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Discovery Layers vs. the Traditional Catalog: e-Forum Summary

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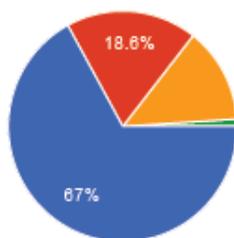
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Discovery Layers vs. the Traditional Catalog: e-Forum Summary

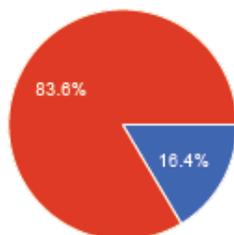
This ALCTS E-Forum provided an opportunity for technical services librarians to discuss the challenges and opportunities of running a discovery layer from a technical services perspective. The discussion kicked off with a brief survey of the number of libraries using a discovery layer and an introduction by participants of the discovery layers in use. Although not explicitly defined during the e-forum, by discovery layer, the moderators were referring to the variety of tools available to libraries that bring together article-level content, specialized databases, and the content traditionally found inside a library catalog (e.g., books and journal titles) into a single searchable index. Based on the survey, 67% of e-forum participants are using a discovery layer and 83% maintain this layer alongside the traditional catalog. During the e-forum participants identified a number of commercial systems in use at their libraries (Summon, Encore, EDS, WorldCat Discovery, Primo), as well as some customized or open-source products. Participants at some specialized and public libraries expressed opinions that discovery layers do not fit their institutional needs, either because of the lack of sophisticated searching or specialized content, or because of overemphasis on article content. Public library participants did see value in using them to promote under-utilized databases and to assist staff in searching. Most participants also indicated that their libraries keep a more traditional catalog interface available for use, even with the concern that “nobody knows what a catalog is.”

Does your library currently have a Discovery Layer?



Yes	65	67%
No, but we are considering one	18	18.6%
No, and we are not considering one at this time	13	13.4%
Not sure	1	1%

Are you using your Discovery Layer as your catalog, or in addition to it?



Discovery is our catalog	12	16.4%
We use both a DL and a traditional catalog	61	83.6%

In academic libraries, discovery layers tend to be the preferred tool for undergraduates, while more advanced scholars (and some library staff) prefer the traditional library catalog for known items, additional search features, and more specialized content. Discussion about the different levels of user sophistication and varying research needs continued through the entire e-forum. One participant put the difference between searching in terms of recall versus precision. Discovery makes an ideal tool for quickly returning at least some relevant results—great for basic research—but often brings back a large number of irrelevant results in a huge set. A traditional catalog or subject database, with better indexing and search options, provides higher precision, but may be more complicated to use. Another participant suggested this could be a natural progression in researcher needs: the ability to start with a broad, inclusive, but unrefined tool, and then move to a more sophisticated, limited, or subject-specific tool. As one participant said, “discovery layers make it easy to cast a very wide net, but difficult to cast a more narrow one.”

A great deal of discussion centered on analytics and how discovery has impacted the use of library resources. While usage overall seems to have gone up, some resources are now getting lower use which is largely attributed to vendor metadata agreements and difficulties with relevancy ranking. Promotion and marketing of discovery interfaces also plays a role, as does bibliographic instruction. So far no one seems to be only teaching users to search in discovery, it’s still one of many tools librarians offer to their students. Interestingly, the way users searched also varied widely among participants who were monitoring search habits. Most users seem to prefer basic over advanced searching in either their catalogs or discovery. This may change as discovery continues to evolve. And there is always room for improvement: a couple of participants are calling on vendors to use approved standards like KBART, and improve KBART matching against OCLC records.

From a technical services perspective, discovery layers have led to changes in technical services operations. In order to avoid maintaining large sets of temporary or subscription records, some libraries are choosing not to catalog abstracting and indexing databases, aggregated sets of large serials packages, or leased collections. On the other hand, many respondents still load records into the catalog to address gaps in discovery layer coverage, poor quality of vendor-supplied metadata, or vendors that don’t “play nicely” with each other. Unfortunately, withholding content from competitors’ discovery layers can be seen by some vendors as a competitive advantage for their own product, leading to more work or less access to content for library users. Other cataloging changes included a discussion of RDA and GMDs, and whether facets are sufficient for users to find the formats they need.

Purchasing decisions are also being affected. If a resource is not integrated into the library’s discovery system, selectors may delay or refuse to make the purchase, or choose to buy from one vendor over another rather than create a work-around through the catalog. This is particularly true at smaller institutions that don’t feel the need to maintain large numbers of databases outside of their discovery layer. Because of the different levels of integration by different vendors, link resolvers remain an important tool for connecting citations from the discovery layer to content accessible by library users. Troubleshooting is an additional responsibility for technical services staff to identify where links in the system break down, and users are not able to get to the content they want. With many different links in the system exchanging data, it can be difficult to pinpoint where things break down. A number of participants mentioned using a team-based approach to managing their discovery layer and other discovery tools, with technical services staff members playing a key role in that work.

Discovery systems are not one size fits all. Special collections librarians and consortial members shared some concerns about the way discovery systems display information. One example given was “phantom holdings” created by electronic resources indexed in databases such as HathiTrust : these digitized items may be conflated with print holdings on the same record in Worldcat. For consortia or shared print repositories, “magically multiplied holdings” (clustered records) make it appear that one single item is held by multiple libraries. One library is asking OCLC for ways to “decluster” records in order to be able to find specific formats or editions as these special characteristics can get lost in the results. While this “FRBRization” of records can be frustrating in such circumstances, librarians involved in preservation acknowledge that a wise preservation decision has to take into account the sort of multi-format context a discovery layer offers.

Despite the extra work, most participants seemed enthusiastic about the ways technical services staff have stepped up with regards to improving access to information and applying their expertise in cataloging and metadata. One librarian commented, “It’s all about the metadata and online resources, with a user experience component on top.”

For additional information about the topics discussed during this forum, participants shared the following resources:

Janyk, R. (2014). Augmenting discovery data and analytics to enhance library services. *Insights: the UKSG journal*. 27(3). Retrieved from <http://insights.uksg.org/articles/10.1629/2048-7754.166/>

Kornegay, R. (2013). The Subject Heading Browse Display: Another Essential Component of Information Discovery. *Against the Grain*, 25(2).

Gilmore, T., & Thorpe, A. (2015, February). Discovery, Analysis, and Shaping the User Experience. Presented at the ER&L Conference, Austin, TX. <http://bit.ly/1QhHgrQ>