

SEMLOL
Annual Spring Meeting Minutes
The Age of Discovery (Tools)
April 19, 2013
Wayne State University – Oakland Center

Introduction:

Joshua Neds-Fox, Coordinator for Digital Publishing at Wayne State University and SEMLOL Chair-Elect, welcomed the SEMLOL members to Wayne State University's Oakland Center. He gave a brief history of the Oakland Center, shared news from Wayne State University Libraries, and outlined the day's events.

Spring Program Presentations:

EBSCO Discovery Service

Elliot Polak elliott.polak@wayne.edu (Systems Librarian in Discovery Services) and Damecia Donahue dnd@wayne.edu (Scholarly Communications Librarian), Wayne State University

EBSCO was chosen over other discovery systems mainly due to the price. WSU had been using Encore, an older version released by III. It had a federated component but the results weren't really integrated into a central list. They wanted more content; EBSCO had a large central index and allowed for 95% of their journal holdings to be listed. It allowed searching by topic and got relevant results. It was a familiar interface. They branded it, adding their logo and widgets. Elliot pointed out features and widgets of EBSCO. Elements of implementation: Adding e-resources was easy. MARC was a little more tricky.

The Implementation Team decided to take this opportunity to look at the search box and improve it. Library staff brainstormed how to brand the EBSCO product and decided to call it *Research Warrior*. The slogan is *Stop searching. Start finding*. The beta version was launched in November of 2012. WSU kept Encore until February of 2013.

They gathered feedback from librarians and students alike using SurveyMonkey. Back end issues were repaired before the full launch.

Damecia spoke as someone who does quite a bit of instruction. In the Beta testing state, the Instruction Team emailed all reference and instruction librarians to test it. It was useful for different groups and assignments in different ways. General education groups were used as test groups with assessment via SurveyMonkey. Instruction Librarians would need to change their methods of instruction to make this work.

After testing Research Warrior, librarians came up with teaching opportunities to turn challenges into opportunities. They needed to teach users how to limit results, how to use faceted searching, and what to do with the results list.

Assessment with faculty was mostly completed on an individual basis. Many faculty responded that they got too many results. They were also not sure what students would do with all of those results, and didn't know what database knowledge the students had. SurveyMonkey was used to assess students' use of Research Warrior. Results ranged from utter confusion to happiness.

Next steps include more instruction improvements and more widgets. Instruction has been made more hands-on and students search and then evaluate and assess. The tool helped faculty to develop tool kits to teach and helped to develop assignments. It will be a collaborative and iterative process.

It was discovered that although 95% of journal holdings are covered, the scope does not include all disciplines/departments. They will be looking into how different subject areas are covered. Research Warrior makes the assumption that users have knowledge of current technology, which is not always true. The staff found that many times it is more relevant to librarians than students. Being able to understand results, understand the format, and know how to access are extremely important. Students love the Google-like search box but get confused when they see the results. Instruction is very important.

Primo (Ex Libris)

Ann Kucera ann.kucera@baker.edu (Collection Management Librarian), Baker College

Baker began their journey into a Discovery Tool with an online database committee, made up of librarians from various campuses, the Collection Management Librarian, and the Cataloger. The committee began with a spreadsheet that listed basic Discovery Tool features. It was decided that functionality and results were more important than other features. Four vendors were interviewed, plus Sirsi/Dynix. This process began in September of 2011. In December, OCLC and Summon were eliminated. At that point, the decision was between EBSCO and Ex Libris. Trials began in January 2012 and a decision was made in March of 2012. Implementation began in May/June of 2012 and the beta launch was in September of 2012.

Most of the tools had basically the same features but users noticed different functionality and results lists in the different tools. In January of 2012 when it was between EBSCO and Ex Libris, the committee was able to gain access to live sites to practice using both products. It was a very close decision, but Ex Libris/Primo had several advantages: they had FRBR; students didn't have to log in to see the results page; and the search results in the trials seemed to be more relevant to our students. Both products would cover approximately the same amount of holdings so that was not a factor in decision. Ann advised those considering a Discovery Tool not to let money be a deciding factor, as she was able to negotiate a lower price with Ex Libris.

Link resolvers were switched from EBSCO A to Z and LinkSource to Ex Libris. Setting up SFX went pretty smoothly. Setting up Primo took longer. Baker is a full-service customer so Ex Libris takes care of the back end.

Ann showed the Baker webpage and explained the search box for Primo (called Library Search – Baker may do further branding in the future). She performed a sample search and explained the facets of searching made available to users. A search widget has been placed on all LibGuides.

Databases that previously got few hits are now getting many more. A small response to the survey located under the widget on the homepage indicated that users were unhappy with the tool before January, but beginning in January (perhaps with refinement) users were much more satisfied. Some campuses added instruction on Primo to their instruction sessions with classes. However, response seems to be better in situations where the instruction is done as a demonstration. In cases where instruction is done in a hands-on situation, there are more problems. Not much assessment has been done to this point.

After Ann's presentation, members were invited to enjoy the refreshments provided during the break.

Business Meeting

Ballots were available – one per voting institution – for the slate of candidates for the Executive Board. Ballots were collected and counted by Colleen Streeter.

Returning SEMLOL board members for 2013/2014

Joshua Neds-Fox – Chair

Margaret Danowski – Past Chair

Gary Cocozzoli – Treasurer (Appointed)

Michele Pratt – Secretary

Judy Dyki – Webmaster (Appointed)

Elizabeth Bucciarelli – Archivist (Appointed)

Jonathan Scherger - Member-at-Large

Julia Daniel-Walkuski – Member-at-Large

Colleen Streeter – Member-at-Large

Election results for 2013-14:

Chair-Elect

Mariela Hristova (Oakland University)

Members-at-Large

Katrina Rouan (Wayne State University)

Karen Rogers-Collins (Eastern Michigan University)

Julia Eisenstein (University of Detroit - Mercy)

The bylaws hadn't been updated since approximately 2006. The board decided that we needed an official social media facilitator. Rather than add a position to the board for social media facilitator, the motion was on the floor to ask one of the members-at-large to take on the responsibility of social media.

Article 8, Section 4: Executive Board. The following statement will be added to the description of board members: *One of the At-Large representatives will be responsible for social media facilitation. Social media responsibilities may shift among the At-Large Representatives at the discretion of the chair.*

After no discussion, Diane Manko-Cliff (from Davenport) made a motion to approve. Mike Barnes (from Eastern) seconded. The motion to add the responsibilities of social media facilitator to one of the members-at-large positions passed unanimously.

The 2nd proposal involved accepting floor nominations at the meeting where voting will occur. Although the practice has been not to accept nominations from the floor, it was never made official.

Article 9, Section 1: Committees and Volunteers/Permanent Committees/Nominating Committee. The following revision will be made to the procedures for the Nominating Committee (revisions appear in bold text): *The Nominating Committee shall present its slate of nominees to the Membership by mail or electronically a minimum of 15 days prior to the election meeting, **if no vote is needed. Nominations will be accepted by mail or electronically up to 15 days prior to the membership meeting. Due to the need for prior approval from the dean or director of an institution, no floor nominations will be allowed.***

A motion to accept the verbiage was made by Emma DeCenso from Madonna. It was seconded by Mike Barnes from Eastern. The motion to change the bylaws passed unanimously.

The floor was opened for sharing.

Madonna will host author Mark Binelli on November 12. Binelli is the author of *Detroit City is the Place to Be: The Afterlife of an American Metropolis*.

The University of Michigan-Ann Arbor will be posting a Content Strategist position.

The University of Michigan-Dearborn will be posting a business librarian position.

That fact that we were short of a quorum was broached; could the election and bylaw changes be voted on at the meeting? Barb Kriegel made the motion that fourteen institutions would constitute a quorum for the meeting. Emily Campbell (University of Michigan) seconded. The motion passed unanimously.

Summon (Serials Solutions)

Jackie Wrosch (Systems Librarians), Karen Rogers-Collins (Electronic Resources Librarian) and Bill Marino (Online Learning Librarian), Eastern Michigan University

In 2005, Eastern used an Ex Libris product called MetaLib Search – a federated search. It was very slow and there were issues with de-duping; it caused a feeling of distrust with librarians. In 2007 that relationship ended. In 2009 the library began thinking about a Discovery product, knowing that they had to get support from the librarians. Summon and Primo were demoed. In Fall of 2010 the library received one-time funding from the University and they debated between Web of Knowledge (a Thompson database) or a subscription to Summon. The faculty and librarians voted and the vote was pretty evenly split, so the dean made the decision to invest in Summon as the Discovery Tool.

Implementation began in early 2011. A team of eight librarians from various units in the library and one library student was formed. In hindsight, they should have had staff on the implementation team.

Summon had a six week timeline for implementation. However, EMU's timeline was 32 weeks, allowing more time for back-end work and training as it was important to get it set up correctly. A big piece was correctly configuring the electronic resources. They also had to synchronize the catalog and make decisions on what records to send, deleted records, and special situations. Local resources such as the institutional repository and LibGuides have been indexed. Most configuration changes were made at EMU.

Three end-user groups were identified and surveyed. Undergraduate students loved the ease of using a single search box. However, they admitted that they would use any default search box. Graduate students didn't want to use a Discovery Tool themselves (they wanted to use the actual databases) but would promote it to undergraduate students. Faculty saw it as an answer to getting students to stop using Wikipedia.

Questions arose such as how to teach it and how to get buy-in from faculty and graduate students. Was the increased recall worth the loss of precision? It was being used to locate articles; what about locating books? Based on testing, Summon was made the default search. However, other search options were still available. In library e-instruction, Summon was used in place of Gale PowerSearch for entry level English instruction. It eliminated the need to present or teach different databases. In other courses, Summon was presented alongside discipline databases.

Both qualitative and quantitative assessments were done. All three user groups were surveyed in the qualitative assessment. The quantitative assessment looked at the number of full-text downloads (the idea was taken from a Grand Valley State survey). EMU saw an 11% increase in the number of full-text downloads, reflective of all user groups.

From 2011, fast forward to today. Summon works really well with entry-level instruction. Students exit their library instruction session saying that Summon led them to relevant material but statistics are not yet known on their feelings a month or so after the session. Faculty are using it for cross disciplinary research. Summon gives a better mobile presentation than the book catalog. However, it is deficient in serving the needs of certain disciplinary groups, such as business and nursing. Most business research is not conducive to a Discovery Tool; only two of Eastern's business databases are included in Summon. Nursing faculty want their students to search the actual databases they will use in the field; in addition, CINAHL is not included in Summon. Filtering of archival and primary sources is limited in Summon; it is more difficult to locate these resources through this Discovery Tool.

The Eastern staff is looking at the Next Gen ILS and exploring options.

WorldCat Local (OCLC)

Gretchen Weiner gweiner@ltu.edu (Head of Reference & Instruction) and Gary Cocozzoli gcocozzol@ltu.edu (Library Director), Lawrence Technological University

Lawrence Tech has used WorldCat for interlibrary loan since 1977. WorldCat Local was introduced to LTU in 2007. WCL shows books at your library, in the local area, and libraries worldwide. It also displays e-books, journal holdings, audio-visual material, open source material, and periodical article citations. WCL interacts with the ILS for real time holdings and availability. The OCLC Knowledge Base is used to build holdings.

WorldCat Local was used in full in early 2012. In the Fall of 2012, LTU moved to WorldCat Local with WorldShare. It is now their only OPAC. TechCat became TechCat+. There is no need to authenticate simply to view a list of articles. Gale and ProQuest will be added to the central index by the Summer of 2012; a disadvantage is that only select EBSCO databases are centrally indexed. Advantages of WCL are that it has a permanent URL, the ability to save searches and email lists, and tagging and other Web 2.0 features, as well as citation managers such as RefWorks, Easy Bib, EndNote, etc.

The main search can be set to query a set of specific databases only. Settings can display Lawrence Tech results (books and articles) on the top of the results list. Many settings can be changed or customized.

Gretchen spoke about the impact of WorldCat Local at Lawrence Technological University. This was a great opportunity! It was an opportunity to re-engage some users and change their approach to research. Users can search both books and articles in one place. Most patrons are familiar with the concept of a Google search and can relate to that type of search; they like getting both book and article results at the same time. Most of the freshmen students also understand how to use facets. The fact that users can search for peer-reviewed articles is a selling point.

The library is using this as an opportunity to re-evaluate and rejuvenate reference. There has been a subtle incorporation of Discovery into tools such as LibGuides, tutorials, classroom instruction, and face-to-face instruction. There has been an emphasis on the purpose of the research, the type of resources, and terminology. All situations and needs vary. The librarian should analyze patron needs to judge the best fit and gauge receptiveness. This tool eliminates the “no results found” syndrome or the patron being in the wrong database. That said, there are instances when searching a specific database is still useful. Discovery does not fully replace the need to search in the native platform. WorldCat Local is emphasized as a starting point for research.

The meeting adjourned at 4:05pm.

Submitted by: Michele M. Pratt
June 6, 2013