Introduction

This work was carried out as part of the Simplifying the Discovery Environment FY2013 Strategic Initiative. One of the tasks outlined in the strategic objective proposal was to conduct an environmental scan of library web site designs from peer institutions to identify existing models for electronic resource discovery. The goal of this exercise was to learn from peer institutions that have recently redesigned their discovery environment and/or implemented a vended discovery tool.

Methodology

- We selected nine peer library sites for review: Boston University; Columbia University; Cornell University; Dartmouth College; North Carolina State University; Stanford University; University of Chicago; University of Minnesota; and University of Virginia.
- Criteria for selection: Sites that have recently adopted a discovery tool and/or changed their homepage information architecture (IA) to present the existing and new discovery environment to users.
- Homepage IA for each was reviewed and diagrammed (see Appendix).
  - The team analyzed each web site through group exercises both by looking at the sites in real-time and analyzing IA diagrams that were mapped out on paper.
  - The IA diagrams served the purpose of stripping away web page design elements so that the team could focus solely on discovery terminology and groupings.
  - The IA diagrams also allowed us to narrow our focus by determining which peer web sites had discovery elements that would be valuable to emulate.
- Four sites selected for closer analysis: Cornell; NCSU; Stanford; and U of Chicago.
  - All four sites had elements that we would like to emulate for our discovery environment.
  - We conducted additional team exercises to analyze these sites further, looking closely at all of the elements in their discovery environments.
  - We compiled notes on discovery environment pros and cons that we observed on these sites, which helped inform our recommendations below.
Findings

- We engaged in the environmental scan assuming we would find clusters or emergent models of how library resource discovery is scoped and presented to users. While we did observe several groupings of discovery models, none seemed dominant in its approach.
- We observed two general trends in presenting search options on the library homepage: a single search box or a tabbed-search environment. However, even when different libraries used the same model, search functionality and presentation of search results often varied greatly.
- Several (but not all) of the peer library sites integrated a vended web-scale discovery service (e.g., Summon, EDS, Primo Central) as part of their overall library discovery environment, but the implementation of the discovery service tool varied across the sites.
- Most of the sites that implemented a discovery service branded the tool as an articles/e-books search tool (see Cornell, NCSU, Dartmouth, Columbia, Virginia); only BU presented the discovery service as the primary search tool for searching all library collections.
- With the exception of BU, the sites that did offer a “Search All” option on their homepage, typically pointed users to a homegrown “composite library search” application that unified search results from multiple sources in a tabular user interface (see Stanford, NCSU, Dartmouth, Columbia, Virginia); with the exception of Stanford, these sites utilized the discovery service as a data source (via API) to populate an articles/e-books section of the composite library search results.
- In the cases where the discovery service was embedded as an articles/e-books component in the composite library search results, the user was presented with an option to “see all” results in the hosted discovery service application.

Recommendations

General

1. Use a blend of EBSCO Discovery Service (EDS) and our other existing discovery tools for our discovery environment.
2. Ensure that the discovery environment uses a consistent, controlled language (always call a tool, etc. the same thing).
3. Use descriptive language, rather than tool or product names, to label discovery searches — e.g., use “Books & Media” instead of “Catalog” or “Barton.”
4. Embed specific search examples within discovery search environment, e.g., “example search: concrete cracking.” Craft examples that show the breadth of what can be searched.
5. Explore feasibility of using “no results” pages to promote other search options, perhaps even pre-running the searches. For example, provide a “Looking for articles?” search on the OPAC “no results” screen with a link to EDS (perhaps showing a few results from EDS).
6. Make it easy for users to understand how to expand their search from just the local catalog to the consortial catalog.
7. Explore the possibility of using scoped EDS searches, e.g., create a unified e-books search combining Aleph and EDS records.

Homepage

3. Explore desirability of adding a “Quicklinks” section to the homepage, like U. of Chicago has, which leads to most-used databases.
4. Do not mix discovery search tabs with other potential homepage sections, like “Quicklinks” or “search library website.”
5. Promote EDS as the primary place to start searching, while still being clear there are other search options that would be better for certain types of searches.
6. Investigate feasibility of providing an Images search tab.
7. Continue to use contextual description within search box, e.g., “Find books, DVDs, theses…”
8. Emulate NCSU model of consistency when using radio buttons vs. drop-down menus on the homepage tabs; i.e., radio buttons determine what tool you are searching and the drop-down menus determine what you are searching within that tool.

Future

We like the model of presenting an “all” search that leads to a composite search results page (see NCSU and Stanford), but this is not technically feasible for MIT in FY13. We recommend that this option be explored post-FY13.

Appendix

Screenshots and IA diagrams of all 9 sites reviewed