Chapter 34
Simplifying Resource Discovery and Access in Academic Libraries:
Implementing and Evaluating Summon at Huddersfield and Northumbria Universities

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ABSTRACT

The University of Huddersfield and Northumbria University were two of the first adopters of the Summon™ Web-scale commercial discovery system in Europe. Both universities were moved to implement a discovery tool because they had encountered issues with their existing federated searching products, with students and staff expressing dissatisfaction. This chapter describes the selection, implementation, and testing of Summon™ at both universities drawing out common themes and differences, with suggestions for those intending to implement Summon™ and some ideas for future development. User feedback from surveys, focus groups, and user testing is described, and instruments are appended. User testing evaluated user search refinement, satisfaction with relevancy ranking, comprehension of results presentation, and feature approval responses. The perceived success rate in comparison with Google search results is briefly described. Other concepts described include launching new functionality, key points for effective implementation, MARC mapping, staff training, and marketing a discovery tool.

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INTRODUCTION

At an online conference in 2009, John Shipp, the University Librarian at the University of Sydney, commented that facilitating information discovery and maximising value for money from library materials is a key driver for academic libraries. Users are confused by the complexity of our collections and are often reluctant to spend time learning how to use individual databases - comparing them unfavourably to intuitive search engines like Google (Duddy, 2009). As a consequence, the library may be seen as too complicated and time consuming and many valuable resources remain undiscovered or underused. Federated search tools were the first commercial products to focus on this problem. While going some way to address this issue, users complained that they were clunky and complicated to use (Stone, 2009). In 2007, Tenopir (2007) commented that "The jury is still out on federated search systems, even though more libraries now have them. There are murmurings that federated search has lower-than-expected use and may not be the magic search bullet we were led to believe" (p. 30)

The development of web-scale discovery services promised to improve the search experience by harvesting and indexing metadata direct from publishers and local library collections into a single index, making searching simple and fast. (Gibson, et. al. 2009)

The Universities of Huddersfield and Northumbria are similar institutions: both are large UK 'post-1992' universities (23,000 and 24,000 FTE students respectively) with specialist and increasing areas of research excellence. At Huddersfield the Library is part of a converged Computing and Library Service while Northumbria Library and Learning Services is separate from the University IT department. While both University Libraries have been successful in delivering innovative and user centric services, Huddersfield have a dedicated Library Systems Manager with the technical expertise to customise systems to local requirements. At Northumbria, the policy has been to outsource and develop computer systems with third party suppliers rather than in house.

In 2009 both Huddersfield and Northumbria Universities purchased Serials Solutions®[1] Summon™ to replace existing federated search products. This case study describes the selection, implementation and testing of Summon™ at both universities drawing out common themes and differences, with suggestions for those intending to implement Summon™ and some ideas for future development.

SELECTION

Huddersfield

At Huddersfield a project group was established to examine the existing arrangements for the provision of e-resources and suggest recommendations for the future. One of the tasks of the project team was to invite suppliers in to discuss products in order to understand the different offerings within the market place. A 'clean sheet of paper' approach was used, with the project team identifying four main 'vision objectives' for the future system.

- First class search engine
- Provide a 'one stop shop' for all electronic resources
- Greater interoperability and flexibility
- More efficient management and administration

These criteria were used to evaluate supplier offerings from a range of suppliers of discovery solutions including Ex-Libris™[2], EBSCO and Serials Solutions® as part of the review. As a result it was agreed to conduct a restricted European Union (EU) tender for a provider of a library discovery service of pre-harvested content. The contract was awarded to Serials Solutions®.