

**OCLC'S WorldCat Compared:
Reflections on
FirstSearch vs. Discovery as a Collection Development Tool
Darwin F. Scott
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Good morning! I'm Darwin Scott, Music Librarian at Princeton University, and on behalf of the Resource Sharing and Collection Development Committee, welcome to our session on New Collection Development and Resource Sharing Strategies for Music In a Post-FirstSearch-and-WorldCat-Selection World. I am joined by my two colleagues Bonna Boettcher and Michael Duffy. Together we will speak on three aspects of the ongoing changes with a fundamental library resource, OCLC's WorldCat, that will significantly impact music collection development and resource sharing this year and beyond.

SHOW PRESENTATION TITLE SLIDE

I will open by drawing from my Princeton perspective, including knowledge gained in the past months from direct interactions with OCLC. These are personal, summary reflections contrasting the WorldCat database delivered via venerable old FirstSearch and the new-fangled Discovery system as collection development tools, fully recognizing the evaluations and critiques of WorldCat Discovery now underway by MOUG and the joint MLA/MOUG OCLC Search and Discovery Taskforce that began in 2015, and about which you will learn more later in this session.

SHOW MARCH 31, 2014 SLIDE

At the very end of March 2014, OCLC announced the launch of WorldCat Discovery and the ensuing development of the product over the next eighteen months. Among Discovery's many goals would be the eventual replacement of the WorldCat database's FirstSearch interface. Meanwhile OCLC would keep both products running simultaneously until the end of 2015 in order to fine-tune the system and provide adequate transition time for the subscribing institutions.

SHOW DECEMBER 31 FIRSTSEARCH END DATE SLIDE

When I submitted this session proposal to the program committee at the end of April last year, OCLC was still on track to retire FirstSearch by the start of January 2016. And today we were supposed to be addressing how we were coping with the new system for collection development.

As you all likely know, OCLC has postponed the end of WorldCat via FirstSearch until late 2016, sometime in November according to the latest announcements. So, what happened? In 2015, OCLC ramped up promoting WorldCat Discovery's replacement of FirstSearch, urging libraries to begin the transition sooner than later. To enable user testing, the company supplied requesting libraries unique URLs that integrated the institution's holdings into a live version of WorldCat Discovery, which, by the way, are still operational and reflect ongoing upgrades. OCLC sent forth teams to promote its seemingly innovative product to key research libraries and to gather feedback. They visited the University of Chicago on April 30th, Princeton on June 3rd, and several other major institutions during this period.

OCLC had provided Princeton with the test URL about a month before its reps visited campus. Selectors and reference librarians commenced Discovery testing and the shared

reactions were grim. We sat stone-faced through the June OCLC sales pitch, with collective anger brewing.

SHOW FIRST SEARCH BASIC SEARCH SLIDE

We learned that the Discovery research and development crew considered FirstSearch's basic search screen too cluttered and confusing.

SHOW DISCOVERY BASIC SEARCH SLIDE

Hence a stripped-down, Googlesque experience in the new basic search screen with an all-in-one box and little else.

SHOW FIRST SEARCH ADVANCED SEARCH SLIDE

FirstSearch's Advanced Search screen also suffered a total overhaul as OCLC sought to determine appropriate balance between brevity in display and the need to cover information, and to follow responsive design principles.

SHOW DISCOVERY ADANCED SEARCH SLIDE

Discovery, we were told, now opened the world of knowledge to the user with a new transparency. Among the many enhancements to clear up bibliographic clutter were the absence of subtitles, clustered records for different editions and manifestations, fewer records on the screen, stressing of local holdings rather than those found elsewhere, few sorting options, and the suppression of most of FirstSearch's traditional functionality. During Q & A, the Princeton librarians excoriated the Discovery system, without a single positive comment, despite promises that improvements were under consideration. The reps did admit that no one on the Discovery development team had ever done library reference or collection development, and they had no idea how librarians used the product to do their jobs. We were

blunt enough to ask why OCLC, charged with assisting libraries to function optimally, was imposing such a train wreck on librarians.

The blistering feedback from the campus visits must have caused major shakeups at OCLC in June and July. In late June, OCLC hired Mike Showalter as its new Executive Director of End-User Services (which includes oversight of FirstSearch and WorldCat Discovery).

SHOW SHOWALTER SLIDE

On July 23rd, Showalter announced that based on critical member feedback, OCLC was extending subscription access to FirstSearch beyond the previously announced termination date of December 31 to an undetermined date in late 2016. He promised to add features identified by OCLC customers and to solve the critical problems with the product.

Fast-forward to the ALA Midwinter Meeting this past January in Boston, where I attended the OCLC WorldCat Discovery User Community Meeting. Leading the session was Showalter himself, who admitted that the initial configurations for WorldCat Discovery had not considered how bibliographers, collection development, and complex reference services at research libraries used WorldCat in daily operations. The stinging criticism from the spring campus visits and ongoing complaints from early adapters had substantively effected product development, thus delaying Firstsearch's demise. He understood that an enhanced restoration of FirstSearch functionality was essential. He even suggested that the answer may be two simultaneous iterations of the WorldCat interface, each drawing its data from a shared database to meet the differing needs of its wide community of users. Showalter and I also had an extended conversation later that day. He understood that many academic libraries already have a discovery system and do not need or want the Discovery component of the new

WorldCat, opting instead to limit Discovery to just the WorldCat database. For these libraries, the purpose of WorldCat is to pinpoint what the library does not own, particularly with the focus on potential acquisition or resource sharing. He recognized the need to improve Discovery, noting that major releases were coming in June or July of 2016.

WorldCat has served me as an essential tool for collection development, particularly firm order selection, for over twenty years, and it has been fundamental for my work since I arrived at Princeton in 2009 (I do not use the OCLC Connexion client). Here library acquisitions is a centralized, now off-campus operation, and it's crucial that the staff processing the many orders submitted for music scores and CDs have precise information to obtain the right recording or edition, and to save them from slogging through the morass of duplicate and poor records in WorldCat to locate the best order and in-process record. I select the appropriate record, e-mail it to myself in plain-text format, add price, funding, and vendor data, and forward these annotated WorldCat records via a dedicated e-mail account into the ordering department's workflow. Rushes go out the day submitted or the very next, and normal orders move quickly as well.

SHOW JANDEK SLIDE

Here, for example, is an order submitted late this past Saturday night after receiving a request earlier that evening from a faculty composer for two albums by the eclectic rock singer Jandek. It took about 20 minutes to do the work on my end. Acquisitions processed the order Monday morning.

SHOW UNIVERSITY OF ILLINOIS DISCOVERY ADVANCED SEARCH SLIDE

So what happens to my smooth workflow in the latest iteration of WorldCat Discovery?

I'll use the University of Illinois at Urbana-Champaign's newly launched Discovery replacement for FirstSearch, since Princeton is postponing implementation until the sun sets, although our two versions function almost the same save for a few local customizations. The picture is not encouraging. Let me illustrate with a real example that arose a couple of weeks back. We discovered that Princeton owned only one of the several volumes published in the Danish series of national music *Dania sonans*.

SHOW FIRSTSEARCH DANIA SONANS SEARCH

In WorldCat FirstSearch, an advanced series title search limited to score format while retaining the default sort based on the most attached holdings, brings to the fore the publications not owned by Princeton among the first screen's ten records.

SHOW FIRSTSEARCH DANIA SONANS SEARCH RESULTS

It is a straightforward process with minimal clicks to open each full record, such as the madrigals from the time of Christian IV, volume 3 of the series.

SHOW FIRST SEARCH MADRIGALER RECORD

Opening the record, I can verify its accuracy, mark the record, back up to original list, repeat the process for the next items,

SHOW FIRST SEARCH MADRIGALER RECORD AS E-MAIL

and then send myself the group of marked records in one e-mail to annotate with ordering information and then transmit to acquisitions.

Navigation between the records is simple and straightforward.

Now let's try the same process in WorldCat Discovery.

SHOW DISCOVERY DANIA SONANS SEARCH

The advanced search screen allows for a series or series phrase search limited to musical scores format, but without an option to select record order.

SHOW DISCOVERY DANIA SONANS SEARCH RESULTS

The results show the default display order to be “relevancy only,” resulting in a skewed list of records, an optional pull-down menu to resort the list, and no number of holding libraries showing for any of the titles.

SHOW MOST HELD ORDER FOR DISCOVERY DANIA SONANS SEARCH RESULTS

Let’s try resorting on “Most Widely Held.” A *Madrigaler* volume is first, but no number of holdings libraries shows. And we still have too few records on the screen (5 at the max), with the unneeded discovery features wasting so much space in the left side frame.

SHOW FIRST *MADRIGALER* RECORD FROM MOST WIDELY HELD SEARCH RESULTS

Now let’s click on that topmost *Madrigaler* record. Close examination shows it to be a Spartan master record (with 41 holding libraries) for a FRBRized cluster of 16 like titles. Musically crucial bibliographic description, editions, and format information lay hidden behind more clicks, but the bottom half of the record does detail each holding library, replete with mileage from the Urbana-Champaign campus and a map with driving directions. The left frame repeats records from the re-sorted list.

SHOW DESCRIPTION LINK OF *MADRIGALER* RECORD

After clicking on the Description link, we at last get a full-bibliographic record for this *Madrigaler* volume plus an OCLC no. The brief version of this record in the left frame provides an e-mail option.

SHOW EDITIONS AND FORMATS LINK FOR *MADRIGALER*

Clicking on the Editions and Formats link, we encounter a totally re-sorted list. While our record stays in the left frame, on the right the list starts with a record for 7 libraries worldwide.

SHOW 2ND SCREEN OF EDITIONS AND FORMAT FOR *MADRIGALER*

Where's our *Madrigaler* record? It's now no. 10, with 44 rather than 41 holding libraries.

RECLICKING ON DESCRIPTION LINK FOR *MADRIGALER*

Let's click on the record 10 to verify. Our description has collapsed. The mileage is back and there is a quarter screen of wasted blank space in the left frame. I give up. Let's see if an e-mail will at least capture a bibliographic record.

E-MAIL OPTION FOR *MADRIGALER*

The result: bibliographic minimalism with only six lines of useful information. But at least there's an OCLC number!

SHOW FINAL COMPARISON SLIDE

While the Discovery version of WorldCat does offer linked data and many present and potential interrelationships beyond the twenty-year-old FirstSearch interface that's long been in need of a facelift, the present manifestation of WorldCat Discovery has thrown the proverbial baby out with the bath water, and is a step backward for collection development. The music library community has two formal channels for addressing concerns regarding WorldCat Discovery: MOUG and the joint taskforce. A third venue is for music librarians to advocate strongly for changes at their home institutions through channels in direct communication with OCLC. The organization seems to recognize the need for restoring FirstSearch's basic functionalities (with some updated restyling) that will retain and enhance its vital role for

collection development and reference work while further developing WorldCat Discovery for the broad audience of diverse users it is meant to serve. Let's speak up during the next months to make this happen before FirstSearch vanishes, leaving us with impediment rather than improvement.