3-20-2008

Electronic Resources in a Next Generation Catalog

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University of Iowa
ELECTRONIC RESOURCES IN A NEXT GENERATION CATALOG

Wendy Robertson
The University of Iowa Libraries
Electronic Resources & Libraries, 2008
OVERVIEW

- Next generation catalogs and Primo
- Old “Smart Search” at The University of Iowa
- Implementation issues
- New “Smart Search”
- Features and Examples
- Problems
- Moving where users are
- Future plans
WHAT TYPES OF ELECTRONIC RESOURCES?

- Licensed/purchased full content (journals, books, audio, maps etc.)
- Licensed/purchased databases
- Local digital content (images, audio, video etc.)
- Local full text
- Local websites (including finding aids)
WHAT IS A NEXT GENERATION CATALOG?

“It’s designed less like a “catalog”—an inventory list—and more like a finding aid. It contains data as well as metadata, and it is bent on doing things with found items beyond listing and providing access to them.” – LITA blog, July 7, 2006

Examples:

- NCSU’s Endeca® implementation
- Open WorldCat® –OCLC
- Primo® –Ex Libris
- Aquabrowser Library® –Bowker (e.g. University of Chicago)
- Encore–Innovative Interfaces (e.g. Michigan State)
SELECTED FEATURES OF A NEXT GENERATION CATALOG

- Faceted navigation
- Federated searching
- Full text searching
- Interaction with other systems/use of API’s
- Multiple works merged (FRBR)
- Notification of new items by topic etc.
- Personalization, tagging
- Reader’s advisory/recommendations
- Relevancy ranking
- Reviews
- Search terms highlighted
- Spell checking, did you mean...?
WHAT WE ARE AIMING FOR

- Simple to use, single search box for all our content
- With high quality content and good metadata
PRIMO

- The University of Iowa’s choice for a next generation catalog
- Finding and discovery tool
- Not meant for the advanced researcher
- Work in progress ("Everything is Beta")
- Does not yet have all possible features of a next generation catalog
“SMART SEARCH” BEFORE

Locally created search of
  • Library Catalog – keyword search
  • E-journal A-Z list
  • Local database of databases, websites, and book and journal collections (previously called the “Gateway”)
  • Libraries website

Results from 4 sources not merged
Did not include digital collections
E-resources displayed in upper left (always at top, searching in collection of <2000 items)

Top 5 results display for each source
Click “more” for additional resources
E-resources displayed in alphabetical order

No separate interface
E-journals displayed in alphabetical order

Separate interface available
A-Z list from SFX
This interface still exists
Website results displayed in limited relevancy order

Originally no separate interface
Catalog results displayed in reverse system number order

Separate interface available
Traditional ILS
This interface still exists

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<th>Display Availability</th>
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<td>Location</td>
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<tr>
<td>Title</td>
<td>Time line of early civilizations [chart].</td>
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<tr>
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<td>Holt, Rinehart and Winston, Publishers, n.d.</td>
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<td>Author</td>
<td>Bell, Dean Phillip, 1967-</td>
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<tr>
<td>Title</td>
<td>Jews in the early modern world /</td>
<td></td>
</tr>
<tr>
<td>Format</td>
<td>Book</td>
<td></td>
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<td>Title</td>
<td>Population movements, conflicts, and displacements in Nigeria /</td>
<td></td>
</tr>
<tr>
<td>Published</td>
<td>Trenton NJ : Africa World Press, c2008.</td>
<td></td>
</tr>
<tr>
<td>Format</td>
<td>Book</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Main Library HB2126.7.A3 P67 2008</td>
<td></td>
</tr>
<tr>
<td>Availability</td>
<td>Check shelf or Request delivery</td>
<td></td>
</tr>
</tbody>
</table>

Sorted by date, author, title
Digital Content Management System (ContentDM)
This interface still exists

No cross searching of with other resources
PRIMO TIMELINE

- Worked on implementation summer 2007
- Focused on
  - Indexing, display, faceting
  - How to load data
  - Basic functionality
  - Appearance, branding
- Local soft release in late September
  http://smartsearch.uiowa.edu
- Full release in mid-January
- Two updates implemented since then
- V.2 will come out this spring
GETTING INFORMATION INTO PRIMO: CATALOG

- Not a live connection—records need to be loaded
- Loaders exists for MARC
- Aleph catalog – loaded in multiple times a day
  - New and updated records loaded
  - Records with changes to circulation information loaded
GETTING INFORMATION INTO PRIMO: A-Z LIST

- Changed procedures to use MARCit records for packages, consortial agreements and free titles
  - Primo gives us the single record display we had been wanting
  - Change in ARL stats gave us more flexibility
- Loaded missing titles into Aleph
GETTING INFORMATION INTO PRIMO: E-RESOURCES DATABASE

- Added field for Aleph ID
- Loaded basic records into Aleph
  - Database had only brief information
  - Standardized publisher information
- Added 930 fields to existing records (controlled vocabulary and misc terms)

<table>
<thead>
<tr>
<th>Leader</th>
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<tr>
<td>Owner</td>
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<td>005</td>
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<tr>
<td>Fixed Data</td>
<td>008</td>
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<td>Summary Note</td>
<td>620</td>
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<td>Gateway Info</td>
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<td>Gateway Info</td>
<td>930</td>
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<td>Gateway Info</td>
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<tr>
<td>Title info</td>
<td>845</td>
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<tr>
<td></td>
<td></td>
</tr>
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</table>
GETTING INFORMATION INTO PRIMO:
CONTENTDM

- Loader exists for Dublin Core
- We use LC Authorities when possible in CDM
  - DC lacks structure of MARC so some manipulation of names not possible for complex names
- Assess how subjects and types can best work with facets
- Results varied depending on CDM collection settings (standardizing)
- Some data inconsistencies in CDM (standardizing)
EXAMPLE DATA FROM CDM


xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/oai_dc/ http://www.openarchives.org/OAI/2.0/oai_dc.xsd">  
  <dc:title>Eminent domain</dc:title>  
  <dc:creator>O'Brien, Dan, 1947</dc:creator>  
  <dc:publisher>University of Iowa Press</dc:publisher>  
  <dc:date>1987</dc:date>  
  <dc:language>English</dc:language>  
  <dc:description>`Eminent Domain' bears the hallmark of a mature and talented author. While subtle metaphors and analogies resonate throughout the text, the surface of these stories is charged with vivid scenes of fishing, caring for game birds in winter, branding calves in Nebraska, and rescuing a wounded mountain climber. With both humor and poignancy, Dan O'Brien explores the lives of his diverse characters. In 'The Inheritance,' a businessman goes fishing after the death of his father and realizes, through memories he tries to evade, the richness of the inheritance his father has left him. 'Eminent Domain' tells the story of Willy Herbeck, who's 'dirty, sloppy, unsociable, old-fashioned, moody, bullheaded, and ugly.' But he's also 'got class' and is willing to go to extremes to keep from selling his junkyard to the government. At ease with a wide variety of characters and complex emotional circumstances, O'Brien enriches his stories with authentic voices and thought-provoking resolutions. These are stories you will return to again and again'.--Front flap</dc:description>  
  <dc:relation>Winter cat -- Cowboy on the Concord Bridge -- Seals -- Eminent domain -- The inheritance -- Weightless -- The wild geese -- Strand of wire -- Final touches -- The Georgia breeze</dc:relation>  
  <dc:description />  
  <dc:subject />  
  <dc:subject />  
  <dc:contributor>Morris, Mary, 1947</dc:contributor>  
  <dc:relation>University of Iowa Press collection</dc:relation>  
  <dc:relation>Iowa short fiction award</dc:relation>  
  <dc:date>1986</dc:date>  
  <dc:publisher>University of Iowa Press</dc:publisher>  
  <dc:identifier>0877451702</dc:identifier>  
  <dc:format>135 p. ; 23 cm</dc:format>  
  <dc:format>image/jpeg</dc:format>  
  <dc:format />  
  <dc:date>2006-09-19</dc:date>  
  <dc:rights>Copyright 1987 by Dan O'Brien. No part of this book may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying or recording, without permission in writing from the publisher.</dc:rights>  
  <dc:identifier />  
  <dc:type>Text; Still image; Books; Short stories; American fiction</dc:type>  
  <dc:relation />  
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  <dc:identifier>170925006</dc:identifier>  
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NEW SMART SEARCH

- Electronic resources database and digital resources completely integrated with traditional catalog resources
- Federated search is separate option
  - Could be merged with local resources
  - Non-local database searching slower
  - Ex Libris working with vendors to improve response time
- At this time the Libraries website is not included
Digital object from CDM
Collection level record for digital collection from catalog
Traditional MARC records from ILS
Federated search option

Large results can be managed with faceting
These come from the electronic resources database.

Single record

Merged display of print and online records

These come from the electronic resources database.
Digital objects usually are under resource type images or text resources etc., but in this case they are 3-D objects.
INCLUSION OF LIBRARIES WEBSITE

- Goal was to have libraries website included at full release
- Public service said not critical
- Still very important for Special Collections finding aids
- Separate search available
WEBSITE

Current status:
- Successfully crawled www.lib.uiowa.edu (omitting pages that don't make sense).
- Modified an open source Perl product Swish-E Spider: http://swish-e.org/docs/spider.html
- Hopefully live before the end of the semester

Our biggest challenges:
- Crawling logic—Making sure we don't inadvertently access URLs that time out
- Character encoding as related to HTML and XML entities—we've had to tweak standard Perl packages
MERGING RECORDS IN PRIMO

- Two separate functions—De-duplication and FRBRization
- Rules assess similarity between records. Those that meet a threshold for similarity will be merged.
  - Dedup records are completely merged; individual records cannot be viewed in Primo but do have a link to Aleph catalog
  - FRBR records are merged for display, but also allow viewing of individual titles
EXAMPLE OF SINGLE RECORD DISPLAY

Single record. Online access shows on brief results.

Single link to Aleph catalog.
EXAMPLE OF DEDUP PRINT + ONLINE

Online record takes priority for display

Single record. Online access shows on brief results.

Two links to Aleph catalog.
EXAMPLE OF FRBR ONLINE + PRINT

Online record takes priority for display

FRBR link

Print record.
Published Washington DC, 1990-

Online record.
Published Washington DC, 1995-
NAME DISPLAY FROM CDM

ILS names not inverted

CDM names inverted. I could not get them to display properly unless inverted
ILS & CDM NON-MERGER

Working on this

Few collections have individual object both in catalog and in CDM
EXAMPLE: M.F.A. THESIS AND M.F.A ART

- Print thesis and image of thesis both in Smart Search
- Imperfect because different sources for name
  - LC NAF vs. ULAN (Union List of Artist Names)
  - No authority record in this case

What artist calls self

Official registered name on thesis
KNOWN JOURNAL SEARCH – BEFORE
KNOWN JOURNAL SEARCH – AFTER

Smart Search

Search for

journal of biological chemistry

Go

Hello, Guest
Sign in to have full access and to keep things. Why sign in?

To enter my workspace

results for All Local Resources

- Electronic Journals — Looking for online Journals?
- Chemistry Library — Looking for the Chemistry Library?
- Biological Sciences — Looking for Resources by Subject: Biological Sciences?

63 results, sorted by relevance

1. The Journal of Biological Chemistry.
American Society of Biological Chemists; Rockefeller Institute for Medical Research; American Society for Biochemistry and Molecular Biology; American Society for Biochemistry and Molecular Biology (etc.) 1905

Add to e-Shelf
Online access (Get)

Society of Biological Inorganic Chemistry, Springer (etc.)

Refine My Results

Narrow my results by limiting the search to:
Top Level:
- online resources (21)
- available (0)

Resource Type:
- Journals (60)
- Other (1)
- Books (1)
- journals_all_text (1)
KNOWN JOURNAL SEARCH – AFTER
KNOWN E-RESOURCE SEARCH – BEFORE

Search for OED brings Oxford English Dictionary to top
Search for OED brings Oxford English Dictionary to top.

Icons previously labeled which confused library staff.
KNOWN DATABASE SEARCH – BEFORE

All the Ebsco databases

Most popular happen to appear

Can easily get to rest
KNOWN DATABASE SEARCH – AFTER

Resource type based on cataloging

Integrating resource still in BK format with 006s

May be lacking 008/21 d

CHANGE: Databases now a resource type

Computer file with 008/26 d or e
DID YOU MEAN....?
LOCAL ADDITIONS TO DID YOU MEAN....?

Selected words added at request of staff

Ulrichsweb is #8 in list
FACETING

- Not magic—there has to be data in the records (i.e. good cataloging)
- We added terms based on codes in fixed fields (e.g. Newspaper, CD etc.)

Searched for Mozart:
Unsure why CDM is not clustering with MARC

CDM includes dates but all in one field. Subfield d not included from ILS (local choice)
Call number faceting for unclassified and electronic journals

Search originally had 152,637 results

Faceted down to RC554-569

Search originally had 152,637 results
Faceting for general topic
1. George W. Lewis grocery store, Iowa City, Iowa, between 1862 and 1873
   Wetherby, Isaac Augustus, 1819-1904
   University of Iowa. Libraries. University Archives 186-
   
   Add to e-Shelf Online access (GetIt)

2. Iowa Avenue houses, Iowa City, Iowa, ca. 1900
   Kent, Frederick W. (Frederick Wallace), 1894-1984
   University of Iowa. Libraries. University Archives 1900
   
   Add to e-Shelf Online access (GetIt)

3. War prices!
   Darling, Jay N. (Jay Norwood), 1876-1962
   State Historical Society of Iowa; University of Iowa. Libraries. Special Collections Dept.; J.N. "Ding" Darling Foundation 1904-02-19
   
   Add to e-Shelf Online access (GetIt)

4. St. George and the dragon up to date. The man with his own cow and garden is the only real hero of the present situation.
   Darling, Jay N. (Jay Norwood), 1876-1962
   University of Iowa Libraries. Special Collections Dept.; J.N. "Ding" Darling Foundation 1910-07-14
   
   Add to e-Shelf Online access (GetIt)
George W. Lewis grocery store, Iowa City, Iowa, between 1862 and 1873

Author: Wetherby, Isaac Augustus, 1819-1904

Subjects: Grocery stores; Storefronts; Geo. W. Lewis Store (Iowa City, Iowa); United States -- Iowa -- Iowa City; 1860-1870; 1870-1880; Town

Description: Grocery store located at 108 South Clinton Street. Photographer Wetherby's studio was above the Lewis brothers store. In later years, this was the site of the Big Store.

Related Titles: Iowa City Town and Campus Scenes Digital Collection; Frederick W. Kent Collection of Photographs, 1866-2000; http://www.lib.uiowa.edu/spec-coll/archives/guides/RG30.01.01.htm

Publisher: University of Iowa. Libraries. University Archives

Creation Date: 186-

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Link to Resource

Add to e-Shelf

Online access (GetIt)
George W. Lewis grocery store, Iowa City, Iowa, between 1862 and 1873

Title: George W. Lewis grocery store, Iowa City, Iowa, between 1862 and 1873
Creator: Wetherby, Isaac Augustus, 1819-1904
Date Original: 1862
Description: Grocery store located at 108 South Clinton Street. Photographer Wetherby's studio was above the Lewis brothers store. In later years, this was the site of the Big Store.
Topical Subject (LCTGM): Grocery stores, Storefronts
LINKS TO OTHER RESOURCES

Details

Traveling culture circuit Chautauqua in the twentieth century : from the University of Iowa Libraries.

Author: University of Iowa Libraries · Library of Congress · National Digital Library Program.

Subjects: Chautauqua — United States — History; Lyceums — United States — History.

Description: What was Chautauqua? — About the collection — Finding aid for entire collection.

Collection of publicity brochures, promotional advertisements, and talent circulars for performers who were part of the Chautauqua circuit. Derived from the Redpath Lyceum Collection at the University of Iowa Libraries. Materials include entertainers, lecturers, and performing groups such as teachers, preachers, statesmen, politicians, actors, singers, opera stars, glee clubs, concert companies, magicians, and whistlers.

Publisher: Library of Congress

Creation Date: 2001

Language: English

This Item in the Library Catalog

Online Access

View in WorldCat

Add to e-Shelf

Availability and location:

May be available: Electronic Resource

Links made by an API

A little bit circular
SEARCH BOXES WHERE USERS ARE

Dummy course page. Library widget now a default for all courses.
iGoogle page
IE search option
No Smart Search box....yet
It is just being made right now and should be there after the conference
PROBLEMS

- Online resource link is not being seen
- Databases have been difficult to find because of labels
- Known item searching can be more difficult (especially for major works of literature)
- Librarians concerned it “dumbs down searching”
  - HOWEVER: Users seem to like it
  - Concern that faculty (as expert searchers and older than average students) may not adapt as well as students
FUTURE PLANS

- Inclusion of Libraries’ website
- Talking to LibGuides about including content
- Google™ book search and CIC’s Shared Digital Repository (metadata and full text)
- Full text from local e-journals
- Investigating getting tags from LibraryThing
- Will include data from institutional repository
CONCLUSION

- Need to be flexible
  - Willing to change searching method
  - Able to adjust to constant beta
  - Able to keep up with user’s needs & request
  - Able to incorporate new technology
- Tool that works for many people much of the time, but not for all people all of the time
- ILS not going away
- Electronic resources are especially important for access and have some unique problems
THANKS!

Contact:
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Electronic Resources Systems Librarian
Digital Library Services
The University of Iowa Libraries
wendy-robertson@uiowa.edu