“Making the Most of WorldCat Discovery” with Jen Johnson, Senior Implementation Manager, johnje@oclc.org

There are three major areas of focus in OCLC right now: Innovation (Search Engine), End User Journeys (Great UX), Foundational (WorldCat Local Features)

The OCLC Community Center is a great place to discuss OCLC products with other users, request enhancements or make recommendations for the Discovery tool, to find online training and FAQs, or to view upcoming releases and planned enhancements.

- This month’s release includes some new databases and an option to search libraries world-wide if your search yields no results (For example, if your search for “Harry Potter and the Philosopher’s Stone” in a Tulsa Community College Library-centric search yields no results, Discovery will offer to tweak the search to search libraries world-wide for you).

- OCLC also publishes their “Road Map,” which is a list of future enhancements planned during the fiscal year. The current road map projects enhancements to June 2017. Some of these long-term enhancement plans include an updated search algorithm, updated and improved citation styles, cover art images on all records (no more blank record photos), more accurate e-resource links, more intuitive course reserve interface, temporary course reserve items, continued work on search relevance, spelling suggestions (currently based off of American English), more detailed information in emailed records, and abstract and summary improvement for better search relevancy.

One of the feedback features mentioned during the training included a “Send Feedback” button that pops up on the lower right hand side of an executed Discovery search (see screenshot below). Library users and employees alike can use this tool if the search results look unusual or abnormal. Library user feedback will be directed back to the library for research help. Employee feedback will be ticketed and sent to OCLC support, and you can include your contact information in this form if you would like OCLC to follow up with you regarding your feedback.
OCLC is continually tweaking their search algorithm to improve search relevancy, and the latest tweak aims to feature more recent publications at the top of a search, increases emphasis on title and author, and decreases emphasis on worldwide holdings (as of August 2016).

**WorldCat Discovery Structure and Relationship to Knowledge Base**

*Jen provided some great diagrams of how the databases in WorldCat interact and the anatomy of a search, as well as some handouts regarding how Discovery determines relevancy and builds a list of possibly-relevant records. Jen is sending these materials to Bob to pass along to Andy and I will update this handout with screenshots when they are available.*

Regarding citations, Discovery builds all their auto-citations from the metadata associated with books and articles. Databases not run by OCLC are not required to provide much metadata at all, much less standardized metadata, hence why some citations are near-perfect and others are messy.

One issue brought up during this training was broken or unreliable links to articles via the “Access Online” button to the right of an article that is available to read online. Discovery accesses the article from the top of a list of access points, so if your link is not working or if it takes you to the landing page of a publisher’s website, simply click into the specific record that you would like to access and scroll down to the “Access Full Text Online” section to find a different database (see images below). We are having this issue with Gale at present where their “Access Online” button takes you to the landing
What Do Users Want? Findings from OCLC Research

OCLC has a research division to understand user cognition in regards to how OCLC products are used.

A recent study found that research behaviors differ by discipline, there is a heightened emphasis on e-journals, speed and convenience are king, there is a drive for enhanced functionality and content for evaluation, users are confident in their ability to use tools
but there is little improvement in information literacy, and digital content is better. The implications for this study are that OCLC and libraries are serving different constituencies, we need to provide seamless access, we need to consider a greater variety of digital formats and content, we need to be prepared for changing user behaviors, we need systems to look and function like search engines and web services, we need high quality metadata to aid discovery, and we need to advertise the library brand, resources, and value in our community.

WorldCat Discovery Refresher

- A basic search (the search you make on the library.tulsacc.edu webpage or at the top of the Discovery search page) is automatically a keyword search, so it does not search titles, authors, subjects, et cetera unless you tweak these settings in an Advanced Search or use an index code.
- OCLC has a list of index codes to help you expertly refine your searches. You can access the complete list of index codes here: http://www.oclc.org/support/help/SearchingWorldCatIndexes/ or a quick reference version here: https://www.oclc.org/content/dam/support/worldshare-metadata/Searching%20WorldCat.pdf. As a reminder, index codes are like shortcut codes that tell Discovery to search titles, authors, et cetera for your word or phrase. For example: ti:children will search for the word “children” in titles and you can execute this command in the basic search bar for speed. However, the Advanced Search will also write these indexes for you if you are not comfortable with them or if you cannot remember them.
- OCLC also offers a search tool called “FirstSearch,” which is similar to Discovery, but is really more navigable for librarians than for library users. Here is a document comparing and contrasting the two services: https://www.oclc.org/content/dam/oclc/worldcat-discovery/WCD-FirstSearch-FAQs.pdf. Jen is going to forward our institution’s access information for FirstSearch to Bob, who will pass it along if you are interested. FirstSearch can be accessed at FirstSearch.OCLC.org.
- Regarding relevancy-only searches, Discovery will prioritize items available through TCC first on this list, but the main focus of this search is relevancy, not availability to TCC users.
- A head’s up that if you decide to execute a “relevance only” search in Discovery and then select “Tulsa Community College” as the library where the relevance search is focused on, you may bury books in your search results (for example, if you search for “cyberbullying,” sort your results by “relevance only,” and then select “Tulsa Community College” as your library on the left hand search filters, we do have books on this topic, but the many articles pertaining to this topic may push possible book returns lower in the search results). You can check for books
by selecting “book” under the Format filter on the left hand side of the search page after executing a search in this manner if you would like to see our print holding options for a topic.

- Regarding saving articles in Discovery, you can save articles by clicking on the little star icon next to a record (see images below), and access saved records by clicking on the “My List” link at the top right hand side in Discovery. Remember that your saved articles are temporary during your session and they will be automatically erased after approximately thirty minutes. Records saved to your list can be exported as a whole, printed out, et cetera.

**Basic Versus Expert Searching**

Basic Search: By default, a basic search is a keyword search. To execute a basic search, simply enter a search term and hit the search button or enter.

Expert Search: An expert search contains index labels and Boolean phrases and can be entered into any search box in Discovery, including the Advanced Search box.
WorldCat Discovery Scenarios/Questions

- A search with many results can be narrowed down to find articles using the filters on the left-hand side of the search page and by clicking on “Articles” under the “Format” section heading. You can separate general from peer-reviewed articles by clicking on “Peer Reviewed” under the “Content” section heading.
- Basic searches only search TCC’s default eighteen databases linked to Discovery. You can search all thirty-eight linked databases via the Advanced Search page.

Using the Discovery Bar Versus Individual Databases

- Discovery hides some awesome individual databases features and can be a little cumbersome to use. Additionally, classes lean towards using articles instead of books, so it is important to find topic-specific articles, which is where individual databases come in handy.
- Discovery is a little more complicated than it appears; it is Google-like in that it gives you Google-like results, which can be good or bad.
- Discovery can be a good starting point since it is something of a survey tool. Discovery gives you a small overview of what is out there and can help students zero in on a topic before selecting a specific database to finish up their research. Adam used the analogy that Discovery is like standing on a hill and using a pair of binoculars to quickly look at surrounding hills before deciding which hill you want to walk towards.
- Discovery may be appropriate to incorporate into LibGuides, use in consultation sessions, and to recommend in embedded librarianship situations.
- Discovery is a good starting point, but it is totally okay to go straight to the database that you know is appropriate for the research at hand or the database that contains the article that you are looking for.

Incorporating Discovery

- During instruction, you may consider beginning with Discovery as a research tool before discussing individual databases, or you may consider introducing some key databases before presenting Discovery.

Final Thoughts

- If you have a Discovery problem or question, you can contact OCLC support at support@OCLC.org or 1-800-484-5800. Your question/problem/request will be ticked and queued if you contact OCLC through this number or email address.