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Discover EDS: Tales of Implementation and Use

Audrey Powers

Lily Todorinova

Shannon E. Fox

Athena Hoeppepner

University of Central Florida, athena@ucf.edu



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Discover EDS: Tales of Implementation and Use

Audrey Powers

University of South Florida, apowers@usf.edu

Lily Todorinova

University of South Florida, lily.todorinova@rutgers.edu

Shannon E. Fox

Austin College, sfox@austincollege.edu

Athena Hoeppner

University of Central Florida, athena@ucf.edu

Mary Page

University of Central Florida, Mary.Page@ucf.edu

See next page for additional authors

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Presenter Information

Audrey Powers, Lily Todorinova, Shannon E. Fox, Athena Hoeppner, Mary Page, Rafal Kasprowski, Elizabeth Kocevar-Weidinger, Alyssa Koclanes, Virginia Polley, and Robb M. Waltner

Discover EDS: Tales of Implementation and Use

Audrey Powers, Associate Librarian, University of South Florida

Lily Todorinova, Academic Services Librarian, University of South Florida

Shannon E. Fox, Coordinator of Electronic Services and Collections, Austin College

Athena Hoeppner, Electronic Resources Librarian, University of Central Florida

Mary Page, Associate Director for Collections and Technical Services, University of Central Florida

Rafal Kasprowski, Electronic Resources Librarian, Rice University

Elizabeth Kocevar-Weidinger, Head of Instruction and Research Services, Longwood University

Alyssa Koclanes, Instructional and Technical Services Librarian, Eckerd College

Virginia Polley, Information Literacy Librarian, Stevenson University

Robb Waltner, Head of Acquisitions, University of North Florida

Abstract

This paper supplements the panel, which was delivered in a “Lively Lunch” format and included presentations by librarians who have employed EBSCO’s Discovery System (EDS) in their academic institutions. The panelists addressed several important aspects of launching a discovery system in an academic library, such as Implementation; Information Literacy; and Assessment, Usability and Customization. The implementation component included technical aspects, business requirements, enhancing the operability of link resolvers, launch preparation, and implementation success. The information literacy portion addressed how academic reference services and library instruction have been transformed because of EDS. Assessment, Usability and Customization focused on customizing the search box and assessing EDS using statistics and usability testing. Michael Gorrell, Executive Vice President of Technology and Chief Information Officer of EBSCO Publishing, was present, and a Q&A time was scheduled at the end of each session for audience members to ask questions, comment, and share experiences.

The implementation process of a Discovery Service involves many different aspects and is a large undertaking for any library. Depending on the size of the library, its technology infrastructure, and the number of staff involved, the implementation time can vary greatly. In addition, the planning processes and the considerations made prior to implementation are also affected by the nature and needs of end-users in these institutions. Selecting the resources to include in the discovery service, resolving technical issues, developing a strategy to publicize and market to end-users, and assessing and customizing the product are all part of a continuous course of implementing Discovery Services—a process that begins long before implementation and has no fixed completion. This process involves a collaborative and consorted effort from all areas of librarian expertise, from technical services to public services. The simplicity and comprehensiveness of discovery tools redefine how libraries deliver services across the board, changing the expectations users have of the experience of searching library resources and challenging librarians to redesign instruction and teach information literacy in new ways.

These considerations and our own experience with implementing EBSCO’s Discovery System (EDS) at the University of South Florida prompted us to open up a discussion across university and college libraries in the U.S. and across librarian functions, technical, and public services, in order to share, discuss, and learn from each other the lessons of Discovery Service implementation and use. We wanted to focus on the continuous nature of this process, involving the user perspective, as well as the perspective of the vendor, EBSCO. We believe that talking with our colleagues and collaborating with publishers makes us much better positioned to anticipate the changing needs of users and enhance the experience, accessibility, and discoverability of library content.

Implementation—Technical Aspects

University of Central Florida

Athena Hoepfner, Electronic Resources Librarian

University of Central Florida (UCF) Libraries' experience with EDS reveals some of the complexities of implementing a discovery service. First, EDS uses questionnaires to gather input from the library to customize the pre-harvested EDS index. This index is the core of web-scale discovery. It incorporates metadata from the subscription database, open-access sources, e-journals, and e-books. Exactly which resources are incorporated is based on several factors:

- The licenses between the discovery service and the content/database vendor;
- The library's subscribed and owned content;
- Selections made by the library during implementation.

The first two factors can be investigated during the discovery service selection phase and may heavily influence which service a library chooses. For example, UCF is a strong EBSCOhost customer. By selecting EDS we are able to easily include all our EBSCOhost data in our instance of the discovery tool. The third factor involves some philosophical questions about the purpose and audience for the EDS system.

Reviewing and selecting the content to include can be daunting. The list of available data sources can be long and full of unfamiliar collections. EBSCO asks libraries to fill out a Content Questionnaire to indicate what should or should not be included in the index. The questionnaire presented to UCF was in the form of a long, unsortable spreadsheet. The process was unpleasant and inefficient. Often, the implications of selecting a title to be included or excluded in a collection were unclear. For example, would including a JSTOR collection mean that the article citation data would be included, that the full text would be indexed, or would it mean some link to full text would be presented?

Once the initial index is built, libraries can control database selections in EBSCO Admin, turning collections on and off. For librarians already familiar with EBSCO Admin, this process is far more pleasant than the initial questionnaire. Finally, incorporating the library catalog and local collections requires coordination between the EDS system, the Library Management System (LMS), and Institutional Repository (IR). Configuring that coordination involves digging into the particulars of MARC, location codes, item holdings records, and many other things bound to confound and confuse an electronic resources librarian with a public services background.

In conjunction with selecting licensed and free data to include, libraries must decide which of their local data sets to incorporate, describe in technical detail the format of the data, describe how it can be harvested, and how often. UCF, like most libraries, chose to load our catalog MARC and our digital collections data. To gather the necessary specifics, EBSCO asked UCF to complete more questionnaires. Like the Content Questionnaire, the Cataloging and Institutional Repository Questionnaires were detailed, and the implications of choices were not fully clear. The librarians tackling these questionnaires should be very familiar with the specifics of the LMS or repositories, the data formats, and the options available for exporting the data.

Eckerd College

Alyssa Koclanes, Instructional and Technical Services Librarian

The implementation process at the Eckerd College Library in St. Petersburg, Florida, took just over 4 months, from July 1, 2011, to October 31, 2012, when we added EDS to the library website for a 3-month beta period. Continued customization and product trouble shooting occurred during the 3-month beta period before the live release of the product as the default search on the library homepage on February 1, 2012. With a small staff of five librarians, including the library director, the implementation of a discovery system added considerably to the workload of all the librarians, particularly the electronic and technical services

librarians who worked together to oversee and lead the implementation process.

There are several key components of the implementation process of EBSCO Discovery Service that are paramount to the success of the product. At our institution, all of the librarians were very clear on the main expectation for the discovery service which helped guide us through both the initial discovery selection process and the implementation process of EDS. As an institution that previously did not have a link-resolver or a federated search engine, it was a cumbersome and difficult process for our students to locate full-text articles before we implemented EDS. Due to this difficulty, students were routinely turning to Google instead of using the libraries' resources. Therefore, our main goal and expectation as we began the implementation process was full-text access to scholarly content to be as clear and easy as possible for our students through EDS.

The first steps of the initial implementation of EDS involved the library submitting the Custom Catalog Questionnaire, Customization and Branding Questionnaire, and the Content Questionnaire to their assigned EBSCO discovery solutions coordinator. Once these questionnaires were completed, EBSCO started the process of creating and customizing the EDS profile for the library. Completing the questionnaires with as much information as possible beforehand greatly impacted the speed at which the implementation process can occur. The most detailed part of this process was completing the Custom Catalog Questionnaire and submitting the MARC data to EBSCO in order to create a custom catalog database. Some of the specific parts of the custom catalog creation process include providing a z39.50 server to EBSCO for real time availability of the catalog records, specifying how an e-book or audio book record can be identified for the icon display, and whether links from the catalog records should be displayed on the results list. The Integrated Library System, Ex Libris Voyager, used by the Eckerd College Library works well with EDS, but there were a few irregularities that arose during the implementation that had to be worked

out in order for the catalog data to display correctly in EDS.

After the questionnaires were returned to EBSCO, a catalog database was completed and the profile was created according to the libraries' preferences. For Eckerd College, another part of the implementation process was to set up EBSCO A-to-Z with LinkSource. This part of the implementation process turned out to be almost as detailed and time consuming as the implementation of EDS itself, as we not only needed to make sure the EBSCO LinkSource custom link would be displayed correctly within EDS for content where the full text was accessed elsewhere, but custom links in LinkSource needed to be created and tested as well. As we learned during the process, we were essentially creating two new systems at the same time, which contributed to the amount of time the implementation process took for our library.

Once the LinkSource custom link was set up within EDS, there were still decisions as to which other direct custom links to other database content we wanted to include in EDS. Since our main goal for EDS was for students to be able to find the full text of scholarly content as efficiently as possible, we chose to also include direct custom links to content we have access to whenever possible. In an effort to make access to the full text easy and efficient for our users, we choose to use the same naming conventions for all full-text links, including our LinkSource custom link. For example, our custom link for JSTOR content is listed as "Full Text from JSTOR" and our LinkSource custom link is "Full Text from Eckerd." During the implementation process, we made the decision that only one custom link for full text would be displayed for each record. We wanted the LinkSource custom links to display only if that was the only way to access the full text, otherwise the direct content custom links would display first. If we have no full-text access to an item, then the only custom link we chose to display was the "Interlibrary Loan Request" link. It was only through continued librarian testing and working with EBSCO Support throughout the implementation process to set up our custom linking in this manner.

It is important to note that for our institution, the majority of the customizations made to our EDS profile occurred during the implementation stage. Once the custom catalog database was created and viewable in EDS, we began a considerable amount of librarian testing of the product to make sure the product was working as we intended it to work for our users. This was the key to a successful implementation process for us, since we were able to send questions and make changes directly with our discovery solutions coordinator. This allows the librarians the opportunity to really understand how EDS works and to make requests for settings the library would prefer. While not all of the requests we made could be implemented at the time, we were able to create enhancement requests and be added to existing enhancement requests for future updates of EDS. In less than a year since we fully implemented EDS, we have already seen several of these enhancement requests come to fruition during subsequent releases of EDS. By performing continued and rigorous testing of the product during the implementation process, we were able to ensure that all aspects of EDS were working correctly.

Another benefit of continued testing during the implementation process enabled us to understand how the differences between customization choices have an immense impact on the way the product functions. Several choices for how we set up our EDS profile were made during the implementation process due to the large amount of librarian testing. In accordance with our goal to provide students with easier access to full text articles, we choose to implement the default search parameters to limit to full-text articles and the library catalog. Resources only available via Interlibrary Loan are not displayed in a default search unless the "Full Text Articles & Library Catalog" limiter box is unchecked. As evidenced by the librarian testing during the implementation process, limiting the initial search results in this way still provides our users with a vast amount of results and meets their expectations for full-text access. As our library only serves undergraduate students, this choice works well for our population based on the type of research the majority of our users are doing.

University of North Florida

Robb Waltner, Head of Acquisitions

The University of North Florida's Thomas G. Carpenter Library in Jacksonville, Florida, developed business requirements that were used to evaluate and select a web-scale discovery system and to guide our implementation. Business requirements essentially answer the question: How will you measure whether the service you are providing is successful or not? After evaluating the complex nature of web-scale discovery systems, it was pretty remarkable that what we wanted the system to do boiled down to just seven key requirements:

- Business Requirements
 - Ability to combine facets
 - Available in/outside the Library option
 - Good quality search results
 - Matching of the meta-index to our current investment in e-resources.
 - Obvious links to full-text in the results
 - Links which actually resolve to full text
 - Reports

After selecting EDS as the system which best fit these business requirements, we had only 6 weeks to prepare for a Fall semester launch. Our first step was to ask EBSCO to prepare an EDS implementation configured with our metadata and LinkSource resources. This was viewed as a "pilot" of the installation. In the meantime, librarians attended training and reviewed documentation related to system administration. In addition to implementing EDS, we also changed to EBSCO's LinkSource link resolver and implemented EBSCO's A-to-Z product.

Upon testing the pilot, the library's implementation team decided to go a bit further in configuring the system:

- We decided to add additional EBSCO databases. We especially liked EBSCO's ability to "smartlink" citations to full-text. This provided PDF links directly below many

citations without requiring the user to access the link resolver.

- We decided to have EBSCO manage more of our large e-journal packages. We found that one of EBSCO's strengths was that when they knew what we were subscribing to, they could automate certain activities in the A-to-Z e-journal portal. We wanted to take advantage of these efficiencies.
- Finally, we created a "customlink" to our Illiad service so if users found a citation in EDS which was not full-text, the citation could be "pushed" to Interlibrary Loan. This was fairly easy to accomplish because EBSCO provided canned examples to assist with the creation of links to interlibrary loan services.

Rice University

Rafal Kasprowski, Electronic Resources Librarian

The EBSCOhost CustomLinks feature offers certain advantages over OpenURL linking when used in conjunction with the EBSCO Discovery Service (EDS) Partner Databases as well as with OCLC's freely available WorldCat Local "quick start" service. The latter is customized and branded locally by Rice University and used as an intermediary to augment the metadata available for linking from EDS to the desired item when not enough metadata is available in the EDS record alone for OpenURL linking to work effectively.

CustomLinks to EDS Partner Databases

EDS offers three broad categories of linking options: native full texts from EBSCOhost databases, OpenURL links, and Custom Links. Native EBSCOhost full texts come in HTML and PDF formats and are labeled as such. SmartLinks are another type of native full text; these links appear when a record does not have a full text in the EBSCOhost database being searched, but resides in another EBSCOhost database available to the library.

EDS is compatible not only with the EBSCO link resolver, but also with resolvers from other OpenURL vendors. In OpenURL linking, the link

resolver checks the library's online holdings knowledge base, usually its online journal and books manager, also known as the A-Z list, and links to the items that match the library's full-text holdings. OpenURL is an open linking standard that has been adopted by a large number of content providers. It relies on dynamic linking accomplished at the moment of the request. OpenURL links may not resolve all the way to the online full text if, for example, the library does not hold the desired item or metadata formats differ between the citation source and full-text provider. If it receives insufficient metadata from the source citation, the link resolver will not work at all, that is not even produce the service page with all the usual linking options, including to the library's holdings and interlibrary loan (ILL) service.

CustomLinks are an alternative to OpenURL links. The most common CustomLinks are ready full-text links, built according to the proprietary static linking syntax specific to each content provider. EBSCO has created CustomLinks for several content providers and continues to build more. Libraries using EDS can follow the EDS Partners listserv for additions. The EDS Content Questionnaire makes the current list of EDS Partner Databases available to EDS libraries. These include JSTOR, LexisNexis, NewsBank, OALster, arXiv, ScienceDirect, and several more, as well as abstracting and indexing resources such as ThomsonReuters' Web of Science, which provides a citation index service. In some cases, it is possible to limit these links to certain subsets of databases, for example, JSTOR Arts & Sciences III collection or the Oxford Handbooks Online collection. Libraries can also create their own EDS Custom Links via the EBSCOhost administrative module. As explained in the EDS Questionnaire help section, the following are the usual advantages of using Custom Links to EDS Partner Databases: (1) fewer clicks to reach the desired item ; (2) greater reliability compared to OpenURL linking, as OpenURL involves another layer in the process (in the form of the link resolver); and (3) opportunity to promote external content, as the link text uses by default the name of each publisher the library is providing access to in this way.

Not all situations where linking to full texts is needed lend themselves to linking via OpenURL or CustomLinks to EDS Partner Databases. In certain situations CustomLinks may be appropriate to link to the desired items indirectly.

Records in EDS Incompatible with OpenURL for Lack of Key Metadata

EBSCO enriches EDS content with datasets from various providers that are included in EDS in addition to the library's catalog, institutional repository, and EBSCO's own databases. Many of the records in some of these datasets are duplicates of local catalog records. These records describe documents in a multitude of formats, but some of them, such as for monographic, audio, or video material, do not have enough metadata to make OpenURL links resolve properly, not even to the resolver service page, let alone the content provider. CustomLinks to the appropriate EDS Partner Databases are not available for any of these records to circumvent the problem.

What solutions could one adopt for these types of databases and their records to ensure the best user experience, while avoiding dead ends and manual data entry or correction as much as possible? Instead of the OpenURL link, one could add an ILL link directly at the search result level. However, because of the lack of complete metadata from the EDS record, users would have to enter the missing data manually. Moreover, without a mechanism for checking local availability, if the document delivery staff discovered the item was locally available after all, the interlibrary loan request would be denied, resulting in a loss of time for the user.

Removing third-party databases, many of which contain duplicates with respect to the records imported from the local catalog, also presents drawbacks. Parsing through the "good" and "bad" databases is time-consuming and the resulting all-or-nothing decision regarding the database records cannot be very precise. Libraries run the risk of removing many valuable records, just because a certain number of them have insufficient metadata for direct full-text linking. EBSCO may also change these databases in a way that makes them more useful, in which case local

EDS administrators would have to keep track of the databases they removed, remember to recheck the databases for improvements, and put them back—all demanding much more time and additional management tasks.

In fact, these third-party databases in EDS present certain advantages. Generally, they broaden discovery, as not all the records they contain are duplicates of a library's catalog records. Even duplicate records may not have exactly identical metadata. For instance, one book record may have chapter information, while another may not, so that a search for a corresponding chapter will yield the first record but not the latter. Even if the third-party record is an exact duplicate of a catalog record, it is present in EDS before the identical record from the library's catalog is ever loaded in EDS, which depending on the loading schedule used may be delayed by days, weeks, even months. If a CustomLink leading to the library's catalog record could be created, then the library would offer real time access to what is essentially its own content in EDS when the library's catalog records have not been loaded yet into EDS. Could it also still be possible to check local availability of online items for these EDS records with poor metadata?

Customlinks Used in Conjunction with Worldcat Local "Quick Start"

It may be possible to "outsource" the necessary metadata by linking to the same records in a dataset with rich metadata and then linking from these intermediary records, which contain sufficient metadata, to reach the desired record via OpenURL linking, for example. A knowledge base that makes this workaround possible is OCLC's WorldCat Local "quick start," a freely available version of WorldCat Local, that is helpful in this case if the library has been sharing its catalog content with OCLC, which is true for a large number of academic and public libraries in North America, including Rice University. Participating libraries update their library holdings with WorldCat using the OCLC Connexion tool every time a new item is ordered or cataloged (virtually real time) or at a defined schedule when dealing with a book vendor, for example. With WorldCat Local "quick start," every participating

library can create its own localized version of WorldCat (e.g., rice.worldcat.org), apply its institutional branding, and personalize links to improve the user experience.

WorldCat meets the metadata requirements in two ways. First, it can directly display the library's local catalog holdings and availability status via OCLC number matching between the library's catalog record and the same record in WorldCat. Second, WorldCat can display OpenURL links when the OCLC number match is not possible. To WorldCat this simply means that the library does not hold the item; the corresponding setting is "For items not held by your institution." But it could just mean that the library has not performed an OCLC number reclamation project to make sure its OCLC numbers are the same OCLC is currently using. Whatever the reason, the rich metadata in the WorldCat record increases the chances of the OpenURL service reaching the resolver service page, from where users can link to the desired item in the catalog or run an interlibrary loan request. Should the library have the item online, users could link directly to that version with the OpenURL service.

Rice University has used WorldCat Local "quick start" in the following situation. For every record that does not come from the local catalog or institutional repository, unique CustomLinks are created when the "Publication Type" or "Document Type" fields are Audio, Book, Book Article, Book Chapter, Book Collection, Motion picture, Music Score, or Videorecording. These CustomLinks, labeled "Check for availability," run a title and author search within a WorldCat keyword query: <http://rice.worldcat.org/search?q=title+author>. Testing different queries has shown that this particular query provides a fairly unrestricted search within WorldCat, while being specific enough to normally rank the desired results at the top or closer to the top of the results list than other queries. The user selects the desired result and reaches the detailed record page in the localized version of WorldCat. If an OCLC number match is established as described above, the library's holdings and availability status are displayed on this detailed record page. Otherwise, the link resolver button is displayed

prompting users to continue their search. The rest of the search is executed with the rich metadata from WorldCat now accompanying the record. If the item is still not available to users locally, they can select the ILL link from the resolver menu page, whereby the ILL form is automatically populated, also with the metadata from the WorldCat record. Whether the item is available at the library or needs to be requested through ILL, the user should not encounter any dead ends and should obtain the desired item without having to add or change missing metadata manually.

Linking from EDS using a CustomLink to run a title-and-author search in WorldCat does not always work. For example, titles may be contaminated by extraneous information, such as editor (e.g., "... / edited by ...") or format (e.g., "... [sound recording]..."), or the book author instead of the book chapter author may be provided with a book chapter title search, because EDS does not provide separate author information for book chapters. Either case may result in a mismatch and yield no results in WorldCat. Mismatches in scripts, between Latin and CJK, for example, can also yield no results, although the corresponding record may exist in WorldCat. Some of these problems can be mediated by modifying CustomLink specifications at the field level. For instance, if monographic records (book, book article, book chapter) contain a DOI field then the OpenURL link should be reinstated, because records containing DOIs also appear to contain a sufficient amount of other metadata enabling the resolver to produce its service page. In all working situations, users have to execute multiple clicks to get to the desired item, especially if users can only locate the item in the catalog going all the way through the resolver service page. As illustrated in Figure 1, the usual number of clicks ranges between two and four; two if the library's holdings can be displayed in the WorldCat Local detailed record, and up to four if the search needs to continue with the OpenURL link, labeled "Check all availabilities at Rice here."

CustomLinks used in conjunction with WorldCat Local "quick start" effectively provide the desired item in the majority of cases for EDS records with deficient metadata, while the localized branding

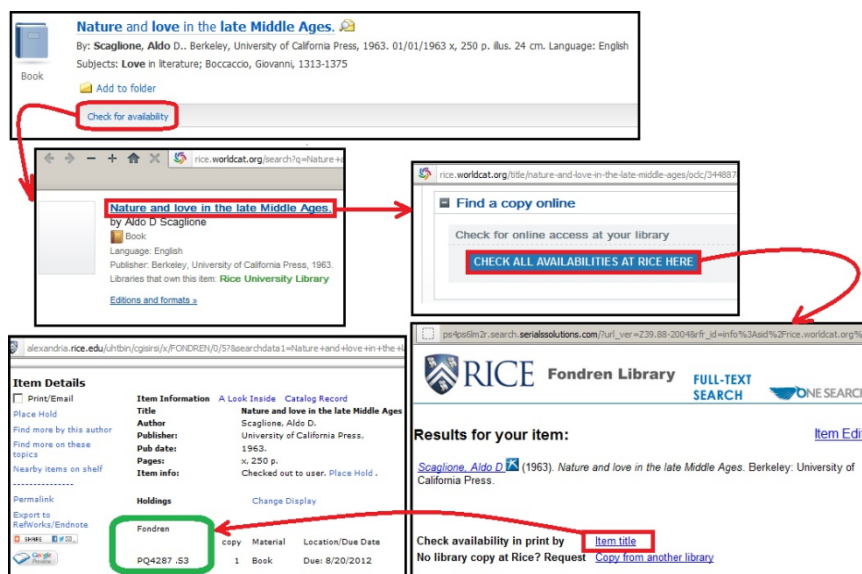


Figure 1. Item-Level Linking from EDS Using Worldcat as Intermediary Platform

in WorldCat assures users that they are always navigating in a research environment supported by Rice University. For the subset of records concerned, solving the linking problems discussed above at the metadata field-level appears to present a greater degree of efficiency, adaptability, and precision than removing third-party databases from EDS, a process that seems to diminish discovery compared to the method possible with CustomLinks. Additional research could be performed to quantify the success rate of item-level linking using this method.

University of Central Florida

Mary Page, Associate Director for Collections and Technical Services

At the University of Central Florida (UCF) in Orlando, Florida, many of our public services colleagues were enthusiastic supporters of the implementation of a discovery tool and were key members of the planning and implementation teams. Some librarians, however, did not think this project was viable. Some of the reasons provided included a concern that we are "dumbing down" the catalog, that the product does not index everything, and that serious researchers needed to use the specialized search features of the native databases. Although some of these concerns could be valid, we believed that the benefits of a discovery tool can outweigh the negatives. Here are some of the points that we

stressed during the planning and implementation process in order to ensure "buy-in" from Public Services Librarians.

The primary target for the discovery tool is the undergraduate who, for example, is in her dorm, needs three peer-reviewed papers, and has no idea how to start. Discovery provides a simple, Google-like search experience. Sophisticated features allow the user to interact with the results to drill down to the needed information. Statistics from other academic libraries show dramatic increases in usage of the databases indexed in discovery, so we know that users are finding what they need.

Advanced researchers, on the other hand, often know the databases for their disciplines; they learn from colleagues, advisors, and librarians. A benefit for these researchers of a discovery tool is being able to find related information from other disciplines. Interdisciplinary research becomes possible and manageable. Advanced researchers can use discovery to find databases that relate to their field, and then continue searching in the native database.

One significant drawback to most discovery services is that, at this point in their development, they do not search all of the library's content. Competitors are reluctant to share data, and certain resources simply are not built for this kind of search tool (statistical sources, for example).

Librarians at UCF were rightly concerned about this issue. To partially address what was not included in discovery, public services librarians created a LibGuide that graphically explains the limitations of discovery (Figure 2 and Figure 3).

We involved the public services librarians in the implementation and planning for discovery from the start. These librarians became ambassadors for the new service, primarily because they had credibility and understood the issues from a service point of view. We also encouraged all librarians to test, test, and re-test the system, and we actively solicited their feedback. Feedback was compiled into a list that indicated the status of each issue. Also, public services librarians were included in conference calls with our vendor, as we tried to understand and fix the various issues.

By and large, our public services librarians have “bought-into” the discovery tool. It would be nice to say that 100% were active users, but that may

not be the case at this point. As we continue to work with the system and as our vendor introduces upgrades and new features, we are certain that all of our librarians will someday be convinced of its value.

Publicity: Soft-Launch or Full-Scale PR Campaign?

All along, it was our intent to develop a full-scale marketing campaign to introduce discovery to the campus. We planned on using digital signs, giveaways with the Discovery logo, and aggressively promoting the service to the campus community. As launch day drew closer, the system still had enough bugs that were of concern to the librarians, and we decided to do a soft-launch instead. The new search box and logo (Figure 4) were prominently placed on the home page with the word *beta*, for good measure. Some people believe that all online tools should be in “perpetual beta” status. For our part, we intend to

OneSearch includes:

- UCF Libraries Catalog
- UCF Digital Collections
- Full text journals
- Full text e-books
- Full text newspapers and magazines
- *Many* databases on a range of subjects

OneSearch *does not*:

- search every library database
- search the library web pages
- search the open Internet

University of Central Florida OneSearch LibGuide

Figure 2. University of Central Florida OneSearch LibGuide



Figure 3. University of Central Florida OneSearch LibGuide



Figure 4. University of Central Florida Discovery Search Box

continually tweak the discovery tool, as we learn from our users, add new content, and improve the system. We may choose to remain in perpetual beta, as well.

Is the discovery tool a success? It's hard to tell at this point, since we have only been "live" for a few weeks. Statistics indicate that the system is heavily used, but we do not yet have a context or critical mass to make a valid judgment. At the end of the semester, comparisons will be made between usage of individual databases now and at the same time last year. We would also like to do

a quick online survey of users and then perhaps a more formal survey.

Information Literacy and the User Perspective

Longwood University

Elizabeth Kocavar-Weidinger, Instruction/Reference/Interim E-resources Services

In this section, I will detail how I have used EDS in my information literacy sessions at Longwood

University in Farmville, Virginia. To be information literate as defined by the Association of College and Research Libraries, students should be able to “recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information” (ACRL, 2000). Before the “Googlization” of information, I spent most of my instructional time with students focusing on the ability to “locate the needed information” for which one single research question may have multiple access points to find answers. I believe that researching questions rather than topics is a more effective method to find relevant information. Whether it was the card catalog and print indexes or the online catalog and electronic indexes, students spent most of their time learning how to use these tools to find information. Students needed to know what the access points were and how to use them. Biological Abstracts in print was a particular challenge for me to teach. After students learned how to find citations through these tools, they then had to learn how to find the actual item. The Googlization of the library’s finding tools via discovery services now allows me to teach the “evaluation and effective use” of information as the focal point of my instruction, rather than concepts I hoped to get to after the how’s. Because I do not spend my time on how to use multiple interfaces, all with unique “bells and whistles,” I am now able to teach why.

I begin instruction sections using a constructivist model of building on what students know. They know how to use Google. Our EBSCO discovery tool, OneSearch, mimics that real world experience. Use one search box, search (almost) everything, and limit by format options on the left. Students know how to search Google; they transfer those skills and use OneSearch to find the Library’s holdings.

Students develop a set of research questions, cast their net wide in OneSearch, and limit to a format that has the best chance of providing an answer. My time is now spent on why one uses books, scholarly journals, (“Just what is a scholarly journal?”), magazines, newspapers, Google, etc. I have more opportunities to design instruction, which allows students to discover that it is not

reasonable to find yesterday’s surfing scores in last week’s *Surfer Magazine*. They discover why it is important to limit by format.

In addition to the why’s of format, students may quickly browse the list of all databases searched to quickly view the multi-disciplinary lenses of their research question. Students explore why it is important to look at a question from different disciplinary or interdisciplinary lenses without the how-to of using multiple interfaces. For the research question, “why do people surf?”, there may be a religious, cultural or athletic lens. OneSearch quickly provides a glimpse into all relevant lenses (granted, students may not know what “JSTOR” and/or “CINAHL” mean, but it’s a beginning). Because I do not teach the how-to of multiple access points, I can provide more opportunities for students to evaluate the needed information from multiple disciplines.

Finally, students create accounts, store all of their citations and create style-specific citations. In this process, because we are not creating multiple accounts and making citations by style is relatively simple in EDS, we can spend more time on *why* to cite or “use effectively the needed information.”

In conclusion, because of the simplicity and comprehensiveness of OneSearch, I am able to design instruction that more fully addresses the latter two criteria of information literacy as defined by ACRL. In addition, I believe that the *why* of “evaluating and using the needed information” lends itself to student learning experiences that are rich in critical thinking and problem solving. Attainment of all of these skills better prepares our students for real-world research experiences after graduation.

Stevenson University

Virginia Polley, Information Literacy Librarian

In spring 2012, librarians in Stevenson University (SU) in Lutherville-Timonium, Maryland, decided to roll out EDS (locally called OneSearch) very quietly, having acquired the product as the result of a purchase by the Maryland Interlibrary Consortium, a group made up of SU and four other

regional college libraries. Although EDS was now available to our users, we did very little to publicize it. Since we were still in the implementation phase, we viewed it as a beta product. EDS access to our catalog still had major issues. We were still determining which customizations we would use. The interface, default settings, and other options changed regularly as we tested what would work best for us. As we debated, deliberated, and tweaked, we never lost sight of our goal to have EDS become our primary general search tool by the Fall 2012 semester.

The library has a standing agreement to teach a session in each freshman level introductory composition class (ENG 151), a graduation requirement for all students. Many departments have made instruction sessions with a librarian part of their curriculum, and we have developed relationships with many faculty members over the years. Although most of the classes we teach are one-shot sessions, at times we have had librarians embedded in courses to varying degrees.

During spring 2012 there were no requirements or expectations that the librarians would use OneSearch, either in class sessions or at the reference desk. Everyone was given time and space to become familiar with the product individually before using it as a teaching tool. We all knew, however, that OneSearch would be front and center in our fall 2012 ENG 151 sessions. As the Information Literacy Librarian at SU, it was up to me to take the first plunge into teaching with OneSearch.

I have worked for several years with a history research and writing course. The students, mainly sophomores, have a semester-long project that involves researching something related to their own family's history and requires them to access and use both primary and secondary sources. All these students have experienced class sessions with librarians, and many have sought personal assistance from a reference librarian. As I announced in class that I was going to introduce them to a new library research tool, they looked skeptical. I gave a brief explanation of what OneSearch was and how they could find many different types of sources all rolled into one set of

search results. After showing them where to access OneSearch, I turned them loose. It got very quiet. After a minute or so, I heard a quiet voice say, "Awesome," in a rather reverent tone. This group loved the one-stop shopping approach. There was audible enthusiasm as students found materials that would otherwise have meant searching our catalog, as well as multiple databases.

BIO 114, the first of a series of required lab classes for Biology majors, exposed some weaknesses of our OneSearch settings. Up to this point, we were still using "Search within full text" as a default setting. When students went looking for research articles related to their own lab projects, they became very frustrated by too many irrelevant results due to finding some search terms only being mentioned in passing, often widely separated from their other terms. This offered me the serendipitous opportunity to demonstrate our advanced search page and show them how to limit their search terms to a specific field, such as an abstract. After discussing this issue with my fellow librarians, we decided to make "Search within full text" an optional setting, not the default.

In these classes, I had been working with students who already had basic information literacy instruction and some experience using our library's resources. I knew in the fall I would be facing the uninitiated. While the majority of our ENG 151s are taught in the fall, spring sections are often made up of transfer students or students who needed a developmental writing course before qualifying for ENG 151.

I worked with two back-to-back sections, taught by the same instructor. I got the instructor's permission to use his students as my test group. I created a short exercise for the students that had them exploring a topic in OneSearch followed by three quick survey-type questions. I wanted to see how well the students would find their way through OneSearch on their own, so I gave the first group very little introduction. I modified the introduction for the second section based on questions that came up in the previous section. Most of the students were positive about their experience and said they would use OneSearch in

the future. Now it was time to get to work on planning how to incorporate OneSearch into all our ENG 151s in fall 2012.

Once summer arrived, we knew we were on the countdown to formally launching OneSearch. Over the summer, our homepage underwent a total transformation with a new OneSearch widget front and center. I concentrated on a plan for incorporating OneSearch into ENG 151. I looked at goals and objectives for ENG 151 instruction and created an exercise based on, but much improved from, the one I had used in my test ENG 151 sessions in the spring. We tested it on various potential users. Several made specific comments on how they thought the exercise could be improved. I got great feedback and edited the exercise into a draft to be reviewed by the instruction group.

In late July, I called a meeting of our six-member instruction librarian team. I had already sent out documents for them to review, including the list of potential goals and objectives for ENG 151 and the draft exercise. As librarians, we often feel an urge to cram everything we can into one session. We discussed and agreed on our objectives for what the students should be able to do at the end of the session:

- Perform a basic keyword search in OneSearch;
- Limit search results to items available through the Stevenson University Library;
- Sort search results by appropriate source types;
- Identify and apply alternate keywords by exploring abstracts and subject terms to refine their results.

Once we had our objectives set, we walked through a sample lesson. We discussed modeling a search and agreed on the most vital elements that needed to be included. We looked at the new exercise and gave everyone a chance to try it out on some sample topics.

Everyone left the meeting feeling more confident about the fall. There was general agreement that the meeting had done a lot to allay anxieties about teaching with a new resource. Having a

basic plan in place reduced the amount of prep time needed for each session and freed us to concentrate on the information literacy skills our students need.

Less than 2 weeks into the Fall semester I was teaching our first two ENG 151 classes. I briefly modeled a search for some basic navigational instruction, then handed out the exercise and turned the students loose to explore their topics. Our exercise begins with search terms being randomly assigned to each student. We have a pool of ten major topics, each of which has three subtopics ranging from “Baltimore baseball” to “vampires and popular culture.” Each topic has been vetted to ensure it will have appropriate results to complete the exercise.

After entering their search terms in OneSearch, the students are asked to perform a series of tasks and to answer questions. Among other tasks, they apply various limiters, sort their results, and explore item records to find more detailed information. Students select a book and identify its format, print or electronic. If it is print, they need to determine which libraries in our consortium own it. They choose a periodical article and access the full text. They refine their searches by adding terms found in abstracts or subjects, or they can use the Subjects facet to refine their results. Students also monitor how many results they get when they begin and what changes occur as they refine their searches. They often use words such as “narrower” or “more focused” to describe what happens when they refine their searches.

Students have been very receptive to the exercise. Some get quite involved with their topics and are surprisingly choosy when it comes to selecting the resources they use to answer the questions. They find OneSearch easy to use and not intimidating, although I hear occasional complaints that they get too many results to look at, which, to me, is a pleasant change from, “I’m not finding anything.”

OneSearch has been getting very positive comments from our librarians as well. While not all of the instruction librarians have taught an ENG 151 session yet this semester, all have used OneSearch in a classroom setting and one-on-one

with students at the reference desk. I have heard multiple remarks about how refreshing it is to not get bogged down in database mechanics, rather to simply move into working with results. The main complaints from librarians center on the link resolver shortcomings.

Faculty have been relatively quiet about OneSearch. Those who have encountered it when a librarian introduces it in a class are generally positive. They say it is a good thing for their students, although they have been less likely to say if they would use it in their own work. Some professors simply seem confused by it. We have discussed offering some faculty workshops to introduce them to OneSearch.

While I know there will be ups and downs in our instruction this semester, I look forward to continuing to teach with OneSearch. As we reflect on what we as librarians are learning this semester, we can build on and improve our instruction program. We are gathering student exercises from ENG 151 sessions that will be reviewed both for demonstrated student learning, as well as for ways to improve the exercise. I also plan to send a survey to the instruction librarians at the end of the semester to gather reactions and suggestions for strengthening our instruction.

Customization, Assessment, and Usability

Austin College

Shannon Fox, Coordinator of Electronic Collections

Abell Library Center at Austin College in Sherman, Texas, began implementing EBSCO's Discovery Service (EDS) in November 2011 and went live in February 2012. EBSCO offers many customizations with its discovery service, including tailored searching and linking. EBSCO's technical team was especially helpful by customizing an EDS search box for Abell Library. The search box offers various ways to explore the library's physical and online collections and offers a widget by which the user can navigate the library's in-house subject guides. Widgets were also added to the EDS search box for LinkSource and A-to-Z. Additionally, EBSCO offers a tool that was utilized

to create EDS subject-specific searches that were incorporated in each subject guide.

Abell Library's EDS implementation team's first strategy for incorporating a customized search box on the library's website involved examining the search boxes other institutions had installed on their websites. One favored search box is featured on the University of Georgia Libraries site. Once the team found such impressive examples considered appropriate to model Abell's upon, I communicated with EBSCO technical support on how Abell's search box should look. EBSCO's technical support subsequently created a search box that incorporates Austin College's official colors so that Abell Library's search box coordinates nicely with the library home page and with Austin College's website. My part in the search box creation primarily involved providing critical information that included credentials to test search Abell's EDS, OpenURL resolver, IP range, and proxy information. EBSCO technical support incorporated guest access into the search box so that users unaffiliated with Austin College would be enabled to explore Abell's collections in EDS without accessing full text resources.

The customized search box features the name "RooSearch" for Austin College's mascot, the kangaroo. The box contains five tabs (Figure 5). The initial tab focuses on a general EDS search. One can search by keyword, author, or title, and two limiters are immediately furnished within the widget: Full-text (Online) and Scholarly (Peer-Reviewed). Searching by any of these means moves one directly into the EDS product, simultaneously displaying content from many subscription databases the catalog. Once a user clicks on a full-text access link, he or she must authenticate with Austin College campus credentials. Abell Library uses OCLC's EZproxy authentication software, which is invoked to authenticate said user who then only needs to enter credentials one time. This allows for a seamless search experience. The second tab is "Articles" and is simply a RooSearch with a pre-coded search limiter for articles as an item type. An example search phrase would be: "King Arthur AND ZT Article." The third tab is "Books and More" and searches the catalog via RooSearch.

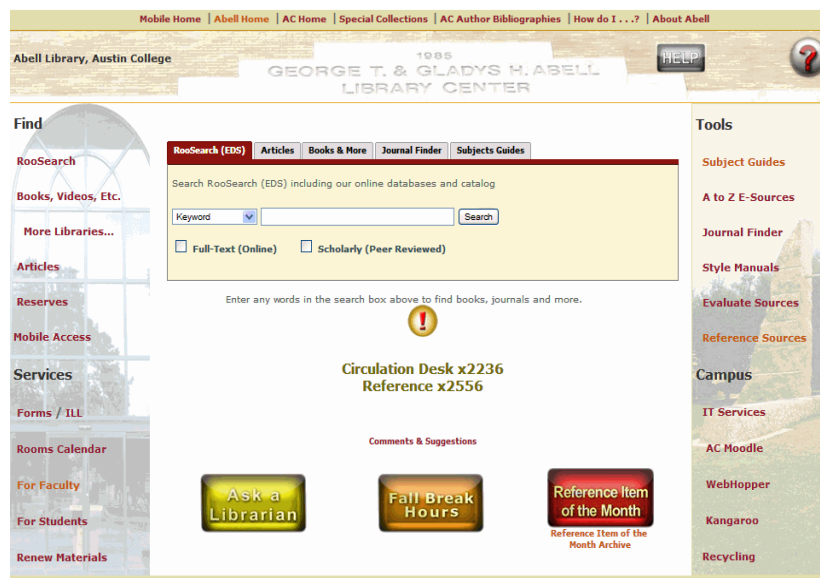


Figure 5. The Abell Library Website Featuring “Roosearch,” a Customized EDS Search Box.

This example search phrase would be: “King Arthur AND PT Book” with the catalog only search limiter denoted. The fourth tab, “Journal Finder,” features LinkSource and A-to-Z widgets. The final tab, “Subject Guides,” presents a drop-down menu with select-and-go function navigating end-users to each of the subject guides featured on Abell’s website. It is also possible to create subject specific EDS widgets that can be embedded on each guide (Figure 6). Hopefully, incorporating these easy-to-use search mechanisms embedded in the library website encourages students and faculty to make good use of the new RooSearch service, facilitating efficient discovery of subscription resources, and provides a greater return on investment.

Two months after RooSearch was made available, a preliminary survey was issued to the faculty, staff, and students. The survey was simple and short to encourage participation. One hundred and five persons responded. Survey results revealed that most respondents were undergraduate students (Figure 7) followed by faculty. Respondents were asked about the frequency of their RooSearch use (Figure 8). A majority indicated that they never use RooSearch. Only 17 respondents said they use the service frequently. Respondents were also asked to compare the usefulness of RooSearch to the catalog. Survey respondents who answered this question gave positive feedback with regard to

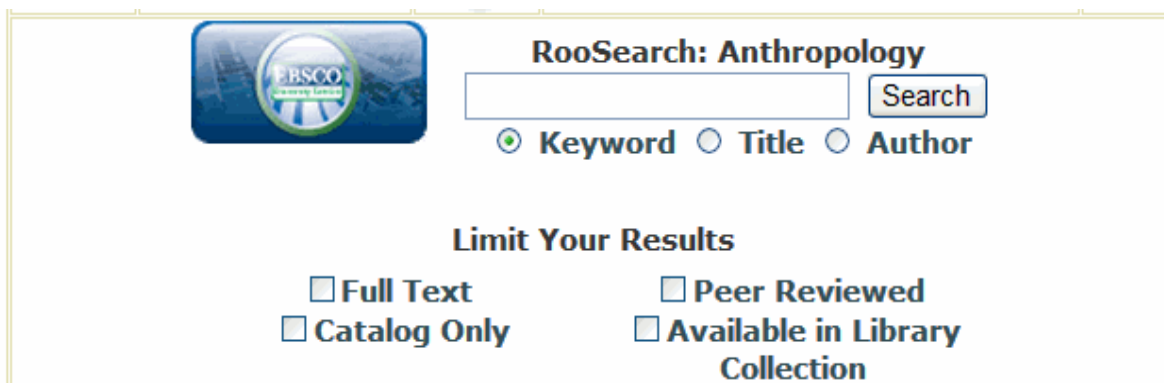


Figure 6. An EDS Subject Specific Search Widget as Embedded on Abell Library’s Anthropology Subject Guide

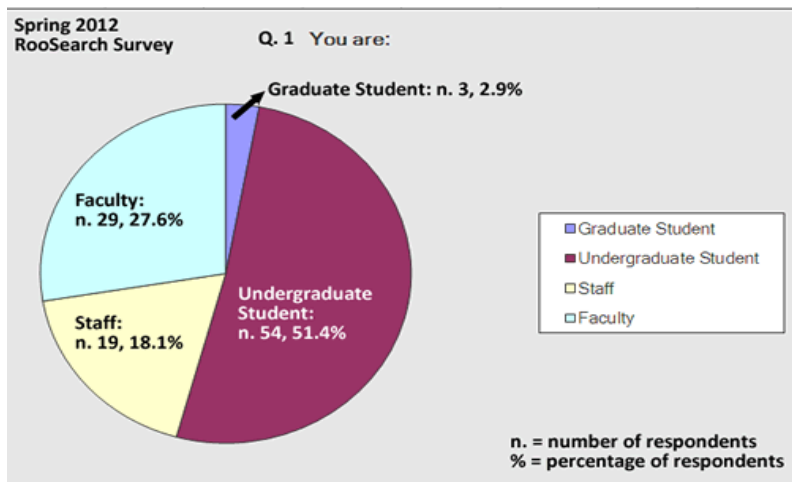


Figure 7. In a Preliminary Survey about EDS “Roosearch” Issued in Spring 2012, a Majority of Respondents Were Undergraduate Students

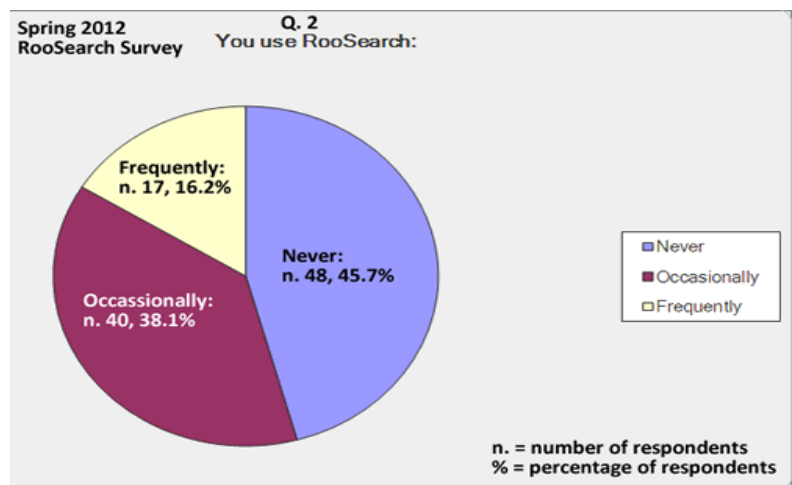


Figure 8. A Majority of Respondents in a Spring 2012 RooSearch Survey Indicated They Never Used the Service

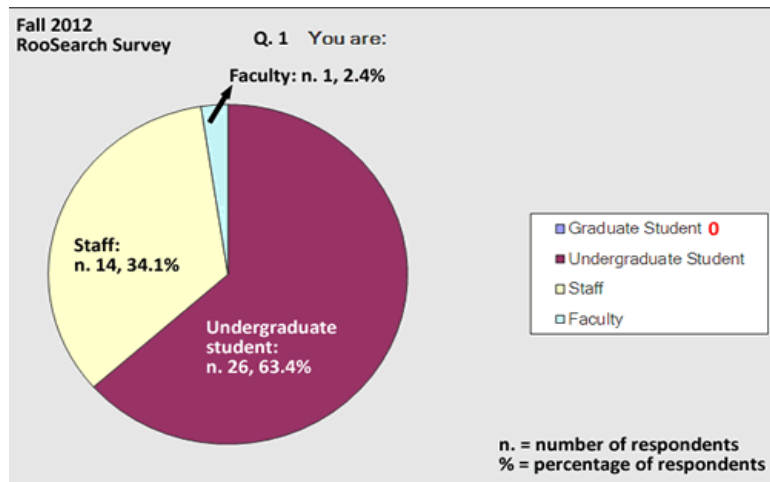


Figure 9. In a Reissue of the RooSearch Survey in Fall 2012, Once Again, a Majority of Respondents Were Undergraduate Students, with Only One Faculty Member Participating

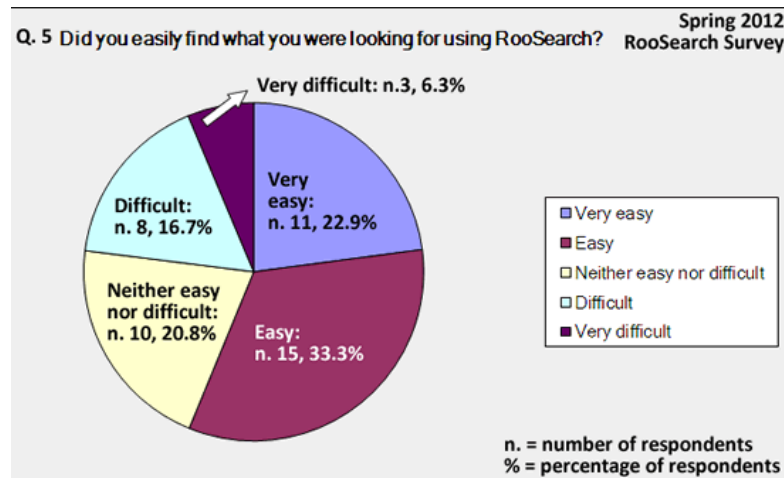


Figure 10. Spring RooSearch Survey Respondents Were Almost Split Down the Middle Regarding Whether or Not RooSearch Is Easy to Use

RooSearch's usefulness in searching the library's collections. A majority of the respondents indicated that RooSearch is better than using more traditional means to search the library's collections.

In October 2012, the library issued a follow-up survey with the same questions. Feedback concerning the effectiveness of RooSearch was less positive. Fewer community members responded to this survey (Figure 9). While "frequency of use" answers were comparable to those of the spring survey, the question on comparing RooSearch to the catalog and single database searching revealed different responses.

The percentage of respondents who indicated that RooSearch was "better" than searching the catalog was smaller. While it is difficult to get an accurate comparison since there were significantly fewer respondents in the fall, the feedback appears to be less positive overall than that of the spring survey. When respondents were asked about the ease of using RooSearch to find what they were looking for, the responses from spring to fall were more comparable (Figures 10 and 11). The first survey shows that more respondents than not found locating the items they needed to be easy in RooSearch, while the follow-up survey in the fall reveals that respondents are split down the middle on RooSearch's ease of use.

Finally, respondents were asked two open-ended questions about using RooSearch: “What was your overall impression of RooSearch (likes/dislikes)?” and “What improvements and/or enhancements would you like to see in RooSearch?” A range of feedback was offered on both surveys, from compliments on the effectiveness of the service, the ease of use of the interface, and speed of locating relevant articles, to the difficulty of learning and navigating RooSearch. Some commented on how they would just like to be taught how to use RooSearch. Others mentioned that they felt the relevancy ranking did not work well and that they had to dig deeper into the results list in order to locate items that were helpful to their research.

Plans are in place to conduct a more comprehensive assessment of RooSearch usage

and effectiveness and an in-depth usability study, by analyzing relevant statistics. Thus far, conclusions gleaned from survey results are generally positive. The EDS implementation team remains optimistic that the installation of a discovery layer was a step in the right direction. By helping the campus community recognize the availability of library-subscribed resources more readily, the potential for an increased return on investment should be heightened. The discovery product should be enhanced over time while researchers learn how to use the service more efficiently. Toward this end, the librarians will work with students and faculty via one-on-one consultations, bibliographic classes, reference duty, and newsletters to promote EDS and to educate patrons on its optimum use.

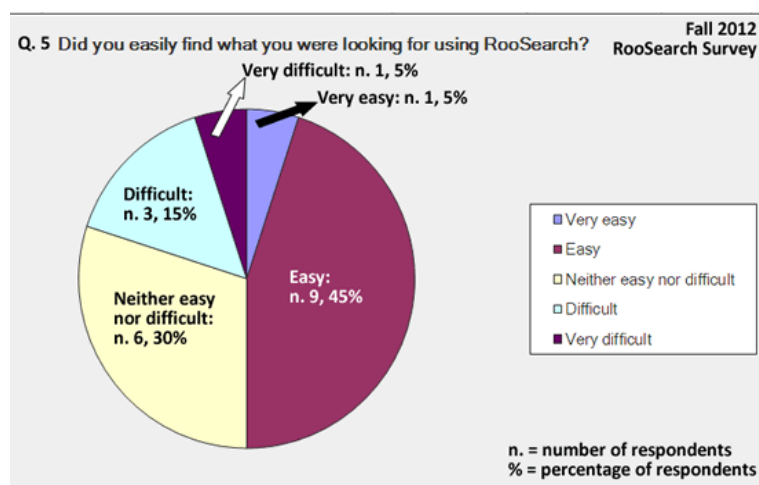


Figure 11: Fall 2012 RooSearch Survey Respondents Are Equally Divided Over Whether RooSearch Service Is Easy to Use