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Tactics Session C: On Beyond E-Journals: Integrating E-books, Streaming Video, and Digital Collections at the HELIN Library Consortium

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Amy Carlson, Recorder

Abstract: With trends in collection development moving towards digital, streaming resources, and acquiring sets of materials, the HELIN Consortium pulled together cataloging, acquisitions and licensing information through a discovery platform. The discovery layer, in this case Innovative Interface's Encore, harvests disparate collections and enables the library user to easily refine her search through facets. Rice Sanders described the HELIN Consortium's Encore implementation and experiences, while McQuillan highlighted the West Bloomfield Townships Public Library use of the Encore platform and other products.

Keywords: Discovery layer, facets, streaming video, e-books, electronic resources, digital, tag cloud.

Martha Rice Sanders opened the session with background information. The HELIN Consortium is a mixed consortium. Ten academic libraries, ranging from the Community Colleges of Rhode Island to the University of Rhode Island, fourteen specialized libraries including all of the non-profit hospitals in the state and the state Law Library make-up the consortium, sharing an integrated library system and pursuing other joint ventures. Regional concerns add to the group's complexity: most of the libraries are in Rhode Island, but two members are located in Massachusetts and the District of Columbia. The diversity of libraries which make-up the HELIN Consortium directly informs the consortium's approach to their Encore Interface. Recently, the HELIN Consortium celebrated their twenty-fifth anniversary. The Directors of the ten academic libraries sit on the Board of Directors for the consortium, setting a strategic agenda for the Executive Director. The central office employs three full-time and one half-time librarians. Task forces, committees and affinity groups meet between three and six times a year to make decisions, trying to find solutions, which makes the most librarians happy, rather than the lowest common agreement. Some of the strategic directions on the consortium's agenda this past year included cooperative purchasing and licensing of e-content, centralizing technical services in the central consortium's office, identify professional development opportunities, evaluate the current integrated library system and pursue a single-box search solution for discovery.

Changes in collection development partly drive HELIN's evolution. The changes in acquiring and cataloging practices from one-by-one to sets of electronic content alter the approaches to processing and discovering these resources. The trend to buy packages or groups of titles began with electronic journals, and now the trend is moving into e-books and other types of digital media. Now, the most recent thing is for streaming content. HELIN has been accessing databases of music materials from places like Alexander Street Press for awhile, and while setting up trials and invoicing members for their purchased content, Rice Sanders has found several of the member libraries

purchased all of the available video databases, indicating a new direction for collected content.

Innovative Interfaces is HELIN's Integrated Library System (ILS). They use Encore as their interface, but some member libraries prefer to use the traditional interface and the consortium allows their members flexibility in their public face. They were one of three or four consortial purchases of Innovative Interfaces' Electronic Resources Management (ERM) system. Fourteen libraries are set up and many more are looking to utilize the system in the near future. In term of locally created resources, the members have eight instances of digital commons through Bepress: seven for individually libraries and one for the HELIN Consortium itself. One library subscribes to Innovative Interfaces' repository software, Content Pro, and another one licenses DSpace.

For the last fifteen years, the consortium has cataloged traditional and electronic materials. They began with original cataloging for electronic journals from some of the larger, more stable packages and continued the practice with databases and e-books. The group decided early on that they would use separate records for print and electronic materials when they could avoid it. When CONSER made the neutral cataloging decision in 2003, this upheld the process already embraced by the HELIN Libraries. Different holdings and the confusing display to patrons drove the decision-making in this case, so that if Library A had the paper version of the journal and Library B only had the electronic, it would be clear to the patrons of either Library A or B which they could access. When the academic partners subscribed to Serials Solutions in 2004, having separate records facilitated this new workflow and allowed for standardization of practice across the member libraries. Everybody has an A-Z list, the coverage database and all but one library uses the link resolver. Each month, a de-duplicated set of bibliographic records for the electronic journals is loaded into the system, which allows for a more efficient workflow and more regulation of potential duplicate records in the catalog. While the option exists for e-books, the consortium has not yet implemented loading bibliographic records for e-books from Serials Solutions as with journals. They do receive bibliographic records from providers for packages, but they also have a guideline that if a package has less than 100 titles and no records come with the package, the library has to catalog them individually with their utility. By centralizing the process to load the bibliographic records through the HELIN office, Rice Sanders can work with the vendors to ensure minimum standards set by the consortium.

This greater integration of resources results in more information for the public to sift through as they search the catalog. Many of their patrons approach the catalog without having an understanding that the catalog intermingles electronic and print materials, and many of the member libraries have their electronic resources on separate web pages, which increases the number of paths to find the same information. By utilizing a one-box search tool, patrons can use the robust tool to narrow their searches. With the title, Beyond E-Journals, in mind the consortium has purchased and licensed products such as e-book sets (for example, EEBO, ECCO and the American Council of Learned Societies Collection), streaming media from Alexander Street Press and Films on Demand, and some of the member libraries have been looking at datasets.

Bob McQuillan introduced an overview of the discovery layer platform. One of the objects of the presentation is to demystify the tools used to combine digital media and digital collections, such as e-books and streaming video, into the more traditional

materials in the catalog. Although many vendors have such a discovery tool, the example given today is Encore, from Innovative Interfaces. To integrate the new tool with the decisions already made by the HELIN Consortium members, the new tool needed to be fairly agnostic working with third party metadata services. The third party metadata, such as bibliographic records and coverage information from Serials Solutions, works well with the highly integrated cataloging, acquisitions and ERM already in place, allowing for greater analysis of cost, coverage and use of the purchased materials. Encore provides a unified search and discovery tool across many different pieces, combing elements from the ERM, the catalog and the acquisitions information.

The goal for Encore is to expose digital content in every search. One of the main topics of the presentation is to harvest digital collections and push them to the forefront of a user's results set. This discovery layer promotes the range of resources the library holds to all of its users. The harvesting process relies on standards, such as the Open Archives Initiative (OAI) and the Protocol for Metadata Harvesting (PMH). Harvesting is done in advance of the search, which provides the advantage of indexing your content locally in your system. This also gives the library an opportunity to normalize and minimize duplication. With a discovery platform, users may search against the entire portfolio collection, whether they're built on MARC or XML-based, such as Dublin Core or Encoded Archival Description (EAD). With this kind of discovery platform the user does not have to consider searching for formats or to which resources they have access. The search technology integrates cataloging and harvested resources into a single results set, where facets allow the patron to drill down into a more refined results set.

A feature of the platform allows participation from the user community. Community tagging is a kind of untapped methodology for describing local collections. It allows libraries to use their user base to add tags to the harvested resources and to already cataloged resources. Library of Congress demonstrated the process in their Flickr Commons project, where they found an engaged public sharing their specialized knowledge through comments in the Commons. Users added 20,000 tags to the Library of Congress Resources on Flickr. While community tagging seems to be more popular at Public Libraries than Academic Libraries this trend is beginning to shift. An example of community tagging from the University of Nebraska at Lincoln can be seen in the record describing an electronic rodent repellant device. With input from the students about tags, the favorite was rat zapper. Community tagging opens the door to a new range of possibilities for exposing partially described content in an increasingly useable way.

Another piece is the digital repository. Content Pro piece is a storage and access platform, while Encore acts as a discovery layer on top of the digital repository. It is idea to store maps, photos, documents, and audio/video materials. An example of Content Pro comes from the Scottsdale Public Library. If the user hovers over the collections on the page, she can see the contents of each collection. The harvesting piece of Encore integrates these collections with more traditionally found materials in the user's search results.

The HELIN Consortium bought the Encore platform as a package deal with their ERM. The consortium began to use Encore for a while, and single-search box has become familiar to patrons. With the harvested content, patrons can access the materials either through the native sites or they can find it all in one place. Facets allow the patron to hone in on certain aspects of their search, such as finding results that include Newport,

Rhode Island as a search term, limiting location to Salve Regina, looking for print published in 2010 and only in English. In seconds the user can drill down to that level. In addition to the faceted searching, Encore also provides contextual linking and community tagging. With the change in platform look or skins just prior to the presentation, some of the terminology for the tag cloud had changed in the update and the consortium's task forces and committees had not yet met to discuss and agree upon changes. These additional tags are populated by subject headings, enabling the patron to narrow the search results.

In Encore, icons give a visual clue to patrons for material types. These icons not only provide a format indication for the user, but also act as a facet to drill down the search. The material types are in MARC format, acquired from whichever utility the member library uses. Similar to the recent change in terminology with the community tagging, the material type requires additional refining by the consortium members when describing electronic content. Currently, HELIN's Encore describes any electronic item—e-book, electronic journal, electronic map, streaming video—as a web resource. The summer of 2011, the group plans to determine new material types to add to help refine the electronic content for their users. Rice Sanders described how, for three years, they felt fairly confident about the new terms to include, such as e-book, e-map and e-journal. Now, with streaming video and other types of electronic content, the group needs to agree upon labels for other kinds of electronic content. Rice Sanders will need to make the material type changes to the database individually, using Millennium's global update function, once the decision for new material types have been made consortially.

Applying information from the ERM adds coverage and access information not found in the catalog alone. With an example of two different e-books, Rice Sanders showed the enhanced data in the Encore record, which included indications of fulltext access, and name of the originating resource or package. For journals, the range of holdings would also show. With the new Encore skin, a recent change prompted new ways of access the information from the ERM, but by opening the full record, the user can see the information about format, access, availability and so on. Rice Sanders is encouraging the member libraries to fill out the template she has set up, which is based on consortial purchasing or information from publisher's websites. Currently, the set up for the libraries is about 40% complete, and many of the members' libraries have greater interest in implementing the ERM piece.

To demonstrate the process of accessing information and resources from the member libraries digital repositories, Rice Sanders walked through the process of searching and discovering using the Encore platform. Continuing to use the search term Newport, she showed how to find materials from disparate places: from separate collections, which are on separate databases, added separately, developed separately, yet, because of the common platform, can be found easily by the researcher in one search. In Bryant's repository she found historical letters—where the text of the letter is encoded into the Encore metadata--from their collection of letters from World War II; from Johnson and Wales, she highlighted the menu collection, which supports their hospitality, tourism and chef programs; from Providence College, she uncovered faculty papers and historical newspapers, including early translations in French and English; from Roger Williams, she came across primary materials from local organizations; from Salve Regina, she found thumbnails from their photographic collection; and from the

University of Rhode Island, she discovered a peer reviewed journal, seniors honors projects, and dissertations and theses all relating to the search term Rhode Island.

About a month ago, the consortium added Synergy into Encore, which harvests article content. This adds a new type of discoverability for the user, allowing the user to mouse-over the article to view metadata for the article in Encore, and the facets for the articles originates with the native database. Currently, the consortium is using this with the Ebsco databases and all of the facets appearing in Encore are expressed from Ebsco themselves. Rice Sanders asked the audience to reflect on the importance of a journal as a container or even a platform for articles in a world just beginning to embrace the emergence of articles alone.

McQuillan provided another example of a library using Content Pro for their digital repository and Encore as their discovery platform. The West Bloomfield Township Public Library has used Content Pro for about two years, creating eighteen collections. They decided upon a digital repository when they worked on a project with the West Bloomfield Historical Society. They view the repository as a work in progress. Accessible from the main webpage, they decided they would highlight particular collections one-by-one. The Online Content Committee wanted internal and external collections to be relevant; they identified partners and volunteers to train and to help with the collections, and they hoped, through this process, to cut down on the amount of web pages that required separate maintenance. Some examples of how they used the digital repository include a sandbox for staff to tinker with ideas and images for future promotion or program use, image collections, video reviews by librarians, information and interior pictures of the library building itself, and a collection of video book reviews as part of a summer reading program, where patrons were filmed with flip cameras talking about a favorite book.

The session came to a close as McQuillan demonstrated other services, working in conjunction with the repository and discovery layer pieces. By searching for Lewis and Clark in their catalog, McQuillan showed how to use the facet e-book to narrow a search. The West Bloomfield Township Public Library uses ContentCafé for book jackets, which provides enriched content, such as reviews, table of contents, summaries and such. Pathfinder Pro offers contextual linking, allowing the libraries to give links to resources that are appropriate to elements in the record. The context is established either by a search term or by the bibliographic record retrieved as a result of that search. As an example, McQuillan looked at the record for Shakespeare in Words and Music, pointing out the explore button on the screen, which conducts a search on title, ISBN information in a review source or the author's name in a biographical database. This way, the library maximizes their licensed electronic content, and the user more easily finds, not only content, but sources created or enhanced by members of their own community.

Following the presentation, an audience member commented that although the discovery layer was created to incorporate their locally digitized materials she's found that the repository materials do not float to the top. She asked if they could suggest how to promote these types of materials in the discovery layer. Both Rice Sanders and McQuillan recommended relevance ranking to make these materials more findable.

Contributor's notes:
Martha Rice Sanders is the Knowledge Management Librarian at the HELIN Consortium.
Bob McQuillan is a Senior Product Manager with Innovative Interfaces, Inc.
Amy Carlson is the Head of the Serials Department and Acting Head of Collection Services at the University of Hawaii at Manoa Library.