

3-1-2011

Discovering Choices: The Web Scale Discovery Marketplace

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STARS Citation

Hoepfner, Athena, "Discovering Choices: The Web Scale Discovery Marketplace" (2011). *Faculty Scholarship and Creative Works*. 832.

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Electronic Resources & Libraries 2011

Austin, TX, Feb 28- Mar 2

Discovering Choices

The Web Scale Discovery Marketplace

Athena Hoepfner, UCF Libraries

Who am I and why am I here?



Marshal Breeding

Library technology guides: Key resources in library automation. 1994-

Athena Floeppner

University of Central Florida
Libraries



Jason Vaughan

Electronic Resources Librarian

Web Scale Discovery. *Library Technology Reports*. 2011, 47, no. 1 (01).



NCSU

athena@ucf.edu

Google: [cybrgrl](https://www.google.com/search?q=cybrgrl)

Early adopter and innovator of many library technologies.

ATM: [athenaucflibrary](https://athenaucflibrary.org/)

Presentation Overview

- Introduction to Web Scale Discovery
- Delving into the Central Index
- WSD end-user walkthrough
- Technical and back-end options
- Pricing models
- What WSD may mean for the future

A mid-day conversation...

(2:09:30 PM) Athena: Working on my presentation... very very early stages of organizing info about Web Scale Discovery vendors.

(2:10:03 PM) Brendan:
web scale discovery?

(2:12:56 PM) Athena: yeah. That is what we librarians are calling the latest tool for research. It is a unified index of our library catalog and metadata from publishers and databases.

it lets a user enter a single search that will potentially discover any resource the library has to offer.

(2:13:47 PM) Athena: "a unified, customized index of an institution's information resources, and an easy, yet powerful means of accessing all of that content from a single search box. "pre-indexed service of unprecedented size and speed"

(2:18:25 PM) Athena: I think that users won't even notice if we implement Web Scale Discovery. I think it is exactly what they expect.

(2:16:18 PM) Athena: Here is one example. Oklahoma State University's implementation
<http://www.library.okstate.edu/>

Brendan: surprised you don't have that setup already

What is Web Scale Discovery?

- Pre-harvested central index of metadata
- Single search box for combined searching of licensed, open, and local collections
- Single results list for all collections
- Relevancy ranking across entire results
- Full featured user interface
 - Facets and tools for narrowing results
 - Holdings and status info for catalog items
 - Connections to full text

Who are the WSD Vendors?

Summon	WorldCat Local	EBSCO Discovery Service	Primo	End Sync	TDOne
Serials Solutions	OCLC	EBSCO		Innov	TDnet
http://www .serialsolutions .com/summon	http://www .oclc.org /worldcatlocal	http://www. ebscohost.com /discovery	http://www. exlibris /Primo	http://www. innovative .com	http://w ww.tdnet .com

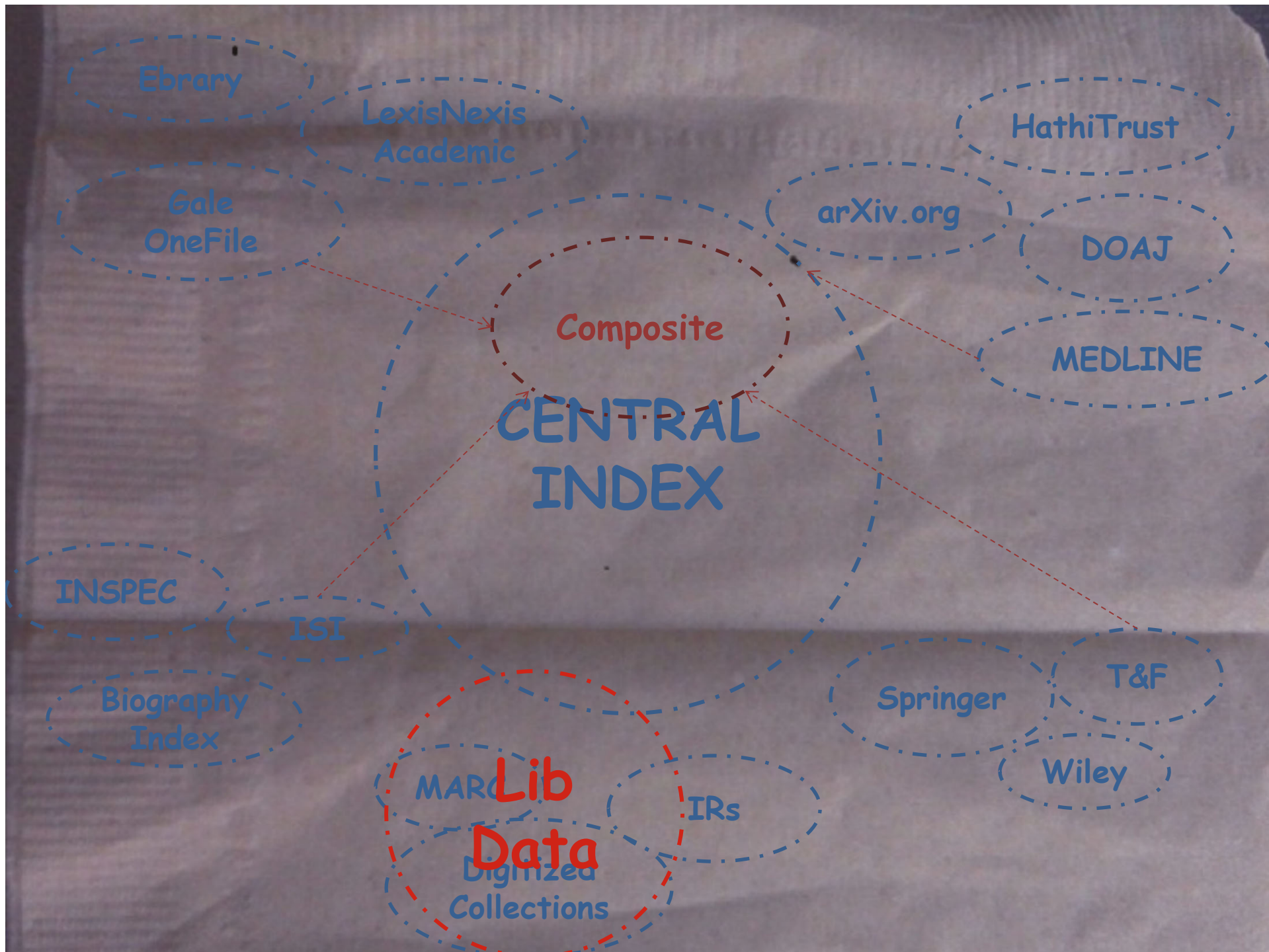
WSD Vendors I Talked To

Summon	WorldCat Local	EBSCO Discovery Service	Primo Central Index
Serials Solutions	OCLC	EBSCO	ExLibris
Andrew Nagy	Mindy Pozenel	Brian Duncan, Kathleen McEvoy	Christopher Spalding Jorgen Madsen
Andrew.Nagy@ serialssolutions.com	pozenelm@ oclc.org	BDuncan@ ebSCOhost.com; KMcEvoy@ ebSCOhost.com	christopher.spalding@ exlibrisgroup.com; jorgen.Madsen@ exlibrisgroup.com



Size, Content, Fruit

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
All items	10,000,000	750,000,000	250,000,000	
Article records	10,000,000	449,000,000		
Books (titles or chapters)	10,000,000	182,400,000		
OAIster, HathiTrust	10,000,000	36,732,959		
eBook (titles or chapters)	20,000,000		300,000	
IR records	9,200,000	1031		
Theses & Dissertations	5,900,000	1,000		
Proceedings	3,000,000	8,163,158		
Journal titles	100,000	68,946	100,000	



Records

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Can display original records		y	Y	Y
Composite or Clustered	Composite Match and merge duplicate records to create a "summon record"	Clusters Based on records the library can access and the user can see which databases provided records and see the original record.	Clustered AND Composite EDS de-duplicates results. EBSCO only merges data from EBSCO owned content.	Clusters Find the entire group for any query words in the group.
Record Displayed (composite, vendor, other)	Summon record displayed	Most robust/full information.	Most detailed record .	Publisher is primary, others are viewable.

Review

WSD offers a pre-harvested
central index of metadata (+
full text) from:

- Library local collections,
- openly available collections, and
- licensed collections...

Who is using WSD?

Summon	WorldCat Local	EBSCO Discovery	Primo Central
<u>200+</u>	1419 ?	300+	200
<u>Oregon State University</u>	<u>University of Washington</u>	<u>University of Georgia</u>	<u>University of Iowa</u>
<u>University of Michigan</u>	<u>McGill University</u>	<u>Deakin University</u>	<u>University of Manchester</u>
<u>North Carolina State University</u>	<u>Cornell University</u>	<u>University of North Carolina at Greensboro</u>	<u>Northwestern University</u>



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Books

Articles

Journals

Digital

Search
here :

Keywords, titles, authors...

Go

Chat

Standard Branding Options

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Logo	y	y	y	y
Colors	y	y	y	y
Banner/links	y	y	y	y

Standard Interface Options

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Embeddable search form	y	y	y	y
Interface language	y ##	y ##	y ##	Y ##
Layout	y	y	y	y
Mobile interface	y	y	y	y
Admin Module Controls	y	y	y	y

Notable Interface Options

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Customized initial search		Can control which databases are searched, can create 3 library groupings in addition to world-wide.	Can set basic or advanced. Can create subject profiles	Can set basic or advanced and use API for more options.
Mobile customizable		y		Customizable through CSS
API	y	n		y. Customers share developments.



YU Library | Ask | Reserves | ILL | Your Account

Search :

Venture

Go

700,000 hits

Relevancy

Dates

1859 < - > 2011

Type

- ☐ Journal
☐ Book
☐ Electronic
...more

Subject

- ☐ Capital
☐ Expeditions
☐ Brothers
...more

Library

- ☐ Main
☐ CoM

n

How venture capital works:

Author: Christian Science Monitor
(1908-Current file) ISSN: 0145-
8027 Date: 03/11/1985 Description:
17

Full Text

b

The Venture cloning method

Author: -Thadius S. Venture
ISBN: 01-0045-802 Date: 2008

Sci Library
QH 442 V7 2008

Due:
Yesterday!!

Relevancy

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Relevancy customizability				Y
Relevancy ranking metrics	Static - data, scholarly, and other metadata. Dynamic rank - user input: term frequency, proximity, field.	Proximity of search terms, title/author/field -	Titles (for known items), Abstract over Full text, Peer reviewed, Currency, Length of article, weight re	Currency of data, frequency of term, weights for authors, es
Bump Local Up		Y - library can bump the weight for their collection		or prominence of local collection

Facets/Filters

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Facets	5 main facets. Content type, Subject terms, Pub Date , Lib Location, Language). Extra facets for book (Author, genre, geographical region, time period).	Databases, Format, Author, Year, Language, Content, Audience, Topic	Large number of potential facets. Depends on results set.	Customizable
Filter to local collections	Y Automatically shows just library subscribed	Y 3 customizable groups (i.e. local, regional, peers) and the worldwide	Y	Y

Guest User Access

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Guest users sees....	Almost everything. Guest users will not see unique data form A&I providers.	All records that are not restricted (all Gale, WorldCat)	Guest access is provided for searching and to display any catalog records.	Library decides if guest access is allowed. Authenticate to access full text and to see WoS data.

Enrichments and User Features

- Enrichments – book jackets, times cited, JCR, licensed ratings and reviews
- User ratings ,reviews, Like, tags, tag clouds
- User folders/lists (shared and private)
- Saved searches, Alerts/RSS

Enrichment

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Cover art, TOCs, etc (i.e. Syndetics or included)	Y	Y	Y	
Sources (i.e. Ulrich's, JCR, WoS)	Ulrich's, (scholarly, discipline) Crossref (DOI), WoS (times cited)	Multiple deals with enrichment sources. No JCR	Multiple deals with enrichment sources.	
LibGuides	Y	N	Y	
Recommenders	Database recommender based on search.	Can see that an item is on lists	Optional EHIS. Suggests alternate search terms	BxRecommender

User Features

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Alerts/RSS	Y		Y	Y
Export Citations	Y			Y
Formatted citation display	Y		Y	N
Persistent folders	N		Y	Y
Shared folders				
Personal interface controls	N			Y
Ratings	N		Widget	Y
Reviews	N	optionally public	Widget.	Y
User tagging	N	y - optionally public	Widget	Y

**AMAZING
!!!**

Review

WSD offers a pre-harvested central index of metadata (+ full text) from:

- Library local collections,
- openly available collections, and
- licensed collections...

...coupled with richly featured, powerful,
yet intuitive user-interface.

Major steps to set up

- Entire MARC batch load
- Set up interoperability with ILS, Circ/ILL/etc.
- Sync with knowledgebase of OpenURL,
- Identify databases to be searchable in central index
- Set up proxy/authentication
- Establish IP range,
- Customizations and branding.

Technical/Back-end

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Typical time to production	6 weeks. Starts as soon as a library is ready.	30 to 90 days - dependent upon the institution providing ILS data. From Quick Start to local is very fast - 1 week or so.	4-6 weeks	
Admin Module	Logo, order of the facets, interface language, feedback email address, other? MARC Mapping, etc.	Admin controls interoperability, KB, branding, links, etc. Unmediated.	EBSCOadmin is the administrative module for EDS.	Logo, colors, layout, custom links, interface language.

ILS Features Integration

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Holdings	Indexed	Y - holdings are loaded into WorldCat	y - real time call.	Y - either integrated or linked
ILL	Link Resolver	Y - ILLIAD. otherwise OpenURL 1.0	Y	Y - either integrated or linked
ILS Authentication Available	N	Y	Y	Y
ILS User Accounts	N	Links into native ILS	Y	Y - either integrated or linked
Item status	Real time call	Real time call	Real time call	Real time call

Related Products

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Hosted or Local	Hosted. No option for local.	Hosted. No option for local.	Hosted. No option for local.	Hosted and Local options available for Primo.

Pricing

Feature	Summon	WorldCat Local	EBSCO Discovery	Primo Central
Pricing model	FTE and Carnegie class	FTE	FTE	FTE and number of local documents . Hosted v local Discovery.
Consortial pricing avail	Y	Y	Y	Y
Multi year avail	Y	Y	Y	3 years/ then renewable normal
Number/size of local collections	N	N	N. EHIS- Y	Y
Implementation fee		Y	N	Y.



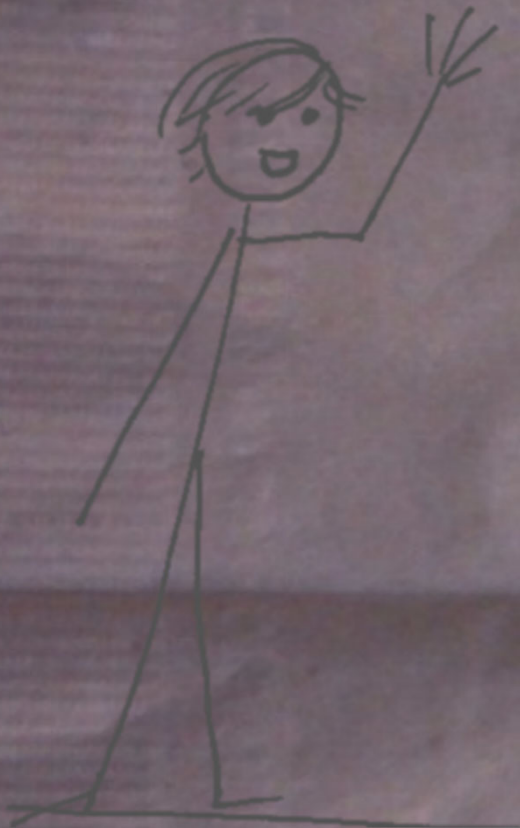
Clear as mud?

Open discussion and demos...



Where does it all lead to?

What will WSD will mean for libraries, user, and publishers (both A/I and full text)?



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