Discovery Overview

Marshall Breeding
Independent Consultant,
Founder and Publisher, Library Technology Guides
http://www.librarytechnology.org/
http://twitter.com/mbreeding
Online Catalog

Scope of Search

- Books, Journals, and Media at the Title Level
- Not in scope:
  - Articles
  - Book Chapters
  - Digital objects
  - Web site content
  - Etc.

Search:  

Search Results
Discovery from Local to Web-scale

- **Initial products focused on technology**
  - Mostly locally-installed software

- **Current phase is focused on index-based discovery**
  - Article-level representation: citation, abstract, full-text
  - A&I content (sometimes)
  - Local content (Harvested from ILS and other repositories)
Web-scale Index-based Discovery

Search: 

Consolidated Index

Search Results

Usage-generated Data

Customer Profile

Pre-built harvesting and indexing

ILS Data

Digital Collections

Web Site Content

Institutional Repositories

Aggregated Content packages

Open Access

E-Journals

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Bento Box Discovery Model

Search:

VuFind / Blacklight

Search Results

ILS Data

Web Site Content

Digital Collections

Institutional Repositories

Consolidated Index

Aggregated Content packages

Open Access

E-Journals

Pre-built harvesting and indexing
Library Web Presence

Public Interfaces:

Presentation Layer

- Integrated Library System
- Library Web site
- Subject Guides
- Article, Databases, E-Book collections
New Library Management Model

Unified Presentation Layer

API Layer

Library Services Platform

Consolidated Index

Search Engine

Digital Coll

ProQuest

EBSCO

JSTOR

Other Resources

Self-Check / Automated Return

Stock Management

Enterprise Resource Planning

Learning Management

Authentication Service

Smart Cad / Payment systems
Evaluating Index-based Discovery Services

- Intense competition: how well the index covers the body of scholarly content stands as a key differentiator.
- Difficult to evaluate based on numbers of items indexed alone.
- Important to ascertain now your library’s content packages are represented by the discovery service.
- Important to know what items are indexed by citation and which are full text.
- Important to know whether the discovery service favors the content of any given publisher.
Discovery Ecosystem

- Primary Publishers
- Secondary: A&I, Aggregators
- Libraries
- Library Customers
- Discovery Service Providers
Tension and Complexity

- Intersection of roles leads to tension and complexity
- What are the ties between Discovery and Resource management systems?
- Are their ties between Content provision and discovery
Multi-Role Stakeholders

- **Content provider / Discovery Service**
  - EBSCO Information Service
  - ProQuest

- **Resource Management / Discovery Provider**
  - OCLC
  - Ex Libris
Discovery Concerns

- Important space for libraries and publishers
- Discovery brings value to library collections
- Discovery brings uncertainty to publishers
- Uneven participation diminishes impact
- Ecosystem dominated by private agreements
- Complexity and uncertainty poses barriers for participation
Discovery index issues

- Indexing full-text enables keyword-based relevancy
- Citations or structured metadata provide basic terms to support search & retrieval and faceted navigation
- A&I terms provide access points, relevancy indicators that cannot be reproduced algorithmically
- Important to understand what is indexed
  - Currency, dates covered, full-text or citation
  - Many other factors
Collection Coverage?

- To work effectively, discovery services need to cover comprehensively and evenly the body of content represented in library collections.
- What primary publishers participate?
- What secondary or A&I publishers participate?
- Is content indexed at the citation or full-text level?
- What are the restrictions for non-authenticated users?
- How can libraries understand the differences in coverage among competing services?
State of Discovery indexes

- Very strong coverage of primary publishers of scholarly materials
  - Especially English and other Western Languages
- Weaker coverage of scholarly content in other international regions
  - Asian languages, Arabic, etc.
- Mixed coverage of A&I resources
- Mixed converge of non-textual resources
A&I Content in Discovery Services

- What is the place for A&I services in the discovery ecosystem?
- Are there technology solutions capable of substituting for A&I content?
  - Specialized and scoped search methodologies
  - Clustering, term extraction, etc.?
- Specialized vocabulary and other metadata make positive contributions to the discovery process.
- Researchers value A&I tools.
Participation of A&I in Discovery

- Libraries expect participation
- A&I providers have concerns:
  - Fear that inclusion in discovery will devalue A&I subscriptions
  - If content not positioned well, libraries may not see evidence of value and drop subscriptions
- How is the brand of A&I presented to users when accessed through discovery interface
- Statistical validation of contributions of A&I to resource selection in discovery services
Challenge for Relevancy

- Technically feasible to index hundreds of millions or billions of records through Lucene or SOLR
- Difficult to order records in ways that make sense
- Expectation that relevancy be neutral relative to content source or publisher
- Many fairly equivalent candidates returned for any given query
- Must rely on use-based and social factors to improve relevancy rankings
Library Technology Reports

- The Current State of Library Resource Discovery Products: Context, Library Perspectives, and Vendor Positions

- In press for Publication January 2014
LTR Components

- Vender questionnaire
- Library Survey
- Industry announcements
- Other articles and publications
Library Discovery Survey

- Survey executed to gather data from libraries regarding their experiences with discovery services
- Responses received by 396 Libraries:
  - 29 Countries represented, 252 responses from United States

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Objectivity in Discovery: Academics

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Update on the NISO Open Discovery Initiative
Balance of Constituents

**Libraries**
Marshall Breeding, Vanderbilt University
Jamene Brooks-Kieffer, Kansas State University
Laura Morse, Harvard University
Ken Varnum, University of Michigan
Sara Brownmiller, University of Oregon
Lucy Harrison, College Center for Library Automation (D2D liaison/observer)
Michele Newberry

**Publishers**
Lettie Conrad, SAGE Publications
Roger Schonfeld, ITHAKA/JSTOR/Portico
Jeff Lang, Thomson Reuters
Linda Beebe, American Psychological Assoc
Aaron Wood, Alexander Street Press

**Service Providers**
Jenny Walker, Ex Libris Group
John Law, Serials Solutions
Michael Gorrell, EBSCO Information Services
David Lindahl, University of Rochester (XC)
Jeff Penka, OCLC (D2D liaison/observer)
## ODI Timeline

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ODI deliverables

- Standard vocabulary
- NISO Recommended Practice:
  - Data format & transfer
  - Communicating content rights
  - Levels of indexing, content availability
  - Linking to content
  - Usage statistics
  - Evaluate compliance
- Inform and Promote Adoption
ODI Recommended Practices

- Metadata elements for content providers to contribute to discovery service providers
- Content providers disclose extent to which they participate with each discovery service
- Discovery Service providers disclose what content is represented in index
- Discovery services disclose any bias in search results or relevancy relative to business relationships
- Discovery services provide use statistics
ODI Standing Committee

- Fulfilling recommendation of the ODI that NISO charge an ongoing committee to promote ODI best practices and related issues.

- Discussions may include but are not limited to:
  - brainstorming on ways to publicize and educate the community on ODI
  - answering any support questions
  - checking on status of vendor support
  - liaising with other standards efforts as applicable
  - determining when is an appropriate time to consider updating ODI
ODI Standing Committee Roster

- Laura Morse – Harvard University
- Lettie Conrad – SAGE
- Aaron Wood – Ingram Content
- Elise Sassone – Springer
- Jason Price – SCELC
- Jill O’Neill – NFAIS
- Julie Zhu – IEEE
- Marshall Breeding – Independent Consultant
- John McCullough – OCLC
- Michael McFarland – Credo
- Rachel Kessler – Ex Libris
- Scott Bernier – EBSCO
- Steven Guttman – ProQuest
- Ken Varnum – University of Michigan Library
Advise Discovery to Delivery Topic Committee on possible areas of future interest or activity

Overview of the current state of library resource discovery

Recommendations for next stages of ODI

API ecosystem: extend and interoperate

Discovery beyond the library

Importance of Linked Data on future models of discovery

Extend keyword relevancy to leverage Linked Data
The future of Resource Discovery

- More comprehensive discovery indexes
- Stronger technologies for search and retrieval
- Discovery beyond library-provided interfaces
- Linked Data to supplement discovery indexes
Linked data

- Not yet a fully operational method for library-oriented content
  - Increasing representation of bibliographic resources
  - BIBFRAME stands to make great impact
- Universe of scholarly resources not well represented
- Will current expectations for content providers to make metadata or full text available for discovery expand to exposure as open linked data?
Hybrid models

- Can index-based search tools be improved through Linked Data
  - Browse to related resources
  - Add additional hierarchies of structure to search results
Discovery beyond Library Interfaces

- Improved performance of library content through Google Scholar
  - Same expectations for transparency?
- Better exposure of library-oriented content
  - Schema.org or other microdata formats
- Better exposure of scholarly resources
  - Open access & Proprietary
- Embedded tools in other campus interfaces
Collaborative discovery: ODI Provider Perspective

Andrew K. Pace
Executive Director, Networked Library Services
OCLC
Agenda

• The challenges of something like ODI
• What is one discovery service (OCLC) doing to address the ODI guidelines?
• Reminder: Discovery does not always happen in the library (or even on the library website)
• Reminder #2: Yeah, but we sill need a user interface
Selfish Context

WorldCat® Discovery Services

- Access to WorldCat
- Indexed Search
- Discoverability on the Web
- Discovery API
Disclaimers

• If you’re sill using an OPAC, I’m sorry
• Thanks to Silicon Valley, the “generation” in “next-gen” is so short that “next-gen” loses all meaning
• Despite OCLC resources, my first market research team is often 2 people
Challenges of ODI

• Librarians, especially librarians in IT, are always looking for technical solutions to legal, business, and political problems

• Service providers, vendors, publishers are always looking for Unique Selling Points (USPs) in markets offering commoditized content and state-of-the-art systems

• Two trains problem:
  content providers are hedging on providing the very content that will improve recall, precision, and fulfillment

* Used without any permission whatsoever
What is OCLC doing about ODI?
1. Participating

- In the person of John McCullough, Sr. Product Manager for Discovery
2. Staying Neutral

- OCLC is the only provider with the Big 3 in its central index: ProQuest, EBSCO, Gale
- As well as the big journal players: Elsevier, Emerald, JSTOR, Springer, Taylor & Francis, Wiley
3. Pursuing Transparency

• How many of you think....?
### 4. Paying attention

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Reminder: Discovery does not always happen in the library (or even from the library website)
WorldCat partner traffic
July 2013-June 2014

79 million referrals from partner sites
8.6 million click-throughs to libraries
...this is a good moment for academic libraries to step back to reconfirm (or reconsider) their vision for discovery...

Roger Schonfeld,
“Does Discovery Still Happen in the Library?”
Ithaka S+R Oct2014
From the field...(part 2)

In short, we need to make libraries interoperable with the web. There are at least three ways of heading in this direction:
1. APIs
2. Linked Data
3. The Library Graph

David Weinberger,
“Let the Future Go”

Library Journal Sept 2014
Reminder: Yeah, but we still need a user interface
And it must (or should)....

Empower Discovery....AND FULFILLMENT

• Help me find physical objects of multiple formats and communicate their availability

• Link directly to online full text through a knowledge base or a local OpenURL resolver

• Allow me to borrow from another library through ILL integration

• Buy items directly from content providers
And it must incorporate responsive web design
But can it please not be mutually exclusive of all the stuff that Weinberger and Schonfeld are talking about?
Beyond “state-of-the-art” Discovery

GOTTA Dos: “The Iron Triangle”
- Relevance
- Works / Editions displays
- Full text linking

COOL NEW STUFF
- Linked Data
- Works Records
- Discovery API
- Knowledge Cards
OCLC releases WorldCat Works as linked data

DUBLIN, Ohio, 28 April 2014—OCLC has made 197 million bibliographic work descriptions—WorldCat Works—available as linked data, a format native to the Web that will improve discovery of library collections through a variety of popular sites and Web services.

Release of this data marks another step toward providing interconnected linked data views of WorldCat. By making this linked data available, library collections can be exposed to the wider Web community, integrating these collections and making them more easily discoverable through websites and services that library users visit daily, such as Google, Wikipedia and social networks.

"Bibliographic data stored in traditional record formats has reached its limits of efficiency and utility," said Richard Wals, OCLC Technology Evangelist. "New technologies, influenced by the Web, now enable us to move toward managing WorldCat data as entities—such as "Works," "People," "Places" and more—as part of the global Web of data.

OCLC has created authoritative work descriptions for bibliographic resources found in WorldCat, bringing together multiple manifestations of a work into one logical authoritative entity. The release of "WorldCat Works" is the first step in providing linked data views of rich WorldCat entities. Other
David and Goliath: Underdogs, Misfits, and the Art of Battling Giants by Malcolm Gladwell (Oct 1, 2013)

David and Goliath: The Triumph of the Underdog by Malcolm Gladwell (Oct 1, 2013)

David and Goliath by Ifeanyi Esimai (Dec 8, 2013)
Blink: the power of thinking without thinking
by Malcolm Gladwell

Held by: OCLC Library
Languages: English, French, Spanish, German

Available Main Branch MAIN STACKS 973.923 K87j
WorldCat Discovery API

- Access to WorldCat and the central index
- Linked Data response formats
- Facet functionality
- Access to the latest data models, including entities

Build your own interface, or add WorldCat results to your existing Discovery service

*Beta now availability for libraries*
Knowledge Card

Arthur C. Clarke - Wikipedia, the free encyclopedia
en.wikipedia.org/wiki/Arthur_C_Clarke
Sir Arthur Charles Clarke, CBE, FRAS (Sri Lankabhimanya Arthur Charles Clarke) (16 December 1917 – 19 March 2008) was a British science fiction writer, ... Arthur C. Clarke bibliography - Rendezvous with Rama - Koneswaram temple

Sir Arthur C. Clarke
www.arthurclarke.net/
Research and discussion site for sci-fi writer Arthur C. Clarke.

The Arthur C. Clarke Foundation | Something Wonderful
www.clarkefoundation.org/
Organization aimed at advancing concerns of author.

Arthur C. Clarke - IMDb
www.imdb.com/name/nm0000209/

Arthur C. Clarke - Wikiquote
en.wikiquote.org/wiki/Arthur_C_Clarke
Perhaps it is better to be un-sane and happy, than sane and un-happy. But it is the best of all to be same and happy. Whether our descendants can achieve that ...

Arthur C. Clarke Quotes - The Quotations Page
www.quotationspage.com/quotes/Arthur_C_Clarke/
Arthur C. Clarke, Address to US Congress, 1975. When a distinguished but elderly scientist states that something is possible, he is almost certainly right.

Amazon.com: Arthur C. Clarke, Books, Biography, Blog, Audibooks ...
www.amazon.com: Books, Science Fiction & Fantasy, Science Fiction ...
Results 1 – 12 of 139. "SIR ARTHUR C. CLARKE (1917-2008) wrote the novel and co-authored the screenplay for 2001: A Space Odyssey. He has been knighted ...
Malcolm Gladwell

September 3, 1963-
Role: Author

Malcolm T. Gladwell, CM (born September 3, 1963) is a Canadian journalist, bestselling author, and speaker. He has been a staff ...

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<td>April 2014</td>
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<tr>
<td>Linked data modeling in WorldCat Discovery</td>
<td>Early 2015</td>
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<tr>
<td>Support for persons entities, Knowledge Cards</td>
<td>January 2015</td>
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<tr>
<td>Support for WorldCat Works display in WorldCat Discovery</td>
<td>Spring 2015</td>
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Closer than you think...
Some brief conclusions

• NISO Open Discovery Initiative: libraries, content providers, and discovery service providers should pay attention

• ODI should be considered in the context of discovery happening outside the library

• Discovery service decisions should be made in the context of discovery happening outside the library

• Libraries will make use of discovery services for a long time to come—the data strategies and features that benefit ODI, discovery applications, and discovery outside the library DO NOT have to be mutually exclusive
Discovery in Practice

Right Now We Just Want it to Work
Hi, I’m Allie

Portland Community College/Orbis Cascade Alliance
- Primo*
- WorldCat Local
- OPACs gone by

*Shared ILS development
You spend a lot of time on discovery projects...

How does ODI factor into your work?

It doesn’t.

Right now we just want it to work.

Maybe when it works we’ll have time to care.

I wasn’t sure anyone really talks about ODI, so I asked..
The SILS Discovery Working Group, the broader SILS Implementation Team, and Alliance staff have been working with EBSCO and Ex Libris to resolve concerns we have about the accessibility of EBSCO content via Primo. There are workarounds and less desirable approaches, but the core issue is that these two companies have not reached a complete data-sharing agreement.

- Alliance Board letter to EBSCO and Ex Libris, May 2, 2013
- Ex Libris response to Alliance Board, May 6, 2013
- EBSCO response to Alliance Board, May 8, 2013
- Alliance Board response to EBSCO and Ex Libris, May 9, 2013
- Ex Libris Open Letter to the Library Community, May 14, 2013
- Ex Libris analysis of points raised by EBSCO in their May 8, 2013 letter
- EBSCO Announces New Open Policy on Metadata Sharing, April 18, 2014
- Ex Libris Response to the EBSCO Policy for Metadata Sharing & Collaboration, April 21, 2014
- Alliance Board letter to EBSCO and Ex Libris, June 5, 2014
- Ex Libris response to Alliance Board, June 5, 2014
- EBSCO response to Alliance Board, June 9, 2014
- **EBSCO letter to customers regarding support for recommendations of ODI, June 26, 2014**
- Alliance letter to EBSCO and Ex Libris, October 3, 2014
- Ex Libris' Update on Ex Libris Discussions with EBSCO, October 6, 2014

We are discussing ODI, but we may not know it.
Is ODI a bridge to “Making it Work”?
“A content provider might allow certain metadata elements to be included in the search index for retrieval purposes, but not allow those elements to be displayed in the final user interface.”

This.
“Some elements might be displayed to authenticated users, and some not, but definitions of these distinctions are sometimes vague, if they are described at all.”

Often completely mysterious, spooky even.
The ODI recommends that content providers disclose their level of participation in discovery services to library subscribers. For each market product (journal collection, A&I database, etc.), content providers should disclose the coverage depth and content depth provided.

Please. It will save us all headaches.
“Many comments throughout the research revealed a need for more transparency and educational dialog between discovery providers, content providers, and libraries.”

We generally do not speak the same language without effort and practice.
Next Steps

- collaborative discussion
- APIs
- managing “restricted” content
- reporting on content at the collection level
- on-demand lookup by users
- monitoring fair/unbiased linking
- more with COUNTER
- needs of A&I service providers

This is where you come in.
Wish List

Addressing Content Providers who are also Discovery Service Providers.

Are they business decisions or technical issues?