Duke University Libraries conducted an extensive review of discovery service products during 2010 and presented Summon on the library site as an articles search in March 2011. The current group is charged with reviewing the market for discovery service products as the market has changed in the intervening three years and based on interest in alternatives among library staff. The time for annual contract renewal is in January and WebX wants to begin evaluation well before the renewal date to allow time for any change.

The current investigation includes the following steps:

- Establishing criteria for product evaluation
- Comparing content coverage of Summon and competitors
- Reviewing published reports of comparison of discovery products
- Talking with library clients of Summon competitors

Based on our investigation, Summon and Ebsco Discovery Service (EDS) are viable options for this tool. EDS clients are generally pleased with the tool, but its utility somewhat relies on a large share of Ebsco subscriptions. Content coverage and published research comparing the two tools is inconclusive. Given the breadth of DUL content and the cost of staff time to make a switch to EDS, the group recommends continuing our Summon license. WebX will continue to evaluate Summon and its new display (Summon 2.0) and could revisit this recommendation based on user response to Summon 2.0.

Product evaluation criteria

- Ability to provide a single index of diverse format types including books, articles, library guides, digital collections items, institutional repository items, etc.
- Coverage of materials owned and/or licensed by DUL
- Search result speed
- Searching interface usability
- Technical services implementation and maintenance staff time requirements
- Vendor reputation for customer service and responsiveness

While we considered Primo, WorldCat Local (WCL) and Google Scholar, they did not meet basic needs for our single-search product. Primo, WCL and Google Scholar would all have difficulty indexing the variety and breadth of content that Summon or EDS could provide. At this time, Ebsco Discovery Service and Summon are the only viable options for DUL.

For more information, please contact emily.daly@duke.edu
Content coverage

Content comparison is very difficult for EDS generally and also between EDS and Summon. EDS does not publicly list all of its content partners as Summon does. Also, EDS indexes content by database whereas Summon indexes by publisher and journal title. Without lengthy analysis by library staff or the vendors, it would be difficult to establish relative content coverage.

Publication review

Comparison of Article Search APIs via Blinded Experiment and Developer Review, code4lib April 2013. http://journal.code4lib.org/articles/7738
- Johns Hopkins users were asked to select the service that provided the most relevant results
- “In summary, the study, largely, did not show significant preferences between products.”
- “Using [this analysis], the only pairings that achieve statistical significance are:
  - A preference for EDS over Scopus
  - A preference for Summon over Scopus”
  - Primo lost to every product it was paired with, although by fairly small not statistically significant margins.
  - Summon won, but by a small and not statistically significant margin, against every product it was matched against — except EDS, where it was an exact tie (14 vs. 14 with 7 ties).
  - EDS has very mixed success — it beats Scopus with statistical significance, but Primo only by a very slim non-significant margin (16 to 14 with 8 ties); ties with Summon; and is beat by EBSCO ‘traditional’.”

Paths of Discovery: Comparing the Search effectiveness of EBSCO Discovery Service, Summon, Google Scholar, and Conventional Library Resources C&RL pre-print http://crl.acrl.org/content/early/2012/05/07/crl-374.full.pdf+html
- Concludes that EDS has the highest quality results
- Limitations of the study based on different schools (students, collections)
- Article suggests that Summon’s quality suffered because of high proportion of newspapers ranked highly; Duke’s scoped search helps to solve this issue

EDS client feedback

UNC-Greensboro (former EDS and current WCL client)
“We considered Summon because it was first out of the gate for discovery tools, but EDS caught up fast. One of the big reasons we went with EDS was because we have so many Ebsco databases and EDS of course works much better with them. Also users didn't have to click so many times to get to the full text.”
“EDS definitely improved over time. We were Beta testers with them and I think they improved how they pulled in information from our Sirsi catalog over time.”
“I didn't have half as many complaints about EDS as I do now with WCL.”
 “[Ebsco was] very responsive and worked well to make our product better.”
“If you have Serials Solutions as your A to Z then EDS might not work as well.”
NC Live
“For us, it was a fairly practical/$ decision since most all our content comes through EBSCO. We were also able to negotiate a really great deal because of all the content we purchase from EBSCO.”
“Summon was out of our price range.”
“I think if we had more of a mix of content then we would have done a more complete evaluation of the other providers again this year.”

Johns Hopkins Excelsior College
“I do feel like they are very responsive to support requests.”
“Our users love it.”
“We also looked at Summon at the time, but we felt like our users were already so familiar with the Ebsco interface (we are a smaller library and many of our databases are some ebsco) so it was a very smooth transition for us. The interface is very intuitive and clean and easy, which is why we really like it.”
“One negative is that we are noticing a lot of foreign language results on the top of the results list. Not good. I will do a search on like, homeless and HIV and the first result will be in Turkish.”
“We have noticed improvements over time. I just attended a webinar where they outlined some interface changes coming in the next few months as a result of extensive usability testing that they’ve done, so I’m excited to see those changes.”

WorldCat Local feedback
UNC-Greensboro
“We went with WCL because it came with WMS [another OCLC service] so we could save the cost of EDS.”
“If you have Summon and are happy with it stay with Summon. WCL has many problems that [my colleague] mentioned.”
“[One issue] is that if you have a new edition of an ebook and do a search for it you get an old version, then you have to click on Editions and Formats to get to the new version.”
“I think some of our issues with World Cat Local are specific to us--we've just made the change from Sirsi to WMS and some of our librarians and faculty are finding it a difficult transition.”
“Our default WorldCat search is limited to Academic Search Complete, ArticleFirst, Business Source Complete, General OneFile, Literary Reference Center Plus, Political Science Complete and WorldCat. I don't have a good sense of how frequently users are going into Advanced Search to select additional databases.”

Primo client feedback
University of Oklahoma Libraries
- Librarians noted that they opted to move from EDS to Priomo so they would not lose content from EBSCO or Proquest (they worry that EDS preferences EBSCO content, while Summon preferences Proquest content).
- They’ve also heard from Primo that Ex Libris is committed to getting content that is not available through EDS or Summon due to their provider partnerships.
- They also explored WorldCat Local and heard that customer service is strongest with WCL but that the product is “just not where it needs to be.”