

Chapter 35

Implementation of Resource Discovery: Lessons Learned

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ABSTRACT

Academic libraries have a myriad of information sources for their communities, yet meeting users at their point of need can be a daunting task. Web-scale discovery tools offer a way to pull together many library resources for retrieval through a single search interface. The lessons learned in this case study at Montana State University include challenges with implementation, troubleshooting, collection development, and user education. Strategies and solutions to problems such as “full-text red herrings” (broken links to articles from aggregated databases) as well as techniques for prioritizing search results are described. Incorporating locally digitized collections in the discovery tool is also explained. The impact of discovery on collection development can take many forms and this case study details three issues that this implementation caused to emerge. The examples described in this chapter serve as helpful considerations for other academic libraries in their Web-scale discovery product exploration, implementation, and analysis.

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BACKGROUND OF THE CASE: TESTING WORLDCAT LOCAL, IMPLEMENTING SUMMON

Montana State University (MSU) in Bozeman decided to enter the Web-scale discovery service market in January 2010. Following a trial of WorldCat^{®1} Local from OCLC and an examination of alternative tools, MSU chose to subscribe to Summon^{TM2} a Serials Solutions^{®3} product. This chapter describes the decision to use SummonTM, the implementation process, and lessons learned since rolling out this search platform in August 2010.

MSU is the land-grant institution for Montana -- a state which has a small population (fewer than one million people), a large geographical area (fourth largest in the United States), and low personal income (43rd lowest household income) (U.S. Census Bureau, 2010). Located in Bozeman, it serves over 14,000 students, 2,400 employees, and the citizens of the state (Montana State University Office of Planning and Analysis, 2011). It is one of 108 schools on the Carnegie Foundation's list of top research institutions (Carnegie Foundation for the Advancement of Teaching, 2011). The MSU Library has over 775,000 book volumes and subscribes to more than 15,000 serials and databases. Its employee base includes seventeen librarian faculty members, two professional staff, thirty-three classified staff, and twenty-five student assistants; it operates on a total budget of approximately seven million dollars (Montana State University Library, 2011).

Along with MSU, nine other libraries share the SirsiDynix integrated library system (ILS), Symphony^{®4} which serves as a searchable inventory control database of all of the physical items held in the libraries' collections. These libraries coordinate cataloging practices and share one record for all formats, except for e-books. In 2006, an MSU Library taskforce looked into employing federated searching, but concluded that it was not developed enough at the time. Meanwhile, Web-scale dis-

covery technologies emerged. In January 2010, MSU began participation in a WorldCat[®] Local pilot project with the Montana State Library and a large public library. The biggest challenge encountered was related to OCLC accession numbers, which is how WorldCat[®] Local matches records between WorldCat[®] and local catalogs. MSU was a member of the Western Library Network prior to its merger with OCLC in 1999. The pre-1999 records in the catalog (approximately two-thirds of the catalog records) do not contain OCLC accession numbers. This situation caused search results to be confusing to library patrons. When a locally-owned title was searched in WorldCat[®] Local, the brief title list would indicate that MSU held the item. When a patron clicked on the link to view the full record, and the record was one without the OCLC accession number the following message would appear, "We were unable to get availability information for this item. Please check at the circulation desk for assistance." A patron would then have to search for the title again in the local catalog to see if MSU did, in fact, own the title.

Another challenge in the pilot project was that MSU uses one record for all formats (excluding e-books). However, MSU marks holdings in OCLC on all appropriate records. In order for WorldCat[®] Local to display correct results, MSU would need to have OCLC accession numbers for all the corresponding format records in the one local record. The final challenge was that MSU does not mark holdings in OCLC for everything owned, such as: United States Federal government documents, e-journals, e-books, and select other materials. If any of these materials were searched in WorldCat[®] Local, the message, "No results match your search for ..(the title searched)..when limited to MSU-Bozeman libraries" would appear.

It would be possible to have the OCLC accession numbers added to the local bibliographic records, but to do so would be a large scale project entailing an extensive clean up. The pilot allowed for the opportunity to test WorldCat[®] Local to see

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