

Discovery Working Group Meeting

University Librarian's Conference Room

August 30, 2016, 2:00pm

Present: Stephanie Bartz, Vibiana Cvetkovic, Judy Cohn, Joseph Deodato, Rebecca Gardner, Chad Mills, Gracemary Smulewitz, Ela Sosnowska, Bobbi Tipton, Yingting Zhang

Excused: Christie Lutz

1. Introduction to Library Systems

Two presentations were given to introduce the working group to the various technologies that make up the library discovery environment. Deodato provided a general overview of library systems including the ILS, knowledge base, link resolver, discovery tools, and library service platforms. Smulewitz provided a detailed look at how library holdings are loaded into the ILS and knowledge base as well as a summary of the GoKB project, a community-maintained open data repository that aims to make information about electronic resources freely available. Both presentations are available on Sakai.

2. History of Discovery at Rutgers

Deodato provided a brief history of discovery initiatives at RUL beginning with the Libraries' 2010 website redesign. An ethnographic study conducted the previous year was a major impetus for the redesign. One of the key findings of the study was that users were highly dissatisfied with Libraries siloed search environment and desired a simpler, more intuitive, and convenient way to locate library materials. As part of its redesign plan, the Web Board created a team specifically devoted to improving the library search experience. However, the team wasn't given the authority to modify our existing search tools or the ability to acquire new tools. Its role was more or less limited to improving navigation to existing library search tools. In the absence of a discovery layer, the team designed a tabbed search interface to guide users to the most commonly requested types of library materials (articles, books & media, journals, and reserves). The interface was based on similar designs found at other libraries as well as several rounds of prototyping and user testing. However, the final product was not without flaws, the most obvious of which was that the organization of tabs by format was largely artificial insofar as many formats remained intermixed within overlapping library systems. Furthermore, the goal of simplifying library search combined with the limited real estate available for that purpose required the designers to be selective about which search options to include. As a result, more advanced options were often placed an extra click away. Above all, the tabs gave the appearance of a single, Google-like search box without actually providing a unified and cohesive search interface. Users never quite understood that they were actually searching several different library systems with different rules and results. That said, the tabs were always intended as a temporary stop-gap measure until a proper discovery tool could be acquired and many of these problems could be addressed.

In 2013, a large cross-departmental team was appointed to research, evaluate, and recommend the selection of a web-scale discovery service. The nine-month process included extensive product research, vendor demonstrations, an RFP, local trials, and user testing. The linchpin of the team's analysis was a comprehensive evaluation rubric that included a weighted list of 55 product requirements across 5 categories. EBSCO Discovery Service (EDS) was ultimately selected for its strength of coverage, quality of indexing, low cost, and extensive customizability. It was also the fan favorite among both users and librarians in head-to-head comparative testing.

The original plan was to replace the search tabs with a single EDS search box providing access to the library catalog, institutional repository, and licensed databases. However, around the same time, Rutgers was pursuing plans to adopt OLE, an open source, community-driven ILS developed in partnership with the Kualu Foundation. Rutgers was one of several VALE member libraries slated to implement OLE as part of the VALID initiative to create a shared ILS for NJ academic libraries. In 2013, VALE selected VuFind to serve as the public interface for its shared ILS. As a result, Cabinet also decided to adopt VuFind as the interface for the Rutgers' online catalog. At this point, the plan for discovery shifted. Instead of using EDS as a full web-scale discovery service, it was decided that this product would be configured for article discovery only. In other words, it was used simply as a replacement for federated search as the engine for the articles tab. As a result, the life of the search tabs was extended beyond its original expiration date.

In 2014, RUL began work on the implementation of VuFind. The work was scheduled to be carried out in two phases. The first phase involved the replacement of the library catalog by VuFind. The second phase involved integrating EDS, RUcore, and LibGuides and deploying VuFind as a unified discovery interface. The major benefit of this configuration is that it gives the library greater control over the end user experience because it allows us customize the interface to suit local needs. It also decreases our reliance on vendors because we can easily swap out the products that serve our content on the back end without fundamentally disrupting the appearance of the front end. That said, this plan only works as long as we continue to dedicate resources and staffing to developing VuFind and related product APIs. Unfortunately, development of VuFind stalled when IT priorities shifted to CAS authentication and the resources required to complete the project never returned.

Some members of the group had to leave early and it was decided that the next meeting should pick up with a recap of this history and a discussion of next steps. It was further suggested that a diagram of RUL's current discovery environment be created to help illustrate the functions and interoperability of the Libraries' various systems.

3. Next Meeting

The next meeting will be held September 15th at 2pm in the University Librarian's Conference Room. Agenda items will include a discussion of next steps for discovery (i.e., whether to proceed with existing plans or start from scratch) and a review of the coded LibQual comments.

Meeting was adjourned at 4:35pm
Submitted by Joseph Deodato