MOBIUS ILS Task Force Report—DRAFT 1/15/08

The MOBIUS ILS Task Force was appointed on November 9, 2007 and given a deadline of January 15,2008 for a final report to the MOBIUS Executive Committee. The charge is "to review and develop information, possibly including an RFI, on ILS enhanced search software, review vendor's offerings, and recommend a proposed solution to the MOBIUS Executive Committee and Council." The Task Force had its first meeting in Columbia on December 3, 2007. In preparation for the meeting, we reviewed "Next-generation library catalogs" by Marshall Breeding[1]. The Task Force identified mandatory and optional features in any software we should acquire and compiled a list of questions to ask the vendors based on discussions of features we wanted in our enhanced ILS search software. (See Table A.)

Based on the information in the Breeding report and previous investigations conducted at libraries of the various task force members, we narrowed our choices to 3 software products: Endeca, III's Encore, and OCLC's WorldCat Local. We divided into groups to gather additional information on each vendor. This information was shared during a conference call on December 18, 2007.

During that call, the Task Force members were unanimous in recommending that Encore was the most appropriate of the 3 systems for our needs. Endeca appeared to be very powerful but also very time consuming and expensive to implement. It was also very unclear how Endeca could work with a federated search engine. We eliminated WorldCat Local because its search is based on searching the WorldCat database instead of the local catalogs. While this retrieves excellent results which can easily be displayed by local holdings, several of the MOBIUS libraries have records in their local catalogs which are not reflected in the OCLC database. Also, WorldCat Local only searches indexing databases for which it owns the content. We need a much broader range of databases searchable by a federated search engine.

After the December 18 conference call, a note was sent out to the MOBIUS-USERS-L list as well as the lists for each of the MOBIUS functional committees. Several people from libraries who have been doing their own independent investigations of catalog enhancement software asked us to reconsider AquaBrowser. We originally eliminated AquaBrowser because we thought it would only work with the WebFeat federated search engine and later discovered this information to be incorrect. Two of the Task Force members agreed to gather information on AquaBrowser based on our original set of questions.

On January 2, 2008, several Task Force members participated in a conference call with Donna Bacon at Springfield-Greene County Library to get more information on Encore since that library is partnering with III to test Encore.

Task Force members participated in a conference call on January 4, 2008. At this point we determined that our best two options were Aqua Browser and Encore, and Task Force members were divided on which of the two systems was preferable. The main differences in opinion related to the way each

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[1] Breeding, Marshall., "Next-generation library catalogs," *Library Technology Reports* 43, no.4:5-42 (July/August 2007).

system implements the tag cloud, clarity/simplicity of the search results display, and which system has the best search engine. We tried to get some impressions from students and staff but the results were inconclusive. Participants at one institution preferred Encore indicating that it had a much clearer display. Students at the other institution had a preference for AquaBrowser with a few indicating that Encore didn't appear all that different from the current catalog although the staff seemed to prefer Encore.

At ALA Midwinter, Judy Fox and Ann Riley had extensive discussions with the vendors about AquaBrowser, Encore, and Primo (an ExLibris product). Based on these discussions, Primo was added to the list as a viable product.

We were not able to find a system that meets our vision of "one stop discovery and delivery" with a simple clear integrated results list that can be easily refined or expanded. While both AquaBrowser and Encore are able to include federated search results, for both products this is limited to presenting the federated search results in a separate box (not integrated with the catalog search results). Primo does allow an integrated list although you are limited to searching approximately 10 databases at one time. Primo has not been implemented with any III systems although it has been implemented with several other ILS systems. The added requirement to be able to work in a multi-library environment adds to the complexity. Further investigation needs to be done in terms of the ability to "scope" the catalog to a single library in a cluster. Both AquaBrowser and Primo appear to be able to show multiple views including a MOBIUS view but exactly how this would work needs to be confirmed with the vendors.

Although AquaBrowser, Encore, and Primo have significant differences in terms of the way they are implemented, all 3 systems appear to meet the majority of our needs and be capable of providing our users with an enhanced discovery experience. Please review the attached chart (Table B) for a comparison of the three systems.

Due to the limited time the Task Force had to complete its task, several questions still remain. Members are willing to continue to gather information. The Task Force recommends that an RFP be prepared and sent to the 3 vendors if funding is appropriated for this project. During the RFP writing or evaluation process, the membership should be invited to online or in-person demonstrations of the enhanced ILS software products under consideration, as well as the federated search engines included in the vendors' proposals.

The Task Force was encouraged to look at alternatives if the full funding request is not granted or if we were to receive one time funding with no continuing funds. Possible alternatives which were briefly discussed include: purchase federated search software only, resume Blackwell table of contents service, subscribe to Syndetics or other record enrichment service, and purchase additional III software to ensure that all MOBIUS libraries have the same software. Due to the limited time available, we did not pursue this topic beyond the above list of possibilities. The Task Force is willing to survey MOBIUS members to create a prioritized list if this is desired.

Report Prepared by the MOBIUS ILS Task Force

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Table A—Features

Mandatory Features	Desirable (Optional) Features
Ability to load/link to vendor generated enriched content such as cover art, table of contents, summaries, etc.	
Faceted navigation with ability to narrow a set of search results by attribute.	Faceted navigation with "breadcrumbs" to easily add or delete facets.
Robust keyword searching with ability to place search box in multiple places.	Advanced or Boolean searching capabilities
Relevancy ranking of results	Ability to control relevancy ranking of results or turn off relevancy ranking altogether.
Spelling alternatives or "Do you mean…?" (Alternatives can be automatic or given as a option to user)	
Ability to create RSS feeds	
Ability to work with federated searching tools for accessing licensed databases. Proposal should include such a federated searching tool.	Integration of catalog and database searches in one list.
Real time availability status for retrieved materials.	
Ability to work in multi-library environment	
	Ability to interface with standard authentication tools such as LDAP, Shibboleth, etc.
	Alternative language interfaces
	FRBRized display of results to group related materials together.
	User generated content including tags and recommendations (and ability to control how/if this is displayed)
	Ability to save results in actionable "My Space" (e.g., format citations, issue requests)

Table B--Comparison

	AquaBrowser	**Encore**	**Primo**
Faceted Navigation Features	Facets appear on the right side of the screen. Chicago included Author, format, topic, publication date, geographic region, genre, time period, language, series, location, new books, availability, and source. There is also a prominent "Refine by Call Number Range" above the listing of the results. This is not a standard feature but something requested by University of Chicago. It is not obvious how to get back to the results if you click on a facet. You need to click on the term in the search box and choose to either Remove or Keep it.	Facets appear on the left side of the screen. CSU Fresno included Search by subject, title, author and facets for format, collection, language, publication date. There is a link to Recently added materials above the tag cloud. It is not obvious how to get back to the original results. You need to click on the "X" by the tag in the search box.	Faceted navigation is available with various options for the facets to display.
Tag Cloud	The tag cloud is designed to expand the search. Clicking on a term in the cloud executes a new search. It appears that the relevancy ranking takes into account the original search term. This needs to be verified with the vendor. To get back to the original results, the original search needs to be re-executed. Some people find the tag cloud to be confusing with terms that don't have any clear relationship to the search.	The tag cloud is designed to narrow the search. It is labeled "Refine by tag". Returning to the original results is similar to the way it is done if a facet is chosen.	Doesn't incorporate tag cloud except when looking at specific record and then you can view tags other users have added.
Search Result Differences	In a search of "Austen memoirs" it searched on both "memoir" and "memoirs" giving an excellent result list. In a search for "C++", it pulled up the appropriate	In a search of "Austen memoirs" only 1 result was retrieved for memoirs of Richard Austen Butler. Redoing	In a search of "Austen memoirs" , "memoir" is not searched. In the "Christmas"

	computer programming books although the tag cloud results were based on strictly letters. In a search for "Christmas", the user was told that "Your query has been expanded with these terms: Xmas…" The search engine also searches "see" references from the catalog authority file to enhance search results.	the search as "Austen memoir" retrieved more results but this option was not presented as an obvious choice. The "Christmas" search was similar to the AquaBrowser results although it didn't appear to pick up the extra search terms such as XMAS.	search, it doesn't appear to be searching on any variants. In the C++ search, it does find the appropriate programming books. It also offers some suggestions for possible new searches.
Spelling Alternatives	Spelling alternatives come from spelling dictionaries built into the back end of the engine and from indexed terms of bibliographic records. A "Did you mean…" option is available, and spelling alternatives are integrated into the tag cloud.	Spelling alternatives come from indexed terms of bibliographic records. A "Did you mean…" feature is included.	It appears to truncate if a word doesn't exist. "Memoor" searched on "memo" and didn't offer any other suggestions. If a word doesn't exist, you get a "Did you mean… ? For instance Thankgiving generates a "Did you mean Thanksgiving?"
FRBR Display	Some FRBR-style grouping of results is available as an add-on feature.	Waiting for consensus to develop on best practices for FRBR implementation.	Does group editions together in a FRBR displa y with message such as "2 versions of this title published in 2 languages between 1995-2000".

Embedding Search Box	Search box can be embedded in external webpages.	Search box can be embedded in external webpages.	Search box can be embedded in external webpages.
Federated search options	The vendor does not sell a federated search engine of their own. Vendor claims to support WebFeat, Serials Solutions, and other unspecified federated search tools. Oklahoma State reports that integration of Serials Solutions federated search is not yet operational.	The vendor sells ResearchPro as the preferred federated search engine but also supports Metalib (an ExLibris product). ResearchPro is only available as a hosted service and charging is based on the number of databases accessed.	The vendor sells this product with its Metalib search engine.
Federated search results integration	AquaBrowser results are not integrated with catalog results.	ResearchPro results are not integrated with catalog results. You need to click on a link in the lower right corner of the screen. This may be moved up to be a little more visible.	Can show results in one list or through tabbed approach. Search in external databases can be run concurrently with catalog or as separate search.
Implementation Issues	Data is extracted from the local ILS to a separate search engine through an automated process. May require purchase and maintenance (including a network connection) of an additional server for each MOBIUS cluster catalog.	There is no export of data as long as the ILS is running III Millennium. Requires the purchase of an additional server for each MOBIUS cluster catalog. Requires the maintenance of a network connection for each server purchased.	Data is extracted from the local ILS and other local databases to a separate search engine through an automated process.
ADA Compliance	Not officially ADA compliant, but complies with ISO & EU standard for visually handicapped.	Deferring accessibility issues to a later version.	Unknown at this time.

Interface with INN-Reach	Can provide pass-through search link to INN-reach catalog. Can also set up MOBIUS catalog as a separate view with the enhanced searching/display features.	Can provide pass-through search link to INN-Reach catalog. III has not developed an Encore system to overlay INN-Reach.	May be able to provide pass-through link to INN-Reach catalog. Can also set up MOBIUS catalog as a separate view with the enhanced searching/display features.
Customization Options	AquaBrowser allows a great deal of customization in terms of general display, facets to include, etc.	III has allowed very little customization to this point.	Primo allows a great deal of customization in terms of general display, facets to include, etc.

Note: Much of the comparison is done based on comparing the implementations at CSU Fresno (Encore) and University of Chicago (AquaBrowser). Information on Primo was obtained from the vendor at ALA as well as reviewing implementations at Iowa State and Boston College.