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Implementing a Discovery Tool Options, Experiences, Expectations

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Today's agenda



Part 1: General questions

Part 2: Experiences made in Jena

Main idea: Single point of entry



digitalos	Cinale Consell	Cushan
digitales thüringen	Single Search Erweiterte Suche Suchtipps	Suchen

Brief history



1798	Goethe had Idea of discovery search
1900	First cataloging rules
1970s	Library unions
1980s	Integrated library systems (ILS)
1990s	Online catalogs & search engines
2000	Meta and federated search
2007	Discovery search as a next generation catalog?



What is a discovery system? Why a discovery tool? What is included? How is content integrated? How does it work?



What is a discovery system?

- Tool which searches quickly through a huge amount of content
- Unified index + discovery layer interface
- Provides relavance ranked results (Google-like)

Why a discovery tool?

What is included?

How is content integrated?



What is a discovery system?

Why a discovery tool?

- Lots of different resources of information
- Wide range of platforms, to many search entries
- Users should concentrate on topical research
- Classical OPAC is inadequate in Google age

What is included?

How is content integrated?



What is a discovery system?

Why a discovery tool?

What is included?

- Licensed and purchased materials (Journal articles, e-books ...)
- Open Access content (HathiTrust, DOAJ ...)
- Your own digital collections and related metadata
- Bibliographic records from your library

How is content integrated?



What is a discovery system?

Why a discovery tool?

What is included?

How is content integrated?

- Publishers provide full text content & metadata
- Data related to your local holdings is loaded into the index
- You do not automatically have free access to full text content



What is a discovery dystem?

Why a discovery tool?

What is included?

How is content integrated?

- Vendors need to get permission from each publisher to create a unified index, index must be subscribed
- Content from various sources is "normalized"
- Interface is hosted by the vendor, some allow local interfaces

Vendors: The big four



- EBSCO Discovery Service
- Primo Central (Ex Libris)
- Summon (Serials Solution)
- WorldCat Discovery Service (OCLC)

Today's agenda



Part 2:

Experiences made in Jena

ThULB Jena – Where is it located?





Jena ("City of Light") – about 100.000 inhabitants

ThULB Jena - How does it look like?





ThULB Jena: Main library building / branch library for Humanities

About us ...



ThULB Jena

- → Foundation: 1502 as Saxonian-Electoral library
- → Thuringian University and State Library
- → Library of the Friedrich-Schiller-University of Jena
- → 4 Branch libraries

Some facts (2013):

- → About 4 Mio. physical holdings including historical collections
- → E-Journals: about 30.000 titles
- → Databases: about 1.700
- → E-Books (yearly increase: about 30.000 titles)
- → Repositories: 4,3 Mio. digital copies
- → About 46.000 active users + ca. 1 Mio. visitors on UrMEL per year

About Summon



- Provider: Serials Solution
- Integrates full text and metadata from different resources into a unified index (pre harvested content)
- Harmonizes metadata by matching und merging



- Content scope: about 1.2 billions records
- Catalog records + e-resources (e-books, journals articles ...)
- Provides discovery key features (single search box, facets ...)

Why Summon?



Why did we choose Summon?

- Two ways of implementation possible
 - → Out-of-the-box (all data is hosted by the vendor, usage via Summon interface)
 - → Open for in-house development (flexible API)
- Active community of Summon users in Germany (UL Konstanz, UL Heidelberg, HSU Hamburg, UL Lüneburg ...)
- Supported by Serials Solutions (developer Team)
- Cost-benefit-ratio is right
- Best choice for Jena



Implementation timeline



- Fall 2011/12: Evaluation and licensing
- January 2012: Begin of start-up phase
- Fall 2012: Teaching library staff
- > **December 2012:** Activation of a betaversion for e-resources

Start-up phase



- 1. Activating licensed sources via Summon knowledgebase
- 2. Loading records from the union catalog
- 3. Harvesting content from institutional repositories and ingesting it into the index
- 4. Integrating the Summon index under VuFind and adapting the user interface
- Integrate linkresolver (OVID linksolver → 360 Link, configuration, update providers)
- 6. Prepare a concept for staff teaching

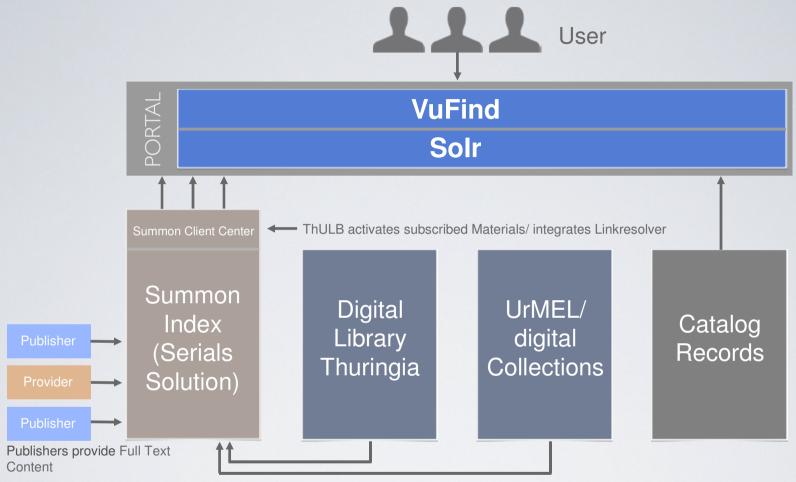
VuFind



Why did we decide to integrate VuFind as a user interface during our start up-phase?

- + Available knowhow at the library union (VuFind service of VZG)
- + Existing in-house developments (<u>www.digitalesthüringen.de</u>)
- + Certain features fit local requirements better (realtime status calls to provide call number, circulation status ...)
- + Becoming more independent from the vendor
- Keep system up-to-date (current expenditure in maintainance, hardware, software, staff)
- Start up-phase clearly longer



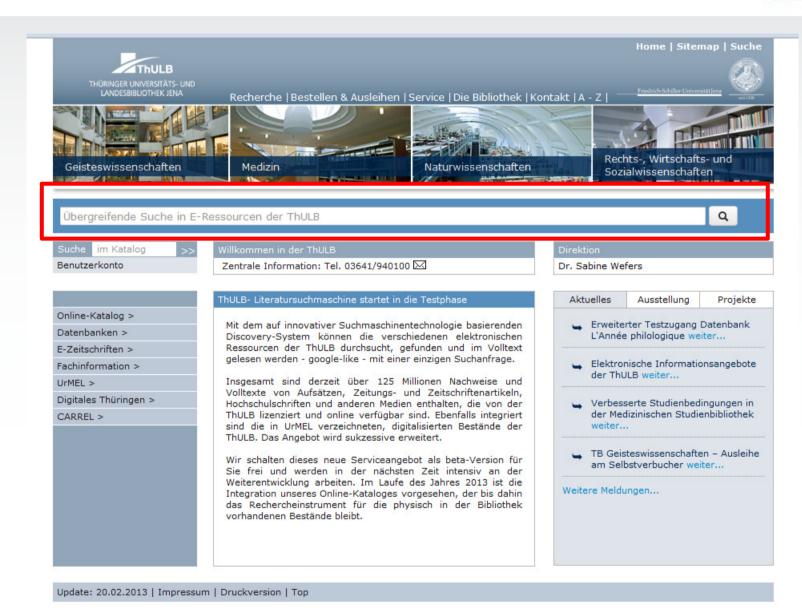


ThULB integrates Materials into the Summon Index (via OAI)

ThULB purchases Media

ThULB web site





VuFind search results



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Full record display



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Verfügbare Links zu	V-llaura

Suchgeschichte Suchtipps

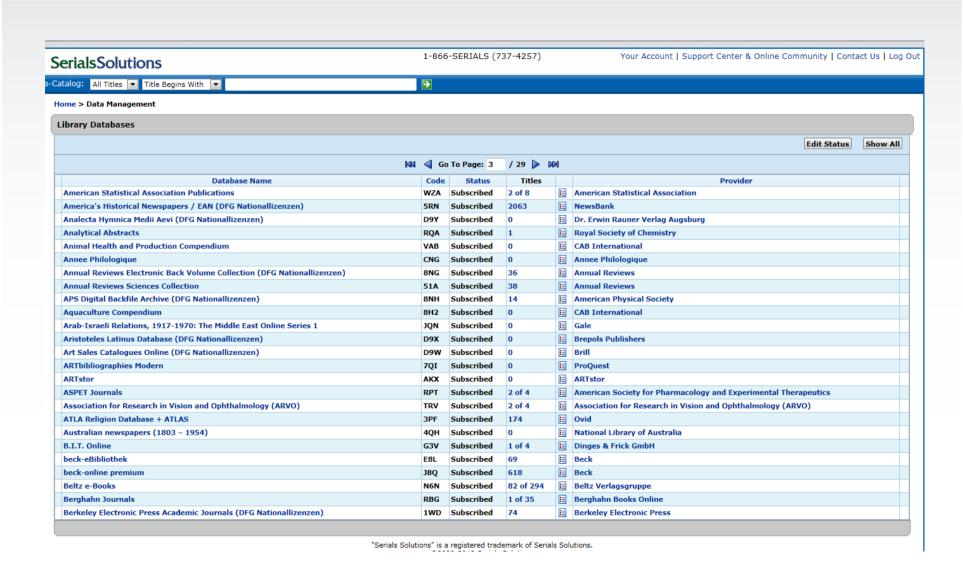
SUMMON LINK

Volltext

Online-Katalog ThULB Datenbanken E-Zeitschriften

Summon client center





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Summon in the acquisition process



Acquisition

- Subscription of databases, e-journals, e-books
- Purchase of print media

ILS

 Purchased media are catalogued (CBS, ZDB, EZB) and registered in the acquisition modul (ACQ) -> linkresolver is integrated

Summon client center

 Licenses of subscribed resources are activated in the Summon client center

Supply

Metadata and fulltext linking via ThULBSearch searchable

Where do we stand at the moment?

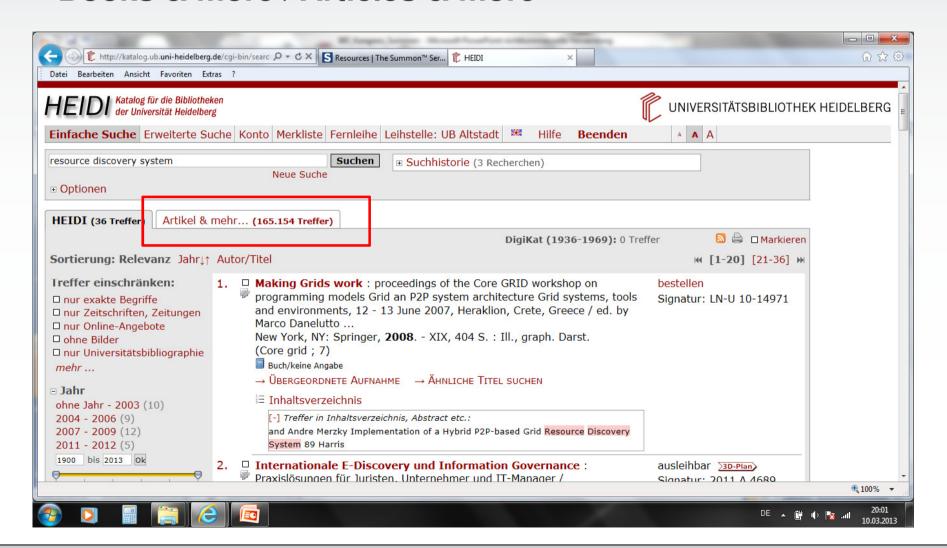


- Total records findable via "ThULB Search": 216.600 titles
- E-Journal: 132.669 titles (= 56 Mio. articles!)
- E-books / fulltexts: 115.411 titles
- Databases: 721
- Ingestion of our own digital collections (UrMEL)
- Todo: Catalog records → two column search box (Books & More / Articles & More)
- Todo: Relaunch of ThULB website

Example: UL of Heidelberg



Books & more / Articles & more



Things we are concerned of ...



- Summon index does not cover 100% of our resources
- Known item search is sometimes not satisfying
- Floods of information
- What shall we do with our catalog? Our A-Z database list? Our electronic journal list?
- Where does discovery search end?
- How will we finance this confronting tighten budgets?

Looking forward



- Single search box is implemented
- Users have one entry, not lots of databases, catalog
- It works fast, almost like Google
- Interdisciplinary research is supported
- Acceptance of "ThULBSearch" is increasing
- We've learned a lot about VuFind

And: Library staff has learned a lot from each other!



Thank you very much for your attention!

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