

September 2013

Beyond Discovery Tools: The Evolution of Discovery at ECU Libraries

Virginia Bacon

East Carolina University, baconv@ecu.edu

Ginny Boyer

East Carolina University, boyerg@ecu.edu

Follow this and additional works at: <https://docs.lib.purdue.edu/atg>



Part of the [Library and Information Science Commons](#)

Recommended Citation

Bacon, Virginia and Boyer, Ginny (2013) "Beyond Discovery Tools: The Evolution of Discovery at ECU Libraries," *Against the Grain*: Vol. 25: Iss. 4, Article 11.

DOI: <https://doi.org/10.7771/2380-176X.6563>

This document has been made available through Purdue e-Pubs, a service of the Purdue University Libraries. Please contact epubs@purdue.edu for additional information.

Beyond Discovery Tools: The Evolution of Discovery at ECU Libraries

by **Virginia Bacon** (Electronic Resources Access & Discovery Librarian, Joyner Library, East Carolina University) <baconv@ecu.edu>

and **Ginny Boyer** (Head, Application & Discovery Services, Joyner Library, East Carolina University) <boyerg@ecu.edu>



Introduction

At **East Carolina University (ECU) Libraries**, the term “discovery” has been in a state of evolution over the past few years. “Discovery” initially became an important part of librarians’ vocabulary with the introduction of a new kind of library system called the “discovery layer,” “service,” or “tool.” Examples of this include commercially available products such as **Serials Solutions’ Summon**, **EBS-CO’s EDS**, **OCLC’s WorldCat Local**, and **Ex Libris’ Primo**. Since their introduction several years ago, many academic libraries have adopted these tools to help users uncover more of their collections in a **Google-like** search environment. **Thomsett-Scott** and **Reese** provide a comprehensive review of how the selection, maintenance, and evaluation of these tools have been discussed in library literature.¹ But while discovery tools have been written about extensively, the idea of discovery has now evolved beyond just the tools. At **East Carolina University (ECU) Libraries**, the term “discovery” encompasses a broader set of considerations, including overall usability of the libraries’ search tools; how design of user experience facilitates resource discovery; integration of the libraries’ Websites as an essential piece of the discovery framework; and overall access and retrieval concerns that impact the libraries’ ability to provide an optimal information seeking experience for library users. This article discusses the efforts undertaken at **ECU Libraries** that reflect this broadened understanding of “discovery.”

ECU is served by three physically distinct libraries led by two separate administrators. Together, the main J.Y. Joyner Library and the smaller Music Library are called Academic Library Services (ALS), and report to one dean. Laupus, the health sciences library (HSL), has its own director. ALS and HSL are further separated by being located on two different campuses; ALS is on the main campus of ECU, while HSL is located a few miles away on the health sciences campus. ALS and HSL share an ILS and an ERMS but historically have maintained separate Websites and online catalogs. The issue of shared discovery interfaces manifested itself initially in a Discovery Committee charged with providing leadership and vision for the libraries’ suite of search tools. To ensure equitable representation for all, membership of the committee consisted of staff from all three libraries and the group adopted a co-chair model with a representative chair from both ALS and HSL. Although the acquisition of **Serials Solutions’ Summon** prompted the creation of this committee, its purview soon expanded to include the **SirsiDynix Sympho-**

ny ILS online catalog, **WorldCat Local**, and other peripheral tools and repositories that provide shared information search portals. The committee’s charge quickly evolved to include crafting a shared discovery vision for the **ECU Libraries** and seeing that vision to fruition. The systems and interfaces under the purview of the committee suffered from many problems, including poorly designed and outdated search tools, duplication of effort and resources, and a multiplicity of access points to shared resources. All of these issues together resulted in a fragmented user experience for the discovery of library resources. To say that there was work to be done was an understatement!

Operating within the confines of two culturally distinct libraries, led by two separate administrators with differing agendas, the committee’s work required both intense collaboration across libraries and the flexibility to complete initiatives in a timely manner. As the activities of the group grew in scope, workflow dynamics and individual responsibilities became unwieldy. It was decided that the libraries needed focused leadership for its discovery initiatives.

A permanent position for a Discovery Services Librarian was created, complete with dedicated staff to support the highly technical needs of application development and support. The Discovery Services Librarian now chairs the committee and is responsible for leading discovery efforts for **ECU Libraries** and providing a seamless discovery experience to the **ECU** community. Though much of the work is still ongoing, efforts at improving discovery have so far fallen into three categories: (1) developing a shared discovery experience for ALS and HSL, (2) creating and promoting an “**ECU Libraries**” brand, and (3) improving the usability and design of discovery interfaces.

Moving Towards a Shared Discovery Experience for the Libraries

When the libraries acquired **Summon**, ALS and HSL each maintained a separate instance of the library catalog. Both libraries maintained individual item codes to identify their collections and felt as though distinct catalogs were necessary to ensure that patrons could effectively drill down to library-specific collections. HSL in particular felt that it was important for its users to be able to easily access HSL-specific collections without having to wade through search results unrelated to health sciences. During the implementation of **Summon**, the libraries elected to load their catalogs’ MARC records into the **Summon** knowledge-base. This resulted in the need to develop a shared catalog to link to from records within

Summon’s search results. After the **Summon** implementation, the catalog consolidation was the first project that the libraries collaboratively undertook to develop and promote a shared tool in support of discovery. The Discovery Committee drafted a shared proposal to both library administrators which detailed the necessity of a shared catalog and the need for the libraries to work together in support of the broader **ECU** community. It was a grassroots movement facilitated by staff from across the libraries, and it set in motion a multitude of successive projects that furthered the spirit of collaboration and improvement of the libraries’ discovery experience. The library catalog project required the Discovery Committee to task a working group with representation from each library to build a tool that equally suited the needs of all. Work on this project required extensive collaboration, continuous communication, and, perhaps most importantly, the ability of both libraries to make concessions in support of the discovery needs of all **ECU Libraries** patrons.

After the successful catalog consolidation, other projects emerged that were necessary to support a shared discovery experience. A shared **ECU Libraries** Webpage was created to serve as a single landing page for shared tools as well as a “front door” to access each individual library’s Website. This page was replicated on an **ECU Libraries** tab that was embedded into **ECU’s** instance of the Blackboard learning management system. One of the larger projects undertaken involved the consolidation of interlibrary loan operations, including a merge of the request databases and standardization of account creation so that users from both campuses can log in to the same system with their **ECU** username and password. Another project was to create a shared Ask-a-Librarian service which involved funneling all inquiries through one single “help” account and routing requests to an individual library as necessary. A shared purchase request form was put in place with the ability to place holds on items across libraries, no matter the students’ physical campus affiliation (e.g., a medical student on the health sciences campus could request a book from the library on the main campus). The libraries also instituted a cross-campus courier service to transport materials between libraries. This new activity extended service from all libraries to the larger **ECU** community. A single, online Reserve Desk was engineered to function

continued on page 30

within the shared catalog to serve all libraries. Finally, the libraries undertook consolidation of two separate instances of **WorldCat Local**, crafting a single search environment within **WorldCat** scoped specifically to the collections of the **ECU Libraries**.

Creating and Promoting the “ECU Libraries” Brand

An essential part of creating an improved shared discovery experience for the **ECU Libraries** was to establish a single name and identity for the two libraries. Creating a shared brand was desirable for practical reasons because the interfaces that had previously been labeled as “Laupus” or “Joyner” now needed a label that was inclusive of both. This helped create a seamless navigation experience for users as they moved among various interfaces. The committee also felt that it would send the important message to library users that both libraries are part of **ECU** despite being on two different campuses. The branding reinforces the shared mission to serve all **ECU** users, regardless of campus affiliation. Because the libraries are administratively separate, there was no formally established term that encompassed them both. However, the two libraries had collaborated on various efforts in the past, primarily involving e-resource acquisition, and the phrase “**ECU Libraries**” was already used to refer to other shared initiatives. The Discovery Committee felt that since it had already been used historically, “**ECU Libraries**” was a logical choice for branding the new shared discovery interfaces. Adding to the practicality of this choice was an “**ECU Libraries**” wordmark that had been created by a designer at HSL. This wordmark only needed to be tweaked slightly before being deployed across shared interfaces (see Figure 1).

ECU Libraries

Figure 1.

The “**ECU Libraries**” wordmark and phrase were used to brand all of the new, shared discovery interfaces, including the **OPAC**, **Summon**, and **WorldCat Local**. Other newly shared parts of the libraries’ Websites, such as **ILL** and **LibGuides**, were also branded as **ECU Libraries**. The phrase is also starting to appear on some printed materials promoting these tools. Another important category of interfaces to receive this branding is e-resources. The libraries now have uniform branding across platforms that offer customization options for subscribing libraries. Because **ECU Libraries** have access to dozens of interfaces, it was a significant project to brand all of them. Major platforms such as **EBSCOhost**, **Proquest**, and **ScienceDirect** were branded right away, but it would have been time consuming to individually brand each of the dozens of platforms that offered customization. Instead, the branding of those smaller platforms was integrated

into the annual e-resource use statistics gathering process.

Promotion of **ECU Libraries** branding is ongoing as new e-resources are acquired and other e-resource platforms allow this customization. Furthermore, all future shared discovery interfaces will continue to receive the **ECU Libraries** branding. These branding efforts will reinforce the collaborative nature of the libraries’ work; emphasize to library users that both libraries exist to serve the entire **ECU** community; and provide a seamless, unified identity for discovery interfaces. In addition to branding tools and resources with this collaborative label, new positions created at either library have the **ECU Libraries** moniker included in their job descriptions. Not surprisingly, many of these positions (such as the Discovery Services Librarian and the Electronic Resource, Access & Discovery Librarian) operate in the discovery arena. The addition of this label emphasizes to new hires — as well as to everyone in the libraries — that it is their responsibility to further and promote the **ECU Libraries** for the benefit of all.

Improving Usability and Design of Discovery Interfaces

Apart from creating a shared discovery experience and brand for the **ECU Libraries**, it was also imperative that the usability and design of discovery interfaces be improved. As mentioned above, many interfaces were poorly designed or outdated, and there were often a confusing number of access points for any given resource. For each interface that was updated, the design principles of simplicity and consistency were applied. In addition, the committee consulted various stakeholders from different departments every step of the way in order to get as many perspectives as possible on the diverse needs of library users. Many user interfaces had been designed with the wrong audience — librarians — in mind. For the updated interfaces, it was essential that a new focus was placed on designing for the correct audience: the library user.

“One Search” is the name that **ECU Libraries** decided to give to their shared instance of **Summon** in order to emphasize the one stop, **Google**-like search experience. The previous

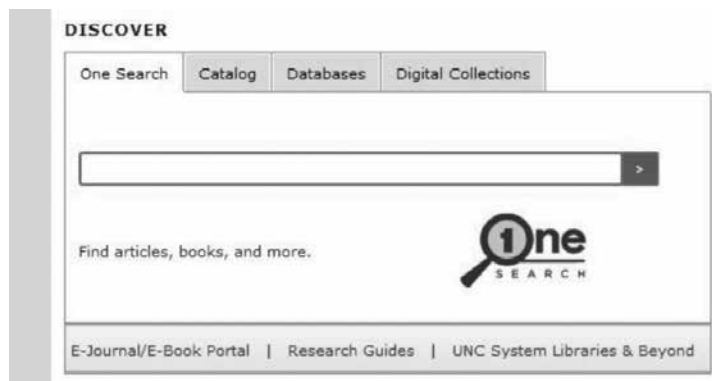


Figure 2.

widget (see Figure 2) on the ALS Website used a tabbed structure that defaulted to a One Search box but made users select a different tab to see other search options. This design crowded the search box with links both above and below. Often users would not venture beyond the initial, prominent tab and would not encounter the other tools and resources available to them. Additionally, to the right of the search box was a large, colorful “One Search” icon. This icon appeared to be the button to click to initiate a search, but the actual button was located in the rightmost portion of the search box. This previous design resulted in a confusing array of navigation and search options that cluttered the ALS homepage. To add to the confusion, each of the libraries offered a different search widget on their respective homepages.

The redesign and implementation of the One Search widget across multiple library Web presences is a great example of how these principles were applied. The One Search widget is the primary search and discovery area on the libraries’ home pages. On these pages the One Search box is featured prominently and is accompanied by links to other shared library resources and collections. For the redesigned widget, the tabbed structure was abandoned. This change helped to simplify the interface and emphasized One Search as the primary gateway to the libraries’ collections. Links to the Database List and OPAC were initially offered on separate tabs, but in the new design were integrated below the One Search box so

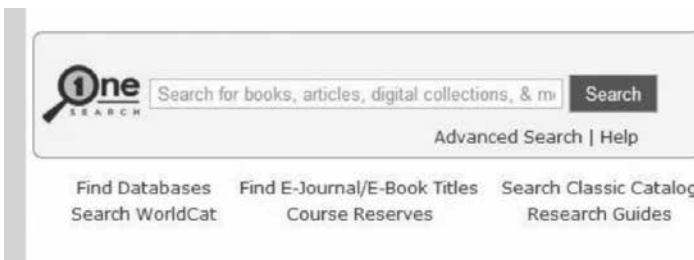


Figure 3.

that all non-**Summon** interfaces were linked to in a consistent manner. In addition, links were offered to **WorldCat Local**, **Course Reserves**, **LibGuides**, and the **E-Journal/E-Book Portal** just below the primary One Search box. The tab for **Digital Collections** was duplicated by

continued on page 31

STOP SEARCHING.

THE HEALTH SCIENCES EBOOKS
YOUR PATRONS WANT

EASILY INTEGRATED WITH
YOUR INSTITUTION'S WORKFLOW

START FINDING.

R₂ DIGITAL LIBRARY

50 STM publishers,
1 web-based platform

Select the eBooks you need from thousands
of best-selling current resources

Intuitive interface optimized for
health sciences content

IF YOU HAVEN'T SEEN US LATELY,
VISIT R2LIBRARY.COM AND
START YOUR 30-DAY FREE TRIAL.



Rittenhouse Book Distributors, Inc.
511 Fehleley Drive, King of Prussia, PA 19406

Beyond Discovery Tools from page 30

a link elsewhere on the homepage, so it was eliminated completely. The One Search icon was moved to the left of the search box, and the search button was resized and clearly labeled with the word "Search." Finally, labels for links to tools and resources were adjusted to avoid library-specific jargon and to better convey to library users where each link would take them. For example, the link labeled "E-journal/E-book Portal" was changed to read "Find E-journal/E-book titles." The result of these changes is a cleaner design with clear navigation and search options (see Figure 3). This redesigned widget was deployed across all of the libraries' Websites and on the **ECU Libraries** landing page. By applying the same basic principles of good design to other redesigned interfaces, the discovery experience of library users has been greatly improved.

Conclusion

The **ECU Libraries** have achieved many successes in their multiple collaborations as they work towards an optimal user experience, but much work remains to be done. Many projects are in the early stages of planning or already underway, so the discovery landscape of the **ECU Libraries** will continue to evolve. The libraries collectively acknowledge the

need to conduct a formal usability study to gauge the true successes of their initiatives and identify further areas of improvement that are data- rather than perception-driven. Additional concerns have surfaced that need to be addressed as we move further down the path of consolidating tools, resources, and operations. Primary among these is how far toward a combined Web presence we can go while the libraries continue to operate under two separate administrations. A Spring 2013 program review initiated by the University may help to inform on future directions related to this issue. There is also a concern that we may end up building a third "**ECU Library**" rather than working toward a true combined online presence. While these concerns do muddy the waters, it is clear that the **ECU Libraries** have fostered their growth beyond labels of particular tools to encompass what could best be described as an institutional ethos of support for the user experience. With this focus at the forefront, the discovery framework of the libraries will only continue to improve in support of the goals and mission of the libraries and the University at large. 🌱

Endnotes

1. Thomsett-Scott, B. and Reese, P. (2012). Academic libraries and discovery tools: a survey of the literature. *College & Undergraduate Libraries* 19 (2-4), 123-143.

Rumors from page 16

Street Press' Underground and Independent Comics, Comix, and Graphic Novels. Is your library purchasing graphic novels? I think I put that as an **I Wonder Wednesday** question on the Website. Have to check. If not, will use it this week. www.against-the-grain.com/

Speaking of **Dennis**, he is going to be in Charleston with his lovely wife **Cathy** who is recovering from a lengthy sickness! We need to welcome them both!

And, PS, **Jerry Spiller** should also be around at the Conference. He is a librarian and teaches at the **Art Institute** in downtown Charleston!

Dennis and I were commiserating about the death of **Elmore Leonard**, one of our favorite popular writers. **Mr. Leonard** has 10 rules for good writing of fiction and one of them is not to use exclamation points but two or three times in every 100,000 words. Guess it's a good thing that I am not writing fiction!

And we have another new columnist, **Allison Day!** Hopefully her first column will be in the November **Charleston Conference** issue. **Allison**, special collections librarian at **Western Kentucky**, came to us via the fab **Jack Montgomery**. She will be writing about hidden special collections in libraries. I am looking forward to learning more!

continued on page 63