

Summon Implementation @ UIC

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Selection Process

Discovery Tool Selection Criteria

Make all UIC resources accessible

- Electronic full text and print
- Purchased and free
- Local and consortial
- Single search box with faceted navigation

Discovery Tool Selection Criteria

Combine best features of previous products offered to UIC users

- WebFeat federated search development beginning in 2000
- Voyager-based catalogs implemented in 2002
- WorldCat Local beta access beginning in 2009
- Easy Search search and discovery tool implemented locally in 2011

Discovery Tool Selection Criteria

Leverage efforts already made

- Database in Serials Solutions
- Shared resources via I-Share and other partnerships (Hathi Trust, CRL, etc.)
- Local digitization and indexing efforts

In 2011, Summon offered to meet all of our criteria at a reasonable cost

Challenges to Summon

- Make all of our resources discoverable
- Make all sharable resources discoverable
- Eliminate from display resources that really aren't available
- Give precedence to local holdings to eliminate unnecessary ILL
- Include status and location information
- Eliminate duplicate UC records
- Don't overburden the I-Share Voyager server

Implementation and Testing

Contract signed at end of 2011
Special challenges addressed in 2012
Summon offered to users at the beginning of 2013
User testing underway

Part II Ling Wang

Technical issues encountered during Summon implementation

Technical issue 1: Connectivity

Xserver to connect
High performance impact
Heavy load on Carli Voyager server
Slow response time

Technical issue 2: Item status retrieval

due to the different ways Summon and VuFind
check item status of I-Share holdings

At the time of implementation, Summon
was designed to check item status on
every item/record listed on the search
result page.

VuFind doesn't provide item status for
everything at once

In UC, VuFind checks item status until there is
a hit for the first "Available" item, then it stops
checking.

Solutions:

VuFind as gateway instead of Xservers to connect directly to the Voyager database

VuFind's APIs pull item availability information into the Summon interface.

Low impact on Voyager servers

Technical issue 3: Placing UIC holdings on the top

Order of I-Share available items in VuFind is random so that the top school alphabetically is not always listed as the first choice

Solution: A new feature is needed

The feature should allow the client to configure the priority order of display of IShare holdings.

UIC holdings should be on the top for the available items.

Participant Record Prioritization Institution Whitelist

UIC results always appears in the top 6 facets value except when UIC doesn't hold any searched item.

In addition to this new feature,
Library Location facet was added
to prioritize the library locations.

**Technical issue 4: Dedupe UIC and UC
records indexed**

Technical issue 5: Remove the e-items

from UC uploads before loading into Summon

To keep Voyager and Summon in sync:

Update bibs and MFHDs: bibs and MFHDs
that were added or updated in the last 24
hours and are not OPAC suppressed.

Delete bibs and MFHDs: bibs and MFHDs that
were deleted or changed in the last 24 hours
and are not OPAC suppressed.

Evaluation: The user's perspective

Steve Brantley and Gwen Gregory

Goals:

- Decide whether to keep Summon or WCL
- Improve interface of selected product as needed

Side by side usability testing

Passive data collection:

- a. Discovery tools are presented side by side on the [Library landing page](#)
- b. Service alert feature announces Summon and [requests feedback](#)

Side by side usability testing

Active data collection

Now performing usability tests between Summon and WorldCat Local to compare:

- feature set
- ease of use
- user preference

Side by side usability testing

Subject groups:

- Undergraduates
- Graduate students
- Health science professional students
- Faculty

Interviewing 6 from each group

Side by side usability testing

- "Think aloud" protocol requested and prompted by interviewer.
- Two interviewers per test. One to provide tasks and answer questions, second to observe and take notes.
- Subjects evenly divided between testing Summon or WorldCat Local first

Side by side usability testing

Interviews recorded with browser session capture and audio (Camtasia)

Analysis will look at quantitative results...

- number of clicks to accomplish a task
- time to accomplish a task
- "errors" or misunderstood navigation

...and Qualitative data

- subject's commentary
- subject's opinion

Side by side usability testing

Individual interviews with prepared questions

Questions designed to elicit an understanding about how easily users are able to find and retrieve:

- Locally owned book
- Consortial owned book
- Book for which interlibrary loan request must be initiated

Side by side usability testing

1. Includes tasks for searching known articles to help us understand how easily users access full text
2. Users asked to manipulate results with a variety of limiting features (facets) and deliver selected results
3. Measure user's estimation of general relevancy of results in a topic provided for them and a topic of their choice

Side by side usability testing

Follow up questions for each tool:

- Evaluation of features
- User preferences

Final questions:

- Compare tools
- Pick which they prefer

Side by side usability testing

April 24 - May 3, 2013: Conducting interviews

Submit report to University Librarian by June 15, 2013

Contact Information

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side by side



