October 2016

If Rumors Were Horses

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**Charting Discovery**

by Jesse Holden (Head, Acquisitions, USC Libraries, University of Southern California)  <jholden@usc.edu>

Discourse about and including the idea of discovery has become ubiquitous with the recent rise of Web-scale discovery services. So complete has this technological (not to mention lexical) revolution been that the correlation between “library” and “discovery” seems fairly obvious and natural today.

Of course, libraries have always been about discovery on one level or another. But this emerging concept moves away from previous notions of what it means to discover and, by extension, what it means to search. A curious way to mark the paradigmatic shift already underway is to look at how librarians themselves view discovery.

The 1943 *A.L.A. Glossary of Library Terms* (“Prepared under the Direction of the Committee on Library Terminology”) does not include an entry for “discovery.” This omission may already seem odd, so common is the use of the term at present. It may help to take a step back, then, and ask: What was the official definition of “library” in 1943? Answer: A library is “a collection of books and similar material organized and administered for reading, consultation, and study.” Also, it is a “room, group of rooms, or a building” designated for said purpose. This definition conveys two things about the library: first, its inherent materiality; second, the implication that the library is (or contains) a collection of relatively known things. The idea of discovery in this context can only be in a very limited sense; that is, whatever information materials are available in the surrounding room(s) or building. The library was an island to be explored, perhaps, but the information within had already been discovered.

Likely it is not surprising that the 1943 Glossary lacks a definition of discovery. However, it is interesting to note that the contemporary Online Dictionary for Library and Information Science, the open access resource from ABC-CLIO, also lacks a defined concept of discovery. The closest entry is, in fact, “discovery service,” which is defined foremost as “an interface.” Such a technological ontology for the term can be expected given that much of our conceptual development of the idea of “discovery” the past few years has been technology-driven. Regarding the “library,” it is worth noting that the Online Dictionary provides rather a more nebulous definition, indicating that a library is “organized to facilitate

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**If Rumors Were Horses**

Big Drumroll!!!!  Your friend and mine, Anthony the most outstanding Watkinson has been selected to receive the ALPSP Council Contribution to Scholarly Publishing Award this year. The Award is nominated by ALPSP Council and is for outstanding individuals or organizations who, as the name of the award suggests, have made a major contribution to scholarly publishing. The Award will be presented at the ALPSP Awards Dinner on Thursday, September 12. Dr. Audrey McCulloch is the Chief Executive of ALPSP. Huge congratulations, Anthony!

Was super-excited to learn that CRL has announced the appointment of brimming-with-energy Christine Stamison as the new director of NERL. Christine succeeds Joan Emmet, who led NERL since 2011. In her new capacity, Christine will negotiate pricing and terms of use for the hundreds of databases and e-journal and eBook packages licensed or purchased on behalf of NERL’s 28 members and 80 affiliates, and will work with the NERL Board, Program Council, and CRL to increase these libraries’ return on their investment in electronic resources. The appointment is effective September 3. Christine has considerable experience in the electronic publishing and the information marketplace. With over thirty years in the private and public sectors, working for both subscription vendors and academic libraries, she brings extensive knowledge of the information industry and a valuable set of skills to the NERL program. She has worked in technical services and periodicals at the University of Illinois at Chicago, and also directed the Serials Orders Section at the University of Chicago.
From Your (frantic) Editor:

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all semester has begun with all its frantic-ness. Time to develop new budgets, orient new faculty, finish annual reports, that sort of thing. And to top it all off — my daughter Ileana is getting married in 42 days! Talk about questions, decisions, phone calls, and bills, bills, bills!

I was excited to have this issue to take my mind off all this frantic stuff. Edited by the magnificent Jesse Holden, this issue deals with discovery which is all about search and find. Follow Scott R. Anderson, Sam Brooks, Eddie Newirth and Harrison Cain, and Virginia Bacon and Ginny Boyer as they help us explore the new information ecosystem that discovery has created.

Our Special Report is by David Parker about Content, Services, Solutions and Space, they are, what great work they are doing, and how they shouldn’t worry about the future of libraries. I would suggest, for example, that inviting a university president who cut libraries and explained why this step was taken is much more useful than inviting one who loves libraries. I’m of the opinion that librarians would learn a lot more from the first speaker than the second.

Conferences on how great librarians are, complete with a symbolic singing of Kumbaya at the end, are great for feeling good but don’t lead to much learning. Hearing from the “enemy” is often one of the best ways to learn how to do better or, at a minimum, to understand an alternative viewpoint.

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Regenstein Library, NERL was founded by Ann Okerson at Yale University in 1996, as a consortium of research libraries that licenses high cost online products on behalf of its membership. Earlier this year NERL entered into a strategic partnership with the Center for Research Libraries (CRL), to afford North American research libraries greater leverage in acquiring and subscribing to key electronic resources, and to shape the terms of access to those resources. On July 1, NERL began operating as a cooperative program under the organizational umbrella of CRL in Chicago.

This is a great issue of ATG guest edited by the awesome Jesse Holden. There are a lot of great papers but the one which caught my eye the most was the one by Scott Anderson about mental models. I liked the shopping analogy and the idea that the unique shopping experience in general merchandise stores may be accomplished in libraries by discovery services.

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Letters to the Editor

Send letters to <kstrauch@comcast.net>, phone or fax 843-723-3356, or snail mail: Against the Grain, Send letters to <kstrauch@comcast.net>, phone or fax 843-723-3536, or snail mail: Letters to the Editor

Against the Grain, Charleston, SC 29409. You can also send a letter to the editor from the ATG Homepage at <http://www.against-the-grain.com>.

Dear Editor:

I’ve become a great fan of the Charleston Conference because this conference often is uncomfortable for all the groups in the audience including librarians. For example, one speaker cautioned libraries that they might not get to keep the savings from the success of open access because these savings would be used to pay author fees.

I’ve come to dislike conferences where all the sessions tell the librarian audience how great

Peter Binfield. The Op-Ed is by John Dove and poses the question “if filter failure is the problem, then what is filter success?”

We are trying a little something new with our Luminaries column, this issue, p.38. Todd Carpenter, Jenica P. Rogers, Courtney Young, and Rachel Fleming (the editor of future luminaries columns) comment on something in our environments — this time it’s Twitter!

Time to go to try on dresses for the wedding. My daughter tells me I need 5 outfits! Is she getting married 5 times?

Oh well. Happy fall and see y’all in November.

Love, Yr. Ed.  

Against the Grain Full Page Deadline:  

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Electronic File Save and Submit on http://www.against-the-grain.com  

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or services in a relatively consistent position to some environment that will include search results, associated services, and perhaps to suggested resources or possible paths to more useful results.

The idea of a “search box” can be manifest in a number of similar ways: single box, tabbed search boxes for differing content or resource types, drop downs on the right or left with various choices or a self-completing / suggest type of search functionality (think Amazon, Google). The number of possible search box permutations is nearly endless but the idea of the search box as a consistent and known entry point to the library remains regardless of exactly how it’s implemented. The model would suggest that in an information space there is an expectation that there should be a central mechanism for searching for informational items. These items might be known or unknown but the model should suggest that they could be searched for with some array of specific helpful services arranged in near proximity. The discovery search box allows for a transformation similar to Amazon. The discovery service allows a transformation from just searching for a singular type of item (books) to a more encompassing search of all of the information items that the library holds (articles, audio, books, documents, reports, video, etc.).

So how do we get from where libraries are now (generally dissimilar in the virtual space) to a modestly similar virtual presence for the like kinds of services and resources that encompass a mental mode of “the library”? Let us return to the shopping metaphor.

If you need a common item of some type (say a hair brush) and any general manifestation of it will do (round, rectangular, color doesn’t matter, maybe a folding version, maybe not; any hair brush will do so long as I don’t look like slovenly when I’m done using it) then a general model of a general store probably fine — so much the better if it has a manageable range of options. However, if you’re a power shopper and/or you have extensive knowledge of your topic (say fountain pens), and you have a very well-formed sense of what you’re looking for (such as Pelikan brand, 1940s vintage, piston-filling mechanism, fine nib size, or a unique model design), then a boutique is more in order. One doesn’t really expect to find any, let alone a range of fountain pens in the modern “big box” general store, but you would expect to find them at the pen store.

This boutique experience has a major presumption: You know that pen stores exist. By contrast, how many of our students or users know that there is a specific resource(s) in a given discipline that isn’t their primary area of academic endeavor? If you know what you’re looking for, either you’re highly motivated or else a specific resource has been recommended in a way that resonates as being worth the effort to find it, engage with it, and overcome the fact there may be no payoff for that effort. If you’ve done all this then you are seriously invested in your quest. Translation: I have to find a pen store, I have to start expending effort learning about pens to get the maximum utility out of that store (and know that the elusive model I seek is asking an awful lot since it may not even be available), and I have to then learn the idiosyncrasies of “pen vocabulary” and realize that I may have nothing actionable to show for my effort. This is not to say that this effort isn’t worth undertaking, only that it’s not the kind of effort that everyone will undertake as a routine matter without some serious motivation or focus.

If the search box becomes the common entry point to the library and its collections, then perhaps the task of getting users to some more specific resource is a function of the general experience and should not require any a priori knowledge of the resources and services of a specific library. For some brief context, keep in mind libraries don’t even have a common naming convention in the virtual space; finding a library’s virtual presence is frequently mediated behind a Web search service. Something as simple as library-dot-hostname-dot-domain (i.e., http://library.institution.edu) isn’t universal by convention or practice within the library community to the probable detriment of our users.

What if the library model morphed from having to know about specific resources (akin to boutique shopping) to that are usually arranged by silo (subject guide, course guide, lists) to a more general single silo model? Would that new library experience that moves from general (I want to know about electric cars) to specific (I want to know about battery technology) make building a more robust and understandable mental model of how the library works easier for our respective audiences?

Caveat: I still think there is a place for the historical precision, purpose, and performance associated with traditional metrics be they in a research database or a query of registered owners of a faulty product. But again, the very precise search is typically the result of a very specific purpose that presumes a fair amount of prior knowledge of what information or resources exist to complete that task and some well-formed sense of what constitutes reasonable expectations for the results. I need a scholarly article vs. I need a scholarly article on fountain pen performance in near zero gravity using emerald colored ink. Any scholarly article will do for the former; there likely isn’t an article for the latter.

What would a library be like if we had a common mental model built on a widely accessible and similar experience? What does a common mental model of a library mean if the mechanics of using and accessing all (or nearly all) of a library’s collections and resources scaled from effective on the simple end to powerful precision on the advanced end? With means to seamlessly suggest or recommend specific items and resources that the library may or may not have? How is this model any different from the physical models of allowing self-service shopping for generalities vs. having a sales person direct you to products that are in the store or recommending another store where what you seek resides?

It is time to seriously think about and explore opportunities for simplifying the mental model of the virtual library. Perhaps this effort can begin by exposing and leveraging access to collections, resources, services, and recommendations after a user has passed through an understandable search box model of the library regardless of how they have reached the library.

Acknowledgments: Jesse Holden, University of Southern California, for clarifying all things fountain pen. Anna Marie Johnson, University of Louisville, for pithy grammatical and stylistic suggestions.

Endnotes


Speaking of statistics, it’s great having use statistics for some of the Charleston Conference Proceedings and Against the Grain! Check the articles out and see this issue, p.12. And visit the Purdue University Press Website for more info as well as ATG! docs.lib.purdue.edu/charleston/ www.against-the-grain.com/ 

Speaking of the online ATG — two articles will be online shortly that did not make it in the September print issue (space and all that). Read Dennis Brunning online at www.against-the-grain.com/ and a new columnist Jerry Spiller, Decoder Ring — Digital Comics: Ownership and Access. Jerry is talking all about graphic novels in academic library collections! And both articles have a lot of links so we thought we would mount them online. Tell us what you think! www.against-the-grain.com/ 

And, did I tell y’all that the Convocation book at the College this year is Fun Home! A graphic novel! We are even trialing Alexander continued on page 31
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

In just to prove I sometimes do social media. Doug is adjunct faculty at Texas State University but I remember him best when he was at ReferenceUSA. Hope to see him in Charleston soon!

We are having another Hyde Park Corner debate in Charleston this year at the end of the Charleston Conference. This one will be between the awe-inspiring Rick Anderson and the very scholarly Jean-Claude Guedon whose wife is also a librarian and will be attending the Conference as well. Stay tuned for another exciting discussion!
At ten a.m. (a little after, actually), the “Closed” sign was still evident, but I could see someone in the kitchen in the rear of the shop. A lanky, unkempt man was clearing his breakfast dishes but refused to look towards the door and make eye contact with me. He then disappeared and so did I, walking across Briggate to Waterside, retracing my path back to Rascals, a café situated between the River Nidd and (below) the Knaresborough Castle.

I had been deprived of another “browse” so I sat outside and treated myself to a rascal (fruit filled scone) and a very large coffee that came with a pot of heated milk. There is more to life besides books and it was hard to see someone in the kitchen in the rear of the shop. I enjoyed reading Dornford Yates ( Cecil William Mercer and cousin to H.H. Munro, aka, Saki) and own several of his Chandos novels, but I didn’t pay £60 for the lot of them. The Chandos novels are thrillers, much like John Buchan’s (1st Lord Tweedsmuir and former governor general of Canada) Richard Hannay tales (The Thirty-Nine Steps).

The young woman at the desk greeted me in a French accent and apologized for the empty shelves. She pointed to a number of large, aluminum packing cases and explained that most of the stock was in them and ready to be shipped to London for its antiquarian book fair. I accepted a business card, thanked her, and walked out without a purchase, breaking my own rule but rationalizing that had the shelves been fully stocked, I would have found something in my price range. I’ll be back one day to test my hypothesis.

Across the street was Fossgate Books, the most interesting of the three that day, but I could find nothing in my areas of collecting. Still, were I not having to worry about the weight of my luggage, had I been a local, I would have left the shop with an armful of good reading. It was a joy to see all of those Penguin paperbacks arrayed like a prism, if shelved together, reflecting Lane’s color scheme:
- Orange – Fiction
- Green – Crime novels
- Cerise – Travel and adventure
- Blue (dark) – Biography
- Red – Drama
- Purple – Essays
- Yellow – Miscellaneous (none of the above)

As it turned out, the only book I bought there, after much agonizing, was a copy of The Intelligent Heart: The Story of D. H. Lawrence by Harry T. Moore. It is a Penguin, printed in 1960, and it does not have a blue cover. The top three fourths of the cover is pink with both white and black letters and at the bottom is the Penguin on the left side (black background) and on the right side, “Penguin Biography” printed in white on a gray background. I was drawn to the Lawrence book not by the color scheme but by the subject, a recent interest because of what I was reading while in Lawrence’s native country: Love Among the Haystacks, The Ladybird, The Fox, The Captain’s Doll, and The Virgin and the Gipsy. I left those stories behind and am not starting to collect D.H. Lawrence, despite a growing interest in his writings but I did, just the other day, buy a copy of Lawrence’s Mornings in Mexico while fulfilling my bibliophilic honor at Browser’s Books in Albany, Oregon.

My story would not be complete without another visit to Hawes, lunch at the Wensleydale Creamery and then down the hill to the bookshop. It was market day in Hawes, the weather was beautiful, and I had plenty of time. The grouch at the desk had been replaced by a cheerful young woman ready to answer questions and be as helpful as possible. To reward the young lady and myself, too, I bought eight paperbacks (mostly Penguins) and a hardbound copy of Randall and the River of Time, by C.S. Forester.

I subtract the four bookshops that I visited from the 25 shops in Hay-on-Wye that I did not visit and come up with a deficit of 21. So should I arrive in Hay-on-Wye some sunny day in the future, and should I only make the rounds of 21 of the 25 shops, I will call it even. In fact, I will call it a bonus. But I won’t promise to buy a book in each of the shops. 😊
important digital assets.” Current services are the Merritt repository; EZID (easy-eye-dee), a service to create and manage persistent identifiers; DataUP, a tool to manage data in Excel spreadsheets; and the DMP (Data Management Plan) Tool to help researchers create and manage data management plans. Detailed information about these services can be found at http://www.cdlib.org/services/uc3.

The Merritt repository, named for Lake Merritt in downtown Oakland where the CDL has its offices, may be thought of as the UC institutional repository. It began as a service that provided permanent storage for digital objects. A front end is now available to allow viewing of publicly-available material including publications and electronic theses and dissertations (ETDs). Planning is currently underway for a new interface including the potential to expose content for search engine indexing.

In the beginning Merritt only accepted textual files; it can now accept audio and video files and, most recently, data sets with persistent URLs. In addition to Merritt, UC researchers also have access to data management services provided by the San Diego Supercomputer Center.

As was noted above, one of the principal drivers for library involvement with data curation is grantor insistence on the creation of data management plans for funded research. The National Science Foundation began requiring a formal data management plan as part of the proposal process in January 2011. Many other funding agencies have followed. Currently data management plans are also required by the National Institutes of Health, the Institute for Museum and Library Services, the National Endowment for the Humanities, and the National Oceanic and Atmospheric Administration, among others. The memorandum from the federal Office of Science and Technology Policy of February 22, 2013 entitled Increased Access to the Results of Federally Funded Scientific Research signals an increasing federal government interest in openness and access to federally funded research. Data management and preservation requirements are an integral part of this effort. To assist researchers in meeting these requirements, UC3 and external partners have created the DMP Tool. This tool helps users create ready-to-use data management plans for specific funding agencies, provides guidance on how to manage data, and provides information on resources available to help meet granting agency data management requirements. As of June 2013 the DMP Tool was being used by over 5,600 researchers at over 700 institutions.

Another service of the UC Curation Center is EZID (easy-eye-dee) which allows researchers to create persistent identifiers, including ARKs and Data Cite DOIs. These facilitate the citation of data sets in publications and the sharing of data sets among researchers. As of June 2013 the service was being used by forty-nine academic institutions and other organizations.

These three components: an institutional repository providing preservation and access, a tool to help researchers create data management plans and a tool for the creation of persistent identifiers for data sets are basic to any data curation service. In addition to these, UC3 also supports DataUP, a tool to facilitate the management and archiving of tabular data on spreadsheets such as Excel. This tool checks for possible formatting issues, creates metadata and describes the attributes of the data set in standardized format, obtains a unique identifier for the data set, generates a citation, and posts the data and metadata to a repository.

One of the clearest explanations of why libraries should embrace new roles in data curation is found in the ARL report New Roles for New Times: Digital Curation for Preservation by Tyler Walters and Katherine Skinner http://www.arl.org/storage/documents/publications/nrnt_digital_curation17mar11.pdf. “We suggest how research libraries need to be repositioned as vibrant knowledge branches that reach throughout their campuses to provide curatorial guidance and expertise for digital content, wherever it may be created or maintained. We argue that libraries can no longer expect that researchers and scholars will come to them for advice and assistance; libraries must instead find new ways to reach them wherever they may be. Research and learning activities are increasingly intra- and inter-institutional, collaborative, interdisciplinary, international, and virtual. We show how the library must adjust its service offerings to this new landscape in order to remain viable.” Increasingly, this vision is being adopted by all types and sizes of academic libraries, not just those considered traditional research libraries.

All academic libraries face budget and staffing constraints. In many cases, involvement in new work such as data curation will of necessity involve giving up some traditional work and repurposing existing staff. This can be difficult, maybe even painful, but it is necessary if academic libraries are to adapt to the new realities of faculty research support.

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And — also — did you notice that we are doing weekly Rumors online?  http://www.against-the-grain.com/category/atg-Rumors/

It has been raining non-stop in Charleston all summer and fall. Here’s hoping it’s finished in time for the Charleston Conference! Have you registered yet? www.katina.info/conference

Meanwhile — see y’all in November or online at www.against-the-grain.com/.

Love from Yr. Ed.