

Chapter 3

Details, Details, Details: Issues in Planning for, Implementing, and Using Resource Discovery Tools

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ABSTRACT

This chapter presents a high-level, non-system-specific discussion of issues surrounding the planning, implementation, use, and maintenance of discovery tools. The purpose of this chapter is to facilitate discussion as the library prepares to evaluate discovery tools and prepare for their implementation. In some ways, these issues are not markedly different from any library system implementation and can be understood on the basis of existing project management literature; however, there are issues specific to discovery tools and their integration with existing library systems and workflows that should be considered. Additional post-implementation issues specific to discovery tools are also presented.

INTRODUCTION

This book is intended to assist administrators and librarians in their planning and implementation processes. Many of the concepts in this chapter have been touched upon elsewhere throughout the book; however the intent is not to repeat, but to place some of the issues surrounding the plan-

ning, implementation, and use of discovery tools in a larger context in order to provide a basis for discussion as the library prepares to enter the world of resource discovery. None of what is discussed here is vendor- or system-specific, but is intended to generate questions that planners and systems personnel can ask of vendors and developers as the selection and implementation process moves forward. Much of what is presented here can also be a part of any Request for Proposal (RFP) to

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vendors – if the library has specific needs relative to implementing a discovery tool, making sure they are in the RFP is vital. (Caswell, 2007) In complex projects such as this, it is easy to miss details that become important later on; “action items” are flagged in this chapter that can serve as reminders of these details. Note that the terms “discovery system(s)” and “discovery tool(s)” are used interchangeably throughout. As noted in the literature review, the terminology used to describe these types of products varies widely. There are topics that are out of the scope of this chapter’s focus, such as optional ERM (Electronic Resource Management) modules that available with some discovery systems. These additional features, if important to the library, should be included in the vendor evaluation process.

BACKGROUND AND LITERATURE REVIEW

The purpose of a discovery tool is to aggregate and expose content from a variety of existing resources. This makes it an adjunct to other resources, not a replacement; without external databases and internal datasets there would be nothing to “discover.” The reasons for a library to consider implementing a discovery tool can be compelling. The sheer number of data sources currently available to most libraries is overwhelming to the user, and discovery tools are a means of addressing that confusion (Vaughan, 2011a). In the print environment, access to resources was relatively proscribed by the tools available – the printed (and then the online) catalog. The environment has transitioned to where:

... information resources are relatively abundant, and user attention is relatively scarce. Users have many resources available to them, and may not spend a very long time on any one. Many finding tools are available side by side on the network, and large consolidated resources have appeared in the

form of search engines. Even within the library, there are now several finding tools available ... The user is crowded with opportunity. No single resource is the sole focus of a user’s attention. In fact, the network is now the focus of a user’s attention, and the available ‘collection’ is a very much larger resource than the local catalogued collection. The user wishes to ‘discover’ and use much more than is in the local catalogued collection. (Dempsey, 2006, p. 1)

Like Z39.50 before it, however, a discovery tool cannot entirely take the place of discipline-specific search tools (East, 2003; Fagan, 2011). Think about the user’s needs – for some specialized libraries, a discovery tool may not provide much utility beyond core, dedicated, subject-specific databases and Web-based resources (Luther, 2011; Dartmouth, 2009). Native search interfaces in specialized databases take advantage of controlled vocabulary and indexing that are not a part of the data harvesting done by a discovery tool.

Do you need a discovery tool? Are existing data sources for your users well-defined and well-known to them? Are they sufficient to meet your users’ needs?

As a relatively young technology, discovery systems and capabilities are evolving at a rapid pace. In addition, the equally rapid changes in the marketplace mean that vendors change licenses frequently – what impact this will have on discovery systems in the long term is unknown (Breeding, 2011). Feedback on actual use and real world experience with discovery systems is somewhat sparse. Internal and unpublished reports, blogs, and library Web site FAQs often provide information that cannot be easily found in the published scholarly literature (e.g. Queens University, 2010; Tarulli, 2009).

Locating relevant citations can be a challenge. Searches done using *Library, Information Science & Technology Abstracts* and the *Library Literature*

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