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Plan, Practice, Participate: Tips for Libraries Considering Implementation of EBSCO Discovery Service

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Abstract

During the 2013 Fall Semester, Charleston School of Law's Sol Blatt Jr. Law Library purchased EBSCO Discovery Service (EDS) to replace the clunky, antiquated federated search system we had used for years. We chose EBSCO Discovery Service because we like the single, unified searching of our databases and catalog, along with the ability to customize our EDS page. While the setup and rollout of EDS has taken some time, we are very excited to now have it complete for our patrons. For libraries considering implementing EDS, this paper offers tips to help the process go as smoothly as possible.

Keywords

EBSCO Discovery Service, discovery service, implementation



FEATURED ARTICLE

Plan, Practice, Participate: Tips for Libraries Considering Implementation of EBSCO Discovery Service

By Alison K. Jones

During the 2013 Fall Semester, the Sol Blatt Jr. Law Library purchased EBSCO Discovery Service (EDS). Prior to this time, we provided access to a federated search system which initially met the research needs of our patrons. But as our collection grew, it became apparent we needed a better tool to streamline access to information available through our online databases and OPAC. We chose EBSCO Discovery Service because it provides full-text access to many of our databases, is customizable, and easy to maintain. Implementation, however, is fairly complex, certainly more detailed than setting up a federated search system. Therefore, the following tips are offered to libraries considering purchasing EBSCO Discovery Service with the intention to provide insight about what to expect during implementation, and hopefully, to ensure the process goes as smoothly as possible.

Tip 1: Implementation is a team effort

Although a Discovery Services Coordinator (DSC) is assigned by EBSCO to assist your library with implementation of EDS, your library staff will need to select several members to participate in the process as well. A well-rounded team should consist of a person who is familiar with your library's bibliographic records and ILS (this may be the same person), one who is interested in aesthetics and branding, and member of the IT staff, as coding for the search box will be necessary when the custom catalog is built.

Tip 2: Create an action plan and adhere to deadlines

In order to create the custom catalog, three questionnaires are completed by the library team: a catalog questionnaire, a branding questionnaire, and a configuration questionnaire. Set strict deadlines for submitting these questionnaires. Some of the questions posed are very detailed, but it is perfectly reasonable to aim to complete all three questionnaires at the same time. Assign one person from your team to submit the final questionnaires and to be the main contact should EBSCO need further explanation to any answers your team provides. Also, keep in mind that your MARC records need to be exported from your ILS and loaded to an FTP site for EBSCO to import into the custom catalog. While it is not a complicated process, failure to properly export your records can halt production of the custom catalog.

Tip 3: Learn as much as you can about how EDS works

Once the questionnaires are submitted and the MARC records are exported, the custom catalog takes several weeks to complete. During this time, your team may want to read articles about discovery tools, particularly EDS, learn more about how link resolvers work, and brush up on terminology that may or may not be familiar. For example, the members of our team were aware of the term widget, but honestly, never thought that we may need to decide whether one should be created for a particular resource, and if so, where it will be most accessible to our patrons without causing unnecessary clutter to our results page. Furthermore, if possible, meet with other

librarians who have implemented EDS. Inquire about their customization preferences, workflow for updating EDS, and how they have promoted it on their campuses.

Tip 4: Do not immediately make EDS available to your patrons

When implementation of the custom catalog is complete, the DSC will send your staff a link to your catalog to test and further customize as needed. Our staff spent several months testing and customizing EDS with the staff link before we rolled it out to our patrons. This allowed us plenty of time to work out most of the kinks that inevitably comes with any new product and to build a search box most suited to our library's homepage. When you are ready to make EDS available to your patrons, you may need to contact the DSC for the link your IT department will need to build the EDS search box as it is different from the link used for testing.

Tip 5: Don't panic when the DSC sends you an email with the subject line "Discovery Solutions Product Completed" (or something similar)

There will come a day when the DSC determines that customization of your EDS is complete. You may feel anxious realizing that the DSC you have worked with so closely will no longer be the first person to contact at EBSCO regarding your EDS. But rest assured, the EBSCO Help Desk is a great resource. Since the completion of our catalog, we have contacted the EBSCO Help Desk several times, and without fail, the EBSCO staff has been knowledgeable, thorough, and courteous. They are easy to reach either by phone or email and will remain in contact with you as long as your case is open.

Tip 6: Practice, practice, practice

A discovery tool, such as EBSCO Discovery Service, can positively impact the way users search for and gather information. The versatility of searching EDS, for instance,

allows users to find resources that simply cannot be retrieved within a classic OPAC or federated search system. Using a discovery tool for research is in a sense liberating because it allows users to search as broadly or as narrowly as they prefer while instantaneously accessing full-text articles on a particular topic across myriad databases. However, because so much information is culled from a wide range of resources, many records retrieved will not have accompanying full-text articles. Thus, successful use requires practice, particularly among the library staff, so they can in turn teach students how to effectively search for resources and interpret the metadata produced to retrieve the most relevant results.

Tip 7: Participate in EBSCO Discovery Service webinars

What follows is more of an interjection than a tip to inform you that EBSCO offers many webinars throughout the year. Most consist of a member of the EBSCO team spending an hour focusing on a specific topic pertaining to an EBSCO feature. For example, demonstrating how to use EBSCO Admin to collect statistics, or showing new modules added to the EDS. Not only are the webinars free, but they are in real time and are interactive. Participants are encouraged to ask questions during the presentation, and the host provides his or her contact information for any follow-up questions that may arise at a later time. Personally, I have found the webinars well organized and insightful, and I feel participating in them helps to build a network between our library and members of the EBSCO team.

Final Thoughts

Even though we continue to customize our EDS catalog and work to improve how it functions, we are, overall, very happy with its dynamic performance and ability to filter results in a variety of ways. Certainly, EBSCO Discovery Service is not the only discovery tool available so careful evaluation of several products may be necessary to determine which one will best

fit the needs of your patrons. Regardless of the one you choose, implementation will likely be a lengthy and detailed process. Which brings to mind one last tip: have patience, not only with the suppliers of your discovery service, but with your library staff as they work to build, maintain, and learn how to use the new tool, and with your patrons as well, for they will have plenty of questions about how to search and filter to generate the most relevant results to their research.

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