

## UKSG webinar – Impact of Library Discovery Technologies, 14 May 2014

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Should you have a question arising from the webinar and not answered below, please e-mail Ed or Valérie who will be happy to respond.

### Questions arising from the Q&A session and the registration form:

#### **Q1: To what extent are faculty, post-docs and students making use of discovery solutions rather than using Google?**

A: We don't know the extent to which faculty, post-docs and students are making use of discovery solutions rather than using Google. The participating libraries suggested that visits to the library website and particularly the search box had increased, but we do not know more about this as this was beyond the focus of our project which looked specifically into the impact of RDS on e-resources usage.

It would be indeed very interesting to look at library user behaviour when they search for information and conduct a profile analysis to see whether students, faculty and researchers exhibit different behaviours. This would be indeed an interesting research project. (VS)

#### **Q2: Is Google Scholar going to become flexible enough to use as a local discovery solution?**

A: This was beyond the scope of our project so it is difficult for us to speculate on this. However, there are a handful of libraries that are experimenting with Google as a local discovery solution and if you're interested in getting to know more about this, I invite you to look at what is being done at the University of Utrecht in The Netherlands. Simone Kortekaas gave a talk at the UKSG conference about its approach and decision to use Google as a local discovery solution. (VS)

[http://www.youtube.com/watch?v=d\\_2ycMk\\_9fA](http://www.youtube.com/watch?v=d_2ycMk_9fA)

#### **Q3: How long do you think those library discovery technologies that are currently in the ascendency will be around for?**

A: This is very difficult to say and I don't think we are in a position to speculate on this. However, what we've learned from the research is that:

- Libraries reported that user feedback is generally very positive, particularly from undergraduate students.
- The Google-like single search box seems to make it easier for students to search for information. It finally makes it possible for library users to search across almost all library collections, regardless of the type of resource. It searches across books, journals and databases (collections are no longer kept in silos with separate entry platforms). The search process is therefore less 'clunky'. The return of results seems to be a lot quicker too. Federated search tools may bring more relevant results for in-depth searches though. (VS)



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### **Q4: How can we ensure that customers have the right settings?**

A: The research found that minor tweaks in the settings of the RDS can have drastic effect on how content is surfaced, to the point that some publisher content may be totally missed if the settings are overlooked.

We recommended a greater collaboration and open communication between the three parties – i.e. libraries, RDS suppliers and publishers/content providers – to work together on these issues. (VS)

### **Q5: Is federated search dead in favor of centralized indexes?**

A: We don't know whether federated search tools are dead but RDS have an undeniable advantage over federated search, which is the quick return of results. The two systems work differently. In an RDS, resources are aggregated into a single index and this is searched simultaneously. In federated search, resources remain in their native databases and are searched separately, though also simultaneously. The search software is customised to understand the metadata of the target resources and so, ideally, should retrieve more comprehensive and accurate results.

If librarians feel that an RDS is not picking up everything, they might consider that a federated search system, if available, could provide a solution for those resources that are missed. (VS)

### **Q6: Regarding the future of A&I databases, will they be ready to include subscribed content of libraries?**

A: The future of A&I is unclear. In our study we've found it extremely difficult to evaluate the impact of RDS on A&I. The primary reason is that the usage data that is collected for databases is not reliable, nor consistent, which makes it virtually impossible to conduct any rigorous statistical analyses. In our report we actually recommended that further research be conducted on the specific case of A&I and hopefully this is something that will be picked up by one of the stakeholders in the information supply chain.

I'm afraid there is not enough information to comment on the second point. (VS)

### **Q7: Can you tell us why only 25% of libraries who have RDS removed access to their OPACs please?**

A: Some libraries taking part in the study explained that there were some transactions that still required access to the OPAC, such as book reservations. They indicated that not all library transactions could be done via the RDS. (VS)

### **Q8: How many libraries have replaced library catalogue interface with RDS as main front end to physical resources held by library?**

A: Half of the survey respondent considered the RDS to be a replacement for their previous online catalogue, but only a quarter of them no longer offered access to their OPAC. (VS)

### **Q9: Can you expand on the issue of coverage within the RDS? I had thought that all subscriptions were to be represented within the system.**

A: The issue of RDS coverage is an extremely complicated one. The coverage information provided by RDS supplier is sometimes too vague for libraries to know exactly whether the RDS index covers

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exactly what they subscribe to. Here is an example: A library X subscribes to a journal title Y. Journal Y is indexed by the RDS, but only for a specific range of years. It may therefore be possible that subscribed content is not retrieved by the RDS because it is out of the range of years indexed by the RDS. Another example is with law material. A library subscribes to a law database W, which provides US and UK content. On some occasions, libraries reported that their RDS was primarily retrieving US content. (VS)

### **Q10: Did the research gather feedback on promotion of RDS with academics and students? Are there any common good practice tips or things to avoid?**

A: We didn't look into this specifically, but some libraries mentioned that they had customised the name and look and feel of the RDS to help take up of the new system. The location of the search box across various library webpages and across some other university pages, included the VLE, seems to help bring users to the RDS. They did not elaborate any further on good practice things or things to avoid, unfortunately. (VS)

### **Q11: Early on in the presentation you mentioned that there are two other studies going on? Can you say what they are?**

A: The first study is the study from Michael Levine-Clark (University of Denver), John McDonald (University of Southern California) and Jason Price (SCELC Consortium): 'Discovery or displacement'. ([http://www.youtube.com/watch?v=d\\_2ycMk\\_9fA](http://www.youtube.com/watch?v=d_2ycMk_9fA))

The second study is from Ithaka, 'Can users find your content anymore?' (<http://ithaka.org/sites/default/files/files/Heterick.pdf>) (VS)

### **Q12: "Database results were inconclusive" Can anyone expand on theories that the RDS product used directly determines which DBs are more visible. In short, we saw a big drop in Ebsco DB usage and hypothesised it had something to do with using Summon/a PQ product.**

A: This is a very complex issue. Libraries reported that they did not always feel that content was provided on a neutral basis by RDS suppliers. They also reported that they did not always understand how the relevancy ranking works. However, RDS suppliers we spoke to claimed that content was provided on a neutral basis and that libraries were made aware of how the relevancy ranking works. This is developed further in our report ([http://www.uksg.org/sites/uksg.org/files/UKSG\\_final\\_report\\_16\\_12\\_13\\_by\\_LISU.pdf](http://www.uksg.org/sites/uksg.org/files/UKSG_final_report_16_12_13_by_LISU.pdf)). (VS)

### **Q13: To me, RDS's seem to be facing an uphill battle to get researches back to the library portal. Have you looked at total usage versus searches inside RDS, to asses the level of acceptance and use?**

A: We didn't look into levels of acceptance by library users. We focussed our research onto whether RDS have an impact of usage of e-resources. (VS)



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**Q14: An older Jisc report in this area is available (2010) - perhaps now is the time to revisit this <http://www.jisc.ac.uk/publications/programmerelated/2010/ubirdfinalreport.aspx>?**

A: Our study didn't look into user behaviour in the context of RDS, this was beyond the scope of our research; but we agree that there is definitely a need to follow up on this. (VS)

**Q15: What do you think about changing the name of RDS? For example we changed our RDS's system with OzooGle+.**

A: Some libraries did indeed change the name of the RDS to facilitate acceptance and take up of the new system. From a marketing point of view, a carefully chosen name can help. (VS)

**Q16: What is the effect of discovery technologies on e-resource usage stats?**

A: This is explained in the presentation and the report. There seems to be a positive influence of RDS on e-resource usage. The impact seems to be more marked for e-books than journals. The results of the database usage analysis were inconclusive, unfortunately. It is important to bear in mind that we are in a multi-dimensional environment and it is extremely challenging to isolate the sole impact of RDS on e-resource usage - there may be a variety of other factors at play in this environment. (VS)

**Q17: Why do libraries still need to provide discovery solutions?**

A: There is a slight trend that libraries will put more emphasis on delivery of information and services and less on discovery if RDS are successful in aggregating access to resources including OPAC resources. This was actually discussed by Simone Kortekaas at the recent UKSG conference <https://www.youtube.com/watch?v=a6BPclajLVI>

At the moment the predominant thought is that libraries have invested so much on developing their own discovery services that it is still pretty unthinkable to abandon it. (VS)

**Q18: What is the impact on secondary publishers - specifically databases – and is there any evidence for this?**

A: This is an issue that we identified in the project and this is an important point.

We found it very difficult to evaluate the impact of RDS on secondary publishers and the main reason for this was that there seems to be little consistency in the collection of database usage data (DB1). Looking at the data that were provided by libraries, it seems that some RDS run searches across multiple databases, which is likely to lead to multiple counting.

This is why we made one recommendation to monitor the developments led by COUNTER 4 and build up on this in order to develop better practices in relation to database usage data. I think we've identified, in our research, a real need for further research on the impact of RDS on database usage. (VS)

**Q19: How do Marc records impact discovery?**

A: We did not explore this in our research; this is closely linked to the issue of how the library catalogue is integrated in practice into an RDS. I know however that some institutions have had to tweak their catalogue records (not necessarily MARC records) to include some collections in the RDS but I do not know the details of it. This is a question we did not ask and a librarian who has



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implemented an RDS or an RDS supplier would be in a better position to answer this specific question. (VS)

### **Q20: How important is the provision of metadata in standardised form?**

A: Talking to participating publishers we learned that it is rather important for publishers to standardize and optimize their metadata and make them fit the RDS metadata fields to ensure that publisher content is surfaced properly by the RDS system. If publisher metadata don't match the RDS metadata field, it is unlikely that the content will be surfaced and discovered.

For example, one participating academic publisher said that they had to add the category 'peer reviewed' to all their metadata records [which they thought was obvious for them since they were an academic publisher], otherwise their content wouldn't be surfaced if peer reviewed material was selected either by the library as a default setting or by user in the facets. (VS)

### **Q21: EBSCO Discovery product/Summon/ EBSCO EDS**

A: This point is about specific products and the research was not designed to enable comparisons between products. This was not the purpose of our study. I am sure there are forums devoted to help people make decisions in relation to RDS. (VS)

### **Q22: What are the best practices for evaluating vendors?**

A: This is a complex point as every single institution has specific requirements and compiling an RDS evaluation toolkit was definitely beyond the scope of the research.

The research however uncovered some points to take into consideration when considering moving to an RDS system.

Those points include:

- Defining the purpose of having an RDS at your institution: what is it that you want to achieve with the RDS?  
You may want to
  - facilitate information searching for your undergraduate students (i.e. to make it easier to transition to information searching in a higher education environment);
  - push out some collections which were previously underused;
  - push out a certain type of collections (e.g. institutional repository, special collections etc.).  
For instance, if it is to push out some specific collections, an institution may find that they have a lot of work to do on the current metadata to make them fit the RDS environment and become discoverable via the RDS. There is therefore a non-negligible cost associated to RDS and an institution needs to be clear about the purpose of moving to an RDS in order to assess whether it is worth it.
- Asking the vendor a detailed report on what is and isn't included in the RDS index. In our study, the participating libraries reported that they often didn't know what was included in the index, so they were unsure of the coverage and whether the index matched closely enough their subscribed collections.
- Responsiveness to customer-driven developments – how well a RDS supplier is able to develop its RDS product in response to requirements voiced by the RDS library community.
- Possibility to organize on-site visits
- How well the user forum is set up for help from peers



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There is an increasing literature reporting the vendor evaluation process (there are often case studies) and workshops where people share experiences. (VS)

### **Q23: What is the impact on student research skills?**

A: It was suggested by the participating libraries that undergraduate students were the target population for RDS systems as those systems make it easier for students new to university life to search and retrieve information sources. Although this was not explored further in our research there was a suggestion that users requiring more in-depth information – such as postgraduate students and researchers, were not necessarily advised to go through the RDS entry point but rather to search specific databases separately, as they had always done.

We did not look at this and this could be a topic for further research. Research in this area would actually be useful. (VS)

### **Q24: What is the impact on LMS and OPAC vendors/products?**

A: It is difficult to know the impact RDS have on LMS and OPAC and this was not directly explored in our research. However, what we can say is that almost half of the survey respondents considered the RDS to be a replacement for their previous online catalogue, but only a quarter of them no longer offered access to their OPAC. In the case studies, librarians had very mixed views about whether they considered their RDS to be a replacement for their catalogue. It was often reported that access to the catalogue was still required for some library transactions such as book reservations etc.

It is very difficult to predict how RDS are going to evolve but it may possible that RDS will take on more of the LMS and OPAC functionalities in the future. There is also an emerging view that libraries will put more emphasis on delivery of information and services, and less on discovery if RDS are successful in aggregating access to resources, including OPAC resources. (VS)

### **Q25: Use cases for different types of students/researchers**

A: Exploring the impact of RDS on user behaviours and particularly different types of users would indeed be very interesting and hopefully this point is going to be picked up for future research. (VS)

### **Q26: Data share, indexing**

A: The sharing of metadata was identified as an IP issue by some publishers and content providers. Publishers and content providers were often concerned about how the data were going to be used and voiced their concern about the lack of clarity of RDS suppliers on that matter. (VS)

### **Q27: How complete is the index for WDS?**

A: It depends on the RDS supplier, the profile of your institution and the current subscriptions for your library. There are some disciplines that are generally better covered than others. For instance, law is a discipline that is not well covered in general, whatever the RDS supplier. This is because law publishers and content providers have not fully engaged yet with RDS systems. (VS)



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### **Q28: How are discovery tools luring students away from Google?**

A: It is unclear if discovery tools are actually luring students away from Google, and our research didn't explore this topic. However, what we can say – based on the research findings – is that libraries are often seen as the last port of call for students during their search for information. This resonates with research conducted in the student information behavior area in the last 10 years. The complexity of the library environment has driven students away from the library. Different types of resources or different formats require students to search different catalogues or electronic platforms separately. In today's digital environment, where remote and instant access to all types of information is the norm, it is understandable that students have turned to search engines such as Google to retrieve the information they need.

Libraries are eager to bring students back to the virtual library – where one can find authoritative information sources - and make it the first port of call for students, by providing a Google-like experience, which means one single entry point searching across (almost) all resources. It may be too early to say whether libraries are actually achieving this through the implementation of RDS. There is an indication that e-resource usage has gone up in the libraries after implementation of their RDS, but further research on students' information behaviour (RDS vs. Google) would be welcome to see whether libraries have actually managed to bring students back to the virtual library to fulfil their information need. (VS)

### **Q29: It would be useful to hear about student views of library discovery technologies, not just impact on journal use etc.**

A: I agree it would be useful to explore students' views and perceptions of library discovery technologies but this was beyond the scope of our project, which was focused on content usage. Looking at students' views would be indeed very interesting but it would be a totally different project. (VS)

### **Q30: What are the disadvantages of rivalry and exclusivity from current popular suppliers?**

A: If this is in relation with library products from different suppliers, this gets us into the realms of competition for business and market share, and as independent researchers it is not something we can comment on.

All we can say is that there are different perspectives as to whether the levels of interoperability between the various products are advantages or disadvantages.

Now, if this is in relation to the lack of cooperation between some content providers and RDS suppliers, then it is fair to say that the issue is being increasingly recognized by stakeholders, which is putting pressure on the interested parties to try and find a way to work together.

Some vendors, at one stage, were not allowing their resources to be used in rival RDS. Things are evolving, albeit slowly, and I believe work is underway to resolve this but there will remain for some time concerns from content providers that access to their content is not maximised in an RDS, hence those who have chosen not to participate. Time will tell whether it makes better business sense to be included or not. (VS)

