Discovery Services Task Force Recommendation to University Librarian

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I. Recommendation

The Discovery Services Task Force recommends a two-year purchase of Summon, using a combination of funds from unrestricted gifts and from one-time funding made available by E-Campus for improving information access to off-campus users.

We recommend making a two-year commitment to this product for several reasons:

- Committing to two years should give us ample time to evaluate Summon's effectiveness and yet be flexible enough to adjust to anticipated changes in the discovery platform arena as necessary.
- Summon provides our users with a simple, obvious starting point to find OSUL content (articles, books, digital resources) thereby solving what we all acknowledge has been a critical barrier between libraries and users.
- Summon greatly enhances OSUL's ability to unify journal content--both today and in the future. Unifying our journal content lessens the confusion the majority of our users experience trying to identify needed resources from a variety of disparate databases. We also should experience a better return on our substantial investment in journal and book collections because improving discoverability should increase usage.
- The purchase of WCL would ease the integration of records/results from Worldcat Navigator, but there is some concern about OCLC's ability to maintain an adequate development pace for both WCL, Navigator, and its other emerging products and services. [sentence redacted from public version]
- Based on usability testing, Summon will clearly improve the discovery experience for all OSU users. OSU-Cascades users in particular will benefit by being able to restrict a search to OSU-Cascades and COCC catalog holdings and OSU journal content. With WCL and Summit, OSU-Cascades and COCC holdings are separated and their is no way to restrict a search to OSU-Cascades and COCC holdings.
- Of any discovery system, Summon provides the best access to the full-text articles to which the libraries subscribe.

- Other libraries we contacted that have implemented Summon are very pleased with the results. Libraries we contacted that have implemented WCL, on the other hand, are not as pleased with WCL performance.

Because the Summon "search box" will replace Libraryfind eventually, we recommend installing Summon in the winter term of 2010. Implementation should proceed easily but this will give us time to iron out issues and become familiar with the product as if it were a beta product. We could then do a soft launch in early spring term to be followed by a bigger launch later that term to involve more marketing and planning.

Implementation should also be accompanied with a re-evaluation of the Libraries' web presence with an eye toward streamlining access to content. In addition to replacing the LibraryFind search box on the home screen, we recommend that Summon become the primary mechanism for accessing the Libraries' catalog, Summit, etc. A re-design would focus on simplifying the website to remove easy access directly to siloed resources and encourage access through the Summon discovery platform. Likewise, ancillary resources like the Mobile Web or Oregon Explorer should be gradually updated to utilize the Summon knowledge base as appropriate.

Prior to installation, the Task Force strongly recommends that we capture usage statistics for our electronic journals and databases as well as circulation statistics. These statistics can then serve as a benchmark to help us assess the impact of implementing Summon. In addition, it will be important to track the amount of staff time spent implementing and maintaining this platform. In this way, we will have a better understanding of how much it actually costs us to provide this platform when we reevaluate the commitment in two years.

II. Introduction

In March 2009, the WorldCat Local Task Force presented a [report to LAMP](#) that "provides a description of single search options, describes strengths and weaknesses of WCL, and compares the features of WCL with three other resource discovery products including Serials Solutions' Summon". In the report, the task force recommended that a decision be delayed to purchase WCL in order to provide the task force with an opportunity to more thoroughly investigate other products, including Serials Solutions' Summon. That report promised to communicate to LAMP by March 2010 whether WCL or another discovery service is the optimal purchase for OSU Libraries. The timeline has been accelerated in order to take advantage of a substantial year-end discount that Serials Solutions is offering.

Ideally, a discovery system should offer a single search of our local catalog, the articles to which we subscribe, and local digital collections. A discovery system should also offer an opportunity to expand a search to other libraries and citations to articles from journals from which we do not subscribe. Ideally, we also want for the product to serve as a platform that can be adopted for other existing library services such as search, presentation and integration of results within library portals such as Oregon Explorer, subject specific searching from subject and course pages and future services that can be built on top of the platform such as IPhone applications, Google widgets, etc.

Of any discovery system, Summon provides the best access to the full-text articles to which the libraries subscribe. Summon is easy to use, provides relevancy ranked results of full text resources with an option to expand a search outside the libraries holdings. Summon is more conducive to academic library search and retrieval; it includes the ability to restrict a search to peer-reviewed articles. At our request, Serials Solutions is developing an integration of Summit library holdings (see graphic below).

Help | About | Feedback

University Library   Biotechnology   **Search Library**   Advanced Search

Search Results: Your search for 'Biotechnology' returned 2,376 results

Refine your Search   Relevance

▼ Quick Filters
☐ Only show scholarly publications, including peer reviewed
☐ Only items with full text online

▼ Content Type
☑ Any
☐ Journal Articles (2030)
☐ Newspaper Articles (1234)
☐ Books (1181)
☐ Ebooks (46)
☐ Dissertation (43)
more...

▼ Subject Terms
☑ Any
☐ Biotechnology (1872)
☐ Biomedical Technology (844)
☐ Neurosciences (513)
☐ Biochemistry (412)
☐ Biophysics (190)
more...

▼ Date
Jul ▼   ▼ 2000 to
  ▼   ▼ 2009
Update   Cancel

▼ Library Locations
☑ Any
☐ Main Library
☐ Business Library
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☐ Chemistry Library
☐ Music Library
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ERIC
The Education Resources Information Center - online digital library of education research and information.

Did you mean: *Biotechnology* ?

Engineered bone culture in a perfusion bioreactor: a 2D computational study of stationary mass and momentum transport.
Journal Article
by Pierre J, Oddou C
Computer Methods Biomechanics and Biomedical Engineering Volume 10, Issue 6, December 2007 pages 429-38 Taylor & Francis
...still is a challenge for **biotechnology** and requires a strict control of the physicochemical and mechanical environments.
Availability: Smith Library, due 10/17/08

Molecular biology and biotechnology : a guide for students
Book
by Ian W. Sutherland
1990. Cambridge studies in biotechnology, 9. Cambridge: Cambridge University Press.
Availability: Smith Library, checked in

Characterization and expression of the coat protein-coding region
Full text
Journal Article
by Rodoni BC, Dale JL
Biotechnology Advances Volume 12, Issue 4, 1998, Pages 625-633
The review focusses on the use of genetic techniques to manipulate bacteria that are important to the dairy industry.
Availability: Full text online; Smith Library, on shelf   Times Cited: 37

Beyond biotechnology : the barren promise of genetic engineering
Book
by Craig Holdrege
Lexington, KY : University Press of Kentucky, 2008
Availability: Medical Library, reserve

Related books from nearby libraries

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Availability: Medical Library, reserve

Biotechnology
Patrice Cassedy
Availability: Full text online; Smith Library, on shelf

Pharmaceutical biotechnology
by M J Groves; NetLibrary, Inc
Availability: Full text online
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Biotechnology and Genetic Engineering Long Title...
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See all books from nearby libraries

Results per page: 25   ◀ 1 2 **3** 4 5 ▶

Results powered by Summon™ from Serials Solutions, a division of ProQuest.
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What of other products that might be deemed a "unified search system?" Viable contenders included Primo, the of Ex Libris and Ebsco's Discovery Service. Many of the benefits a library might accrue from implementing Primo appear to be based on "harvesting the institution's SFX and MetaLib knowledge bases." SFX and MetaLib are Ex Libris products to which OSUL does not currently subscribe. (See
http://www.exlibrisgroup.com/files/Products/Primo/PrimoSearchWhitePaperDec2009.pdf.)
Ebsco's Discovery Service was announced in late April 2009 but is not supposed to be released until the end of 2009. It offers many of the same features and functionalities as Summon and Primo, but at this point it is a new and untested product. Ebsco has not brought beta users and early adopters on board so obtaining evaluations and insight from other libraries was not possible. (See http://www.ebscohost.com/discovery/default.php?par=2).

III. Costs [redacted from public version]

IV. Product Comparison

We list here some of the search and retrieval, content and other features that might be expected from a resource discovery system and which of the two systems we investigated (WCL, Summon) provide that functionality. We indicate which provides the best functionality with red text.

Search and Retrieval	Summon	WorldCat Local
Relevancy ranking	X	X
Visualization	O	O
Faceted Browse	X	X
Single Search Box	X	X
Restrict to Full Text	X	O
Restrict results to e-books	X	O
Restrict to Peer Reviewed	X	O
FRBRized Results	X	X
Spell Check	O	O
RSS Notification	X	X
Books - consortial fulfillment	X	X
Books - ILL fulfillment	X	X
Google Books	?	X
Article fulfillment	X	X
Refine search by subject	X	X
Change sort by	X	X

Save citations to a folder	X	X

Content

Articles	X	X
Unique local digitized resources	X	X
Finding aids	X	X
Consortial holdings	X	X
Other library holdings	X	X
Scope to a specific collection	X	0

Added Features

Book Covers	X	X
Scholarly Book Reviews	X	X
User-Contributed Reviews	O	X
User Tagging	O	X
Recommendations	O	X
Option to Purchase	O	X
Citation Management	X	X

In usability tests of WorldCat Local earlier this year, it was found that several of these added features were not desired, particularly the ability to purchase a book from the interface, and were distractions.

Other

Clarity of Display	X	O
Icons/Images	X	O
Speed	X	O

V. Coverage

WCL and Summon as products have similar purposes and goals. However, it is not simple to compare content coverage in part because the assets of the two products draw from the existing strengths of OCLC and Serials Solutions. Likewise, both WCL and Summon continue to add content providers on a regular basis, which also makes content analysis difficult.

WCL boasts ample coverage of many content providers that they list by database name. (See: http://www.oclc.org/worldcatlocal/overview/metasearch/dblist/bydatabase.htm). These databases consist of full-text and just A & I resources. WCL's broad coverage draws on the suite of A & I databases offered via OCLC's Firstsearch services as well as many non-OCLC licensed databases (i.e., Ebsco databases). In this arena, WCL has an edge over Summon, offering metasearch coverage of databases from CSA, Ebsco, Wilson, and a few from both Proquest and Chadwyck Healey. One advantage that OCLC has over Summon is better coverage of Ebsco's Business Source Premier.

Summon's strength lies in its ability to harvest content from approximately 4800 publishers, most of them academic, including the likes of Springer, ACM, Wiley-Blackwell, and Elsevier. Not surprisingly, Summon draws on the electronic resource management services that have been the bread and butter of Serials Solutions since 2000. In December 2009, Summon laid claim to covering approximately 90,000 periodical titles.
(See: http://www.serialssolutions.com/assets/publications/Summon-represented-titles.pdf).
Serials Solutions staff provided us with coverage analysis demonstrating: Of the 62,645 unique titles to which OSU Libraries has full text access, approximately 3,694 are not in Summon today. Of these 3694 titles, only 737 titles are peer-reviewed. This number will continue to shrink as more and more content is loaded into the Summon index. Though database coverage is hard to describe for Summon, we should note that recently Serials Solutions signed on Thomson Rueters' Web of Science in the last few weeks. Default searching in Summon provides a user with results from OSUL's holdings; however, with the click of a box, a user can expand to citation searching of resources outside OSUL.

VI. Subject Librarian Feedback

We asked the subject librarians for feedback about the product. The subject librarians were given URLs to the Dartmouth and Grand Valley sites and then asked to respond to a brief survey. In general, the subject librarians had a favorable impression of Summon. They liked the faceted search options, the clarity of the display, the images and icons used to represent full-text and the format, how quickly the results were returned, ease of navigation, the integration of sources specifically that it displays what is in the home library first, and the integration to full-text. Other positives were the ability to print/save/email. The librarians did not like that some features in the faceted searching appeared to be unavailable and sometimes the response rate of the system was slow. The librarians were not sure what exactly they were searching (content) or how to locate books from other libraries in the system. It also took several clicks to get to the actual library catalog record. In a follow-up meeting held on December 8th, we asked the subject librarians what issues or concerns they have should the library decide to purchase the Summon product. While overall the librarians were positive about Summon, they felt that the following concerns

need to be addressed before any decision is made. The subject librarians indicated that they would consider the inability to satisfactorily address any one of these issue a "deal-breaker."

- The money to purchase Summon cannot come out of the collections budget;
- It must cover a majority of our content;
- Summit must be fully integrated;
- The OSU Digital Collections need to be fully integrated and Summon must provide access to other institutional repositories;
- Implementing and maintaining Summon should only require minimal programming and maintenance time.

For more thorough notes on subject librarian feedback, see: Subject Librarian Feedback About Summon.

VII. Feedback from Other Implementors

Based on references that Serials Solutions provided us as well as peers known to Task Force members, we contacted four academic libraries that have implemented Summon. We were able to interrogate library staff at two of these institutions, Oklahoma State and North Carolina State University. Oklahoma State was a beta partner with Serials Solutions while NCSU was not. Both libraries are excited about the possibilities that Summon offers their users, are comfortable with the growing coverage of content, and have been pleased with their collaboration with Serials Solutions staff. Each of these libraries is preparing to launch Summon in the coming year; NCSU in early January 2010. Details of these "interviews" are available at: [redacted]

We also gathered input from librarians at [redacted] who had recently implemented WorldCat Local. These librarians generally acknowledged the benefits of providing users with a single search box. Two were not clear about the benefits that Worldcat Local provided users. Based on some of the feedback, it appears that some of the frustration associated with Summit's implementation of Worldcat Navigator might be influencing, if not confusing their understanding of what Worldcat Local offers vs. what Worldcat Navigator does. The complete summary of these discussions is available at: [redacted]

VIII. Conclusion

As a library we have striven to simplify the task of searching across the siloes of content and collections that we manage. In our 2004 strategic plan, our ambition was to:

- be as easy to use as Google and other search engines;
- deliver information wherever and whenever it is needed.

When we couple the goals of our strategic plan with our struggle to just afford valuable content, Oregon State University Libraries had compelling reasons to provide a single search box that eliminated a confusing array of possible starting points, organized and ranked the most relevant for our users, and increased the exposure of our collection investment. That ambition launched LibraryFind which "pushed the envelope" in terms of helping libraries address how users might

uncover an increasing array of digital resources, electronic journals, and aggregated content. That same ambition has driven us to examine alternatives like Summon or Worldcat Local. Though ultimately such alternatives would replace LibraryFind as our single search box, they have not displaced the desire and need we have to continue developing our discovery platform.

It should be apparent that the environment for discovery tools and products is constantly changing. Our needs and so our users' needs and demands will likely morph in the next couple of years and technology will be adapted to accommodate these needs and demands. That said, the Discovery Task Force believes that Summon is the best product to help us move forward with our goals in the next couple of years.