

## **WorldCat Discovery: Updates from the MLA/MOUG OCLC Search and Discovery Task Force**

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### **Presentation Notes 3/3/16**

1. Good morning. The WorldCat database is eminently useful as a collection development tool because it allows bibliographers to learn what is available in libraries worldwide as well as where particular items are held. Today I will comment on WorldCat Discovery Services from the point of view of the MLA/MOUG OCLC Search and Discovery Task Force, pointing out
  - a. Functionality that is currently not present, compared to FirstSearch, with emphasis on music use,
  - b. Salient aspects of searching and display
2. [Advance to slide 2] OCLC launched WorldCat Discovery Services in 2014 to serve as a library discovery layer that provides access to the WorldCat database. As of the MLA annual meeting in 2015, OCLC planned to discontinue the First Search Service on December 31, 2015, and transition First Search customers to WorldCat Discovery. Over the summer of 2015, OCLC announced that it will require per-search customers to transition to WorldCat Discovery on December 31, 2015, and will delay the transition for unlimited customers until late 2016. Libraries that choose to use WorldCat Discovery Services as a discovery layer can provide single search access to their local holdings, WorldCat, and subscription databases. Libraries can also elect to use WorldCat Discovery Services to access WorldCat only. WorldCat Discovery is currently available to FirstSearch subscribers.
3. After the 2015 Music Library Association meeting in Denver, when a number of MLA members expressed concern about the discontinuance of the FirstSearch service, MLA President Michael

Rogan and MOUG Chair Bruce Evans established the Joint MLA/MOUG OCLC Search and Discovery Task Force:

4. [Advance to slide 3] With me as chair, consisting of Tom Bickely, Laura Gayle Green, Stephen Henry, and Carlos Peña representing MLA and Rebecca Belford, Marty Jenkins, Hermine Vermeij, and Brad Young representing MOUG.
5. [Advance to slide 4] The Task Force was charged as follows: “Working with the Music OCLC Users Group, investigate OCLC’s WorldCat Discovery Services to determine if it will be sufficient to meet the needs of music users. If the Task Force determines that WorldCat Discovery Services is not sufficient, it will recommend a course of action to petition OCLC to continue to provide the FirstSearch interface for WorldCat after December 31, 2015. It will also recommend a course of action to petition OCLC for specific improvements to WorldCat Discovery Services to meet the needs of music users.
  - a. The original transition date came and went, and we still have FirstSearch, but OCLC currently plans to transition in 2016.
6. [Advance to slide 5] The Task Force referred extensively to three documents while examining WorldCat Discovery beginning during the summer of 2015:
  - a. Rebecca Belford’s article, “Evaluating Library Discovery Tools through a Music Lens” provided an excellent template for evaluation of WorldCat Discovery in an appendix
  - b. “Item Bibliographic Data as Displayed in the WorldCat Discovery Interface” lays out which MARC fields and subfields are displayed, as well as where they can be found in record displays.
  - c. “Searching WorldCat Indexes” provides information on all the indexes present in the WorldCat database, along with how they may be searched in various interfaces. This will be particularly useful to library staff who need to search in WorldCat Discovery with

indexes that are not made available intuitively to library users through the data fields available in the drop down menus in the Advanced Search.

7. [Advance to slide 6] Using Belford’s checklist, the Task Force evaluated two instances of WorldCat Discovery:
  - a. Virginia Tech
  - b. Melvyl (University of California System)
8. [Advance to slide 7] Users can search using
  - a. [advance bullet] A basic search screen that provides keyword searching from a single search box. Library staff can also use this box to execute command line searches using index labels in a manner analogous to the Expert Search in FirstSearch.
  - b. [advance bullet] An advanced search allows users to pick which data fields to search from a pre-defined drop-down menu.
    - i. [advance bullet] Users can elect to add rows to search as many fields as desired
  - c. [advance bullet] Libraries can customize WorldCat Discovery to search only WorldCat by default, or to search many databases at once. Users can change the default selections.
  - d. The appearance of the search page in WorldCat Discovery is much plainer than the search page in FirstSearch, and some of the functionality has been moved to the post-search facets.
9. [Advance to slide 8] Nested searching is a default feature of FirstSearch that allows users to combine search strings using Boolean operators assuming there are parentheses around each search box. WorldCat Discovery doesn’t currently do this.
10. [Advance to slide 9] To give an example, adapting a sample search suggested by my colleague Maria Perez-Stable, on Monday, I searched for the string **england OR “great britain” OR “united kingdom”** in the top box as subject, **“brass band”** in the second box as keyword, and **girl\* OR**

**wom\*** as keyword in the third box, in both WorldCat Discovery and FirstSearch, with **AND** operators between each box. WorldCat Discovery retrieved 6,511,431 results, and FirstSearch retrieved 9, indicating that each line had parentheses around it in FirstSearch, but not in WorldCat Discovery.

11. When I input the same string using index labels and parentheses in a single keyword box in WCD, I got 12 results, a performance much more like the Advanced Search in FirstSearch.
  - a. It would not be reasonable to expect users to know to do this in the transition between FirstSearch and WorldCat Discovery. In the meantime, library staff will benefit from the “Searching WorldCat Indexes” document I referred to earlier in this presentation.
12. [Advance to slide 10] A note on special characters and words
  - a. [advance bullet] Diacritics are not necessary for searching for words that contain diacritics
  - b. [advance bullet] Diacritics, sharps, flats, special characters, and the phonogram and copyright symbols all display
  - c. [advance bullet] Stopwords, (articles and pronouns, for example) can be searched if enclosed in quotation marks – otherwise the system will ignore them
  - d. [advance bullet] Boolean operators must be entered in ALL CAPS to function, otherwise they are stopwords.
13. [Advance to slide 11] Let’s take a look at a record display screen. After conducting a search, records are displayed in a brief view on the right hand side of the screen, with post-search facets available on the left side. After clicking on one of the results, users will see a screen that looks like the one on this slide. The brief view of each record is now located on the left, and a full view is located on the right. To get to most of the bibliographic description, users need to expand the

“Description” option. Notice that holdings are displayed under the “Availability/Holdings” option.

14. [Advance to slide 12] See here that the fuller description is available side by side with the brief view, allowing the user to see the title, authors, date, primary format, and local holdings.
15. [Advance to slide 13] In the record display
  - a. [advance bullet] Subfields generally appear in the same order in the display that they do in the MARC record
  - b. [advance bullet] With the crucial exception of the 245 subfield \$c, which does not appear in WorldCat Discovery
  - c. [advance bullet] This could be a problem for users looking for a work by a pseudonymous or incorrectly attributed author.
16. [Advance to slide 14] Discussions of headings occupied a lot of the Task Force’s time and energy.
  - a. [advance bullet] One will find personal and corporate name headings together in the brief view, as space allows.
  - b. [advance bullet] Uniform titles display and link to searches on the term in the uniform title fields, but only when they come from 240, 130, or 730.
  - c. [advance bullet] Name-title headings do not display, and are not searchable in any meaningful way.
  - d. [advance bullet] Only the subfields \$a, \$b, and \$c of personal name headings display or are linked, and subfield \$d is not hyperlinked or displayed, presenting a problem for name headings differentiated only by date.
  - e. [advance bullet] Consider a record for *On the Transmigration of Souls* by John Adams
    - i. [advance bullet] Clicking on John Adams takes the user to a list of works by John Adams.

- ii. The first results that display are by a different John Adams. Prominent among them is *The Works of John Adams, Second President of the United States*.

f. [advance bullet] Subject headings display, and are hyperlinked.

17. [Advance to slide 15] Users can use facets to narrow searches after they have been performed.

Facets include:

- a. Sort by
  - i. Library then relevance
  - ii. Relevance only
- b. Library
  - i. Libraries worldwide
  - ii. Local library
- c. Content – more useful if using WCD for a discovery layer
  - i. Full text
  - ii. Peer reviewed
- d. Format
  - i. Many icons and format choices available. Note that according to WorldCat Discovery's terminology, "music" means recorded music, while "musical score" means printed music.
- e. Author
- f. Databases
- g. Year
- h. Language

- i. Topic – these are not subject headings, but rather *Conspectus* topics<sup>1</sup>
18. [Advance to slide 16] Notes
- a. Most note fields display, along with subfields intended for display
  - b. The 546 language note does not display but is indexed
  - c. The 511 participant or performer note displays separately
  - d. The 518 note displays as “Event notes”
  - e. The 505 contents note displays
    - i. Non-enhanced notes in 505 are not indexed by author or title
    - ii. Authors and titles in enhanced 505 notes are indexed respectively
19. [Advance to slide 17] The publisher number from the 028 field is indexed but does not display, and there is no browse for publisher number available.
20. [Advance to slide 18] The task force has determined that FirstSearch currently performs better for music searches than WorldCat Discovery,
- a. particularly in that it displays and searches on name headings, showing enough of the subfields to differentiate between different people with the same names
  - b. that it displays analytic name-title headings
  - c. that it displays 245 subfield \$c as “Responsibility”
  - d. that it displays all instances of the 028 field
21. The Task Force will finalize and send its report with recommendations to the MLA and MOUG Boards and recommend that the MLA and MOUG boards jointly request changes and a response

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<sup>1</sup> “WorldCat Discovery adds course reserves, topic facet, database groupings and more,” OCLC, May 11, 2015, accessed January 23, 2016, <https://www.oclc.org/news/announcements/2015/worldcat-discovery-may-enhancements.en.html>.

from OCLC. The specific recommendations are under discussion and have not yet been finalized.