

University of California Libraries

Discovery Systems and Services: Principles and Goals

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Background

The University of California Libraries expend significant resources to obtain, license, organize, digitize and preserve information in multiple formats. As libraries and researchers transition from the legacy print world to a primarily digital research environment, information discovery systems and services are also evolving. The movement by students and faculty toward the use of networked (Web) level information discovery systems, including search engines and large content gateways, is widely recognized.

Web scale discovery services are typically commercial systems designed for the library environment that aggregate preharvested, normalized, and centrally indexed content. These aggregations, sometimes referred to as “next-generation” catalogs, include MARC metadata records, as well as metadata associated with journal articles, e-books, and other digital content. Assuming users have the right to view the content, links from the metadata record to the full object allow access within the native environment. Beyond Web scale discovery services, a significant number of academic, disciplinary, and topical aggregations of digital objects and their associated metadata offer users powerful search and discovery options for both traditional and non-traditional collections.¹

Given the dynamic nature of both user behavior and technological development, opportunities abound for the UC Libraries to contribute to – and innovate within – the emerging information discovery environment. Indeed, the UC Libraries are well poised to significantly expand access to the resources under its stewardship for communities both internal and external to the University.

Strategic decisions about discovery systems must take into account myriad factors, not the least being the needs of the UC academic community and the pressure of limited resources. It is incumbent upon the UC Libraries to articulate a set of principles and goals that serves as a foundation for decision-making in the investment of resources in discovery systems, tools, and services. The purpose of this paper is to provide the framework for a broader discussion about those principles and goals.

Principles

The principles guiding UC Libraries' decisions about the investment of resources in discovery systems, tools, and services are:

1. As feasible and appropriate, UC's content will be included in and exposed via network-level content aggregation and discovery environments.
2. External network level discovery systems and services that meet the needs of our user communities will take precedence over locally built systems when quality options exist.
3. Local discovery systems and services will be built when the needs of our user communities, or the discovery and display requirements of a content type, can not be met through existing or anticipated network-level discovery systems and services.

Goals

The foundational goals supporting UC Libraries' actions and decision-making about information discovery systems and services, local and network level content aggregation systems, and relationships with content vendors are:

1. Reduce "information silos" by increasing the amount of aggregated content accessible through Web-scale discovery services and other network level aggregations.
2. Aggregate and expose the broadest spectrum of content types to discovery systems: e.g., digital resources, datasets, Web archives, physical artifacts, or special collections.
3. Aggregate UC content in Melvyl.
4. Embed information discovery tools within faculty and student academic workflows.
5. Create metadata records that support and enhance information discovery, navigation, and durable linking for multiple content types.
6. Advocate for open metadata within the broader information marketplace.
7. Encourage licensed content vendors to expose their content and record sets to network-level discovery systems.
8. Encourage licensed content vendors to adopt trusted authentication protocols stressing federated identity management and privacy protection, e.g., Shibboleth.
9. Ensure UC institutional branding is available on content contributed, selected, or licensed by the University of California.

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¹ Web-scale discovery services are services designed for the library environment that aggregate preharvested, normalized, and centrally indexed content. In his 2011 Library Technology Reports article, *Web Scale Discovery Services*, Jason Vaughan defines web scale discovery as "a service capable of searching across a vast range of preharvested and indexed content quickly and seamlessly." See: <http://alatechsource.metapress.com/content/g4r806036122/>