Final Report on WorldCat Local

by the

HS/HSL WCL workgroup

The HS/HSL WCL workgroup began work in April 2009 on the online configuration of the HS/HSL instance of WCL using as a starting point the default branding and configuration provided via USMAI.

This group has dedicated many hours to try to make this product better, but concludes that, despite our efforts, WCL does not meet the needs of our users, nor the standards that the Health Sciences and Human Services Library expects of a discovery tool.

During this past year, members of this team have performed the following tasks:

- Customized branding
- Applied other self-configuration
- Adapted our ALEPH item records for journals
- Communicated frequently with OCLC-WCL support personnel for fixes
- Implemented WCL enhancements
- Added available databases to the Metasearch on our WCL test site
- Recommended enhancements to WCL-OCLC that have been adopted for all of WCL
- Met on two occasions with HS/HSL Library Staff to present WCL, do trial searches and receive feedback
- Expanded our WCL workgroup to include the Serials Cataloger and the Head of the Reference Department, besides the Digital Resources Librarian, the Cataloging Librarian and the Web Services Librarian, who already composed the group.
- Conducted a survey among HS/HSL staff

For survey purposes, a mock-up page with access to the HS/HSL behind the scenes instance of WCL, together with access to the survey, was provided. Participation of members of HS/HSL Library Staff was voluntary. The survey was conducted from February 24 to March 5, 2010.

The survey was composed of three major parts. In Part 1, participants were asked to rate WCL on features considered essential for a discovery tool by the HS/HSL WCL workgroup. In Part 2, the participants were asked if it was useful to have books, journals, and journal articles retrieved together in a single search, and to explain the answer given. In part 3, the participants answered yes or no to the question: Do you think that WorldCat Local is a useful tool? Explain.

The results of the survey show that, although there seems to be some interest in a tool that allows books, journals, and journal articles to be retrieved together in a single search, and WCL is perceived as possibly useful to our users in those terms, this specific product performs only average or lower in features identified as essential in HS/HSL's requirements for a discovery tool.

Conclusion:

The HS/HSL WCL workgroup concludes that WorldCat Local does not perform according to the expectations for a seamless, efficient, discovery tool that will generate relevant results from professionally sound sources in a timely manner. However, the work group does see the value of pursuing evaluation of other discovery tools that may be of better service to HS/HSL users.

The HS/HSL WCL workgroup

April 1, 2010

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Appendices -

Results of the Survey, conducted from February 24 to March 5, 2010

Some other findings and considerations

Results of the survey, conducted from February 24 to March 5, 2010, among HS/HSL Library Staff

Part 1: **How would you rate the following WorldCat Local features?**

- *Relevancy of results obtained*
  Average -   9   75%
  Below average -   3   25%

- *User interface*
  Above average –   4   33%
  Average –   6   50%
  Below average –   2   17%

- *Ease of access to full text*
  Above average –   2   17%
  Average –   5   42%
  Below average –   4   33%
  Extremely poor –   1   8%

- *Completeness of information about library materials*
  Average -   11   100% (one did not answer)

- *Response time of the system*
  Excellent –   1   8%
  Above average –   4   33%
  Average –   3   25%
  Below average –   2   17%
  Extremely poor –   2   17%

Parts 2 and 3:

For parts 2 and 3, all twelve participants answered parts 2 and 3 with YES or NO. Only ten offered explanations to their answers.

Part 2:   Did you find it useful to have books, journals and journal articles retrieved together in your search? Explain.

YES – 7 (5 explanations)

1. Gives a choice of things which you might not have considered.

2. I did. I'm not sure if this is because this is a pilot but all the titles when displayed it said: libraries that have this item: and it listed hshsl and that was it - it should have listed other libraries in the consortium or have denoted that it was searching through the entire consortium vs just HSHSL. (Note: I had selected to search all usmai catalogs - not just HSHSL).

3. I prefer to have them separated--because I'm a librarian--but I think students might like having the two integrated.

4. For this particular search I wanted a historical perspective as well as current research. For other searches that wouldn't be useful; I would want just recent articles.

5. I like the idea of replace it with the current catalog. But not an ideal tool to look up for articles. And would not like the articles results to be shown at first than books

NO - 5

1. Defaulted to libraries worldwide and not HSHSL. Mostly brought up books and no articles. Many irrelevant hits. Takes forever for location to load.

2. I'm usually looking for one or the other... not both.

3. It seems confusing and not clear.

4. Not an effective way of searching. Results are only the result of keyword searching. No way to create a stronger search using medical and/or subject heading terms, which is essential for our user group.

5. I searched for "The Bell Jar," expecting to find the book. But, retrieving a series of articles first was confusing.

Part 3: Do you think that WorldCat Local is a useful tool? Explain.

YES – 8 (6 explanations)

1. It could be depending on the topic being searched. Interestingly it seems to be bringing up better results than the day we did this as a group. I am on the fence about this product.

2. Seems to work. But I wonder if it might tend to retrieve *too much* at any one time. Guess that depends on the individual search. I wouldn't want to have to weed through an entire universe of hits that actually presented me with way more than I needed.

3. I like the worldcat.org and I find it to be very useful. I am sure that this will be a useful product when all is ironed out.

4. It seems like it could replace the catalog. Their functionality is comparable.

5. What I liked: I thought the interface was fairly user friendly and intuitive and I liked having the ability to refine results (limits on left of the screen). The relevancy ranking was helpful and I liked having the ability to tag results. What I didn't like: Unable to display results for a specific USMAI library (other than UMB). The search was slow. I wish it was easier to display results from a single article database. Item records are very long--so much scrolling required! Finally, I would want to know if it's possible to include the "find it" button on the article records (this would be essential).

6. I do like the side-bar that allows you to limit by material type on your front-page view.

NO - 4

1. Not useful - not able to do quality searching. Looked at breast cancer survival and was not able to easily link to FT. This is not a good product for our users.

2. Can't search using specific subject headings and subheadings. Yet another interface to learn. Why doesn't Find It button look like it does in other databases and the book catalog?

3. It's not a good if not a replacement for current usmai catalog.

4. Took too long to search and load results. Images came up quite late.

Some other findings and considerations

Besides what is evidenced in the results of the survey, the work group has identified other problems with WCL, some of which are enumerated below:

1. Adding subscription databases through the Metasearch to the basic search, results in slowing down the search response time to such an extent that it is not advisable to add even one of these databases to Worldcat.org. Therefore, no databases from Metasearch were included in the basic search at the time of the survey. We understand that the "Response Time of the System" question rated higher than the others, for this reason.

2. Having the subscription databases in the Advanced Search option is the only viable solution. This is not at all intuitive to the user. No one in the survey mentioned having used the Advanced Search option nor encountered additional databases there.

3. Those databases that are already included in WorldCat.Org are not recognized as such in the search results. So that, if Medline is being searched as a part of WorldCat.Org, and CINAHL is added to the basic search through self-configuration, when the result list comes up, the left pane delimiter will show the amount of hits from CINAHL, but Medline is not included in that delimiter pane.

4. The interface has annoying blank square spaces when there is no book cover available, or when it does not apply, which is the majority of the cases, since most hits are articles. The "detailed" record view page has very little detail, and yet is so large that it invariably needs scrolling down to see the complete page for one single resource.

5. It takes too many clicks to get to the full-text. The Find It button is not included in the hit list. Only in the detailed view of the record.

6. Relevancy ranking takes into account key words in title, author and table of contents (and location if "Library and relevance" is selected). It is surprising that, coming from a cooperative cataloging organization, it does not take into account subjects in its relevancy ranking. If another sort option is selected, for example, "Date (newest first)", totally irrelevant results float to the top of the hit list.