Implementing a Discovery System: Getting Things Right

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Discovery at EKU Library (lack thereof)

- Ongoing Discovery & ILS discussions for years
- Our perspective:

  The choice of a Discovery Tool is inter-related (even conditioned) with the choice of Integrated Library System

- Fall 2013: UX compared Primo and WorldCat Local
Examples of UX Searches
(User Experience)

- managerial leadership
- welfare reform
- cognitive interview
- bullying
- elearning
- using ipads to build early literacy skills
- Henry VIII and Anne of Cleves
- police surveillance cameras
- cholera
- social media advertising
- international talent management
- talent management in developing countries
- african-americans and retention
- at risk students
- academic support students and at risk students
- customer service skills
- sanitation
- slavery
2011: researchers at Bucknell University ( Summon since 2009) & Illinois Wesleyan University (EDS since 2011)
The Discovery Tools Project was a spinoff from the ERIAL Project (Ethnographic Research in Illinois Academic Libraries)
Purpose of the study: to obtain a more holistic and user-centered understanding of student research practices
Research tasks typically faced by undergraduate students; preset questions

Andrew Asher, Lynda Duke, Suzanne Wilson - Paths of Discovery: Comparing the Search Effectiveness of EBSCO Discovery Service, Summon, Google Scholar, and Conventional Library Resources
“Heavy reliance on default search settings”

Google has structured the student expectations

- single search box
- simple keyword search (82% of searches)
- use the default search: very few students use Advanced search (default bias)
- evaluate the results rapidly and superficially
- expect the search to be simple: assume that if information is not easily found, it must not exist
- repeat the search rather than refine the results
- expect the information to be on the first page of results (92% of the resources utilized were found on the first page)
- outsource the evaluation of the search results and of the sources to the search algorithm (trust bias and brand bias)
“Regardless of the search system, students exhibited a marked inability to effectively evaluate sources and a heavy reliance on default search settings.”

Andrew Asher, Lynda Duke, Suzanne Wilson - Paths of Discovery: Comparing the Search Effectiveness of EBSCO Discovery Service, Summon, Google Scholar, and Conventional Library Resources
The Checklist Manifesto: How to Get Things Right
By Atul Gawande
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- checklists can help with 2 types of problems:
  - simple problems - “to make sure that simple steps are not missed or skipped”
  - complex problems - “to make sure that everyone talks through and resolves all the hard & unexpected problems”

- checklists catch “flaws of memory and attention and thoroughness”

- Dr. Peter Pronovost: checklists “establish a higher standard of baseline performance”
Origin of the Pilot’s Checklist
The volume of knowledge required for operating in a complex system can exceed an individual's ability to manage it consistently without error.
“Over the course of a year, physicians each evaluated an average of 250 different primary diseases and conditions.” (with 900 other active medical problems, 300 medications prescribed, 100 different lab tests, 40 different procedures)
For Discovery tools, we considered about 20 different criteria
The Checklist Idea

- Web user interfaces of library systems (catalog, databases, website) are behind the web and behind the users’ expectations
- EKU Library:
  - Majority of our users are undergraduate students
  - “Heavy reliance on the default search settings”
- The need for a checklist: to ensure that simple but expected features are not overlooked
- When we implement our discovery system, whichever that may be, this checklist will remind us “of the minimum necessary steps and make them explicit”
- Set students up for success (most success for most users)
Our Proposed Checklist

- Books: call number, location and availability information, book covers directly on the first screen with the results list
- Searches for known titles
- Search for single-word titles
- Articles: Full-text availability directly on the first screen with the results list
- Integration with the link resolver
- Article types easy to observe (peer-reviewed, newspaper articles, reviews, etc.)
- Integration with ILL/Library Express

- Multi-format items
- Responsive to mobile devices
- Recommendations available
- Search terms completion/suggestion
- “did you mean”
- ”text me this call number”
- OPAC functionality (patrons to place holds, renew, view fines)
- Relevancy
Our Proposed Checklist (Library Staff)

- Integration of EBSCO content
- Ways to limit to a particular database/collection
- Library Location as a facet (helpful for locations: LRC, Music Library, etc.)
- Call number search
WorldCat: Suggestions as you type

- cholera
- cholera in united states
- cholera history
- cholera immigration reforms
- cholera 1892
- cholera in detroit
- cholera haiti
- cholera canada
- cholera and england and 1854
- cholera epidemics in the united states
Primo: Suggestions as you type
Click link to see availability
Primo: Availability, Location, Call #

- Primo: Availability in result - click for more details

... a different implementation requires a click to see availability
WorldCat: Known title

#1 is the book, #2 is the DVD (which is ‘on order’)
<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Details</th>
</tr>
</thead>
</table>

#1 is an article, #2 is the book
WorldCat: Single-word title

“nature”

#4 on the list - top 3 were books
Primo: Single-word title

“nature”

#1 on the list - showing both online & print options
WorldCat: “did you mean __?”
Primo: “did you mean __?”
WorldCat: Mobile

Separate mobile interface URL
Primo: Mobile

Responsive layout
WorldCat: Using a Particular Database

Facet on left (in this example, at the top)
Primo: Using a Particular Database

Facet on left, also. In this example, it’s called “Citation Source” and is further down the page (just above bottom of results)

Not present in all implementations
Summon: Using a Particular Database

Summon analyzes results and suggests databases to search.
WorldCat: Finding a Particular Collection

“Topic” not the same as collections, but could still help users
Limit to libraries/collections in the facet
Books listed first, “versions” goes to more books, DVDs start at result #6 (similar w/ other WCLs)
Primo: multi-format items

books first, “real” Harry Potter book is result #2

seems to depend on customization in Primo

videos first

“real” Harry Potter book is result #9
WorldCat: link resolver

From Boys Town to Oliver Twist: Separating fact from fiction in welfare reform
by Craig N Shealy
Article
Language: English
Database: PsycARTICLES
Libraries that own this item: University of New Mexico

WorldCat + Link resolver

click “View Now” in results list
Primo: link resolver

Primo + SFX

Click “Find Online” in results list
Primo: Recommendations (bX)

Primo + bX
Click “Recommendations” after selecting “Find Online”
Summon: link resolver

Link displayed in results - citation info appears on right, (recommended databases again at top), favors Proquest resources
WorldCat: ILL integration

Button has been in WorldCat for a while, but only in the record view (not results)

Library doesn’t own item, so ILL button presented (logic rules)
WorldCat: ILL integration

Request button shown (not ILLiad) - this button is customizable

This is shown when library owns it, but is checked out
Primo: ILL integration

Integration via tab on record (via results list) showing SFX menu with ILLiad link
Article in results
Database on left facet
View link shown with Link Resolver tab
Primo: Ebsco integration

Article in results
Integrated with SFX linking
“It is clear that some of the observed deficiencies in students' search practices could be at least partially addressed—without students' knowledge—by choosing to structure the discovery tools' default settings in such a way that students are led to particular types of resources first within the search results. This is by far the most profound difference in the search systems evaluated in this study.”

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