

TRLN HIGHLIGHTS: FACETED BROWSING

TRLN has purchased the Endeca Information Access Platform for Libraries to create a single search interface across the online catalogs of all four TRLN institutions. Endeca will not replace any of the existing campus ILS platforms which, unlike Endeca, also power the administrative functions of acquisitions and circulation. The new system will index the combined catalog records of Duke University Libraries, North Carolina Central University Libraries, North Carolina State University Libraries and the University of North Carolina, Chapel Hill Libraries. This powerful new search engine will improve upon traditional keyword searching by adding faceted browse to more fully expose and exploit the rich metadata in our online catalogs. In time, the Endeca implementation will enable TRLN to facilitate new collaborative services to its patrons.

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Digital TRLN Initiative: Search TRLN

WHAT IS FACETED BROWSING?

Faceted browsing, alternately called faceted navigation or guided navigation, combines search and browse in a single interface – enhancing the information retrieval experience by improving upon both. Faceted browsing is familiar to web shoppers, who search for products on commercial web sites and find their results grouped by categories -- or facets – such as price range. In a faceted browse environment, the results shown are typically enumerated – for example, \$10 - \$20 (40) -- and are valid for that particular search. Facets are revealed only if there are results returned, so the user can immediately see how the results are distributed and will not encounter a dead-end while browsing. With faceted browse, the “user can see exactly the options they have available at any time. They can switch easily between searching and browsing, using their own terminology for search while recognizing the organization and vocabulary of the data.”¹

In January 2006, the NCSU Libraries was the first to bring this popular e-commerce solution to libraries. Facets for catalog records at NCSU include “availability, author, library, format, language, LC Classification, Subject: Topic, Subject: Genre, Subject; Region, and Subject: Era.”² By breaking catalog metadata (such as subject headings) into facets, many more paths to a particular bibliographic record are made possible. Users can select the facets they want to combine, in the order of their choosing, instead of relying on a keyword search as a possible segue to the desired subject heading.

In a library catalog, the use of facets will allow searchers to view results of a keyword search in the context of additional information – principally, classification schemes such as LC or NLM. Endeca not only has relevance ranking, but the software allows the relevance ranking algorithm to be tweaked on the backend, resulting in a superior ordering of results. So even if the user chooses *not* to use faceted navigation to filter his or her results, Endeca’s default ranking of those results is superior to traditional ILS platforms. Used in combination, faceted navigation and superior relevance ranking leads to much more satisfying results for the patron.

¹ Searchtools.com Background Topics: Faceted Metadata Search and Browse, <http://www.searchtools.com/info/faceted-metadata.html>

² [A Faceted Interface to the Library Catalog](#), Tito Sierra, *ALA Midwinter Meeting*, January 20, 2007.

LOCAL BACKGROUND AND TIMELINE

1984: TRLN pioneers the earliest implementation of a consortial online catalog, BIS. The (then) three TRLN institutions maintain their own separate databases which function as a distributed network. Bibliographic records are not merged but results sets are combined and de-duplicated.

1989: TRLN decides to migrate to a commercial product and cease local development of BIS.

1991-92: TRLN purchases DRA and member institutions agree to maintain separate implementations with similar functionality to ensure similarity in search results from each catalog. A central steering committee works with campus contacts to ensure this consistency.

2002: When DRA merges with SIRSI, TRLN reconsiders options for a future integrated library system. An ILS Transition Committee is formed and submits its report to the Council of Directors. The Council determines that each TRLN institution will pursue its own integrated library solution. It is no longer easy for patrons to search all TRLN catalogs together.

2002: The Council of Directors endorses "TRLN Statement of Principle on ILS Implementations," which states that in the new environment of separate ILS vendors, TRLN will "maintain the current level of services and system interoperability and seek ways to leverage the capabilities of these new systems to improve and expand services to the Research Triangle teaching and learning communities."

2006: TRLN Planning Committee approves "Digital TRLN" planning document which includes a commitment to a "Search TRLN," looking specifically at Endeca as a solution. The ability to capitalize on NCSU's expertise and prior development is a factor in this decision, as is general confidence in the Endeca platform.

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- TRLN posts vacancy announcement for [Endeca Implementation Librarian](#)
- Software is purchased

NEXT STEPS: A steering committee will be formed to oversee the implementation. Working closely with campus-based groups, implementation tasks will include determining search indexes, relevance ranking, facets, methods of virtual de-duplication, and the exporting of MARC data from each ILS. The steering committee will also oversee groups charged with designing the new user interface, as well as integrating new and existing services.

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Endeca at the NCSU Libraries: Presentations with Slides

<http://www.lib.ncsu.edu/endeca/presentations.html>

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FUTURE COLLABORATION: OPPORTUNITIES FOR INNOVATIVE SERVICES

Direct borrowing by users
Recommender services

* Contact information revised June 14, 2007