deliverables

- Standard vocabulary
- NISO Recommended Practice:
  - Data format & transfer
  - Communicating content rights
  - Levels of indexing, content availability
  - Fair linking to content
  - Usage statistics
- Mechanisms to evaluate compliance
- Spread this information

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Standard vocabulary – so we can all speak with one language

Timeline

Milestone	Target Date	Status
Appointment of working group	December 2011	
Approval of charge and initial work plan	March 2012	
Initial information gathering and agreement on process and tools	June 2012	
Completion of information gathering	October 2012	
Completion of initial draft	January 2013	
Completion of final draft	May 2013	

Next steps

Summer-Fall 2012:

- Determine processes & tools
- Gather information from stakeholders

Connect with ODI

- Project website:
  http://www.niso.org/workrooms/odi/
- Interest group mailing list:
  http://www.niso.org/lists/opendiscovery/
- Email ODI:
  odi@niso.org

Thank You!

Jenny Walker
Jenny.walker@exlibrisgroup.com