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50 East Huron Street, Chicago, Illinois 60611-2795, USA

EBSCO Sets Strategy for Discovery

In the rapidly moving world of discovery products, EBSCO Publishing has developed a series of products and partnerships that make it a strong competitor. A longstanding provider of aggregated article databases and other information products, EBSCO has extended its strategic product suite into the arena of broader discovery services. In recent months, the company has announced a number of partnerships for content and extensions to its technology platform related to this new suite of products and services.

The EBSCOhost Platform

EBSCO Publishing's primary business activity is the production of database products offered under the EBSCOhost platform. Over the years, the company has steadily expanded the number of databases it offers and has continually worked to ensure that the technologies used to deliver the database have evolved to meet changing customer needs. The current EBSCOhost platform represents the latest generation of the technology that aggregates, indexes, and delivers these information products. EBSCO currently offers over 350 research databases.

One example of the recent enhancements to the EBSCOhost platform is the incorporation of more sophisticated handling of scientific formulas. This new capability, announced in June 2009, allows users to enter queries involving formulas using natural language, and extends the database architecture to allow article titles, abstracts, and other fields to include scientific formulas. This feature, initially delivered in Inspec, will be valuable for the wide array of STM products delivered through EBSCOhost.

In recent years, libraries have become interested in discovery methods that provide more modern interfaces and that access the totality of their collections, spanning both print and electronic resources. EBSCO's products often form a large subset of a library's electronic resources, but the EBSCOhost platform has not previously been positioned as the tool for providing access to other sources of content. As EBSCO enters the discovery interface arena, they leverage their core business and technology assets to deliver access to all aspects of library collections, extending beyond their own information products. Toward this end, the company has now developed new capabilities in the EBSCOhost platform, and has formed partnerships with other content providers and technology companies. These new products allow users to engage with a wide variety of content resources through the consistent interface of the EBSCOhost platform.

EBSCOhost Integrated Search

EBSCO's first foray into expanded discovery involves extending the reach of EBSCOhost through integrated federated search. The basic EBSCOhost provides access to the

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databases and content products available to the library through paid subscriptions from EBSCO. Through federated search, the EBSCOhost platform can be configured to deliver the user's query to other information resources and present the results, eliminating the need for users to traverse multiple interfaces as they perform their research.

This technique, known as metasearch, is subject to various technical challenges. Since it depends on real-time responses from the remote targets, it can be difficult to present results quickly and to retrieve large numbers of items. EBSCO addressed this issue through a multi-tiered approach, where the highest priority and fastest-responding targets channel into an initial result set presented to the users while the system accumulates results from a secondary level of targets. The library's system administrator can configure the resources associated with each discipline and select priority levels. This tiered approach delivers results from native EBSCOhost resources instantly, since their indexes reside on the company's own servers, followed by top-tier external resources and supplemented by results secondary groups of resources.

EBSCO Discovery Service

In parallel to the development of EBSCO-host Integrated Search, the company is building a more sophisticated offering called EBSCO Discovery Service, based on comprehensive harvesting of external content that can be indexed on the company's own servers to deliver search results instantly. This approach falls well within the current trend for discovery services based on pre-populated indexes of harvested content instead of metasearch technologies. Summon from Serials Solution, Primo Central from Ex Libris and WorldCat Local also follow this general approach, each with distinctive characteristics.

EBSCO Discovery Service takes advantage of the EBSCOhost platform to deliver a consistent interface for indexing, search, and retrieval technologies. It brings a wide range of electronic resources beyond the company's own databases and research resources through arrangements with a variety of partners into the platform.

One of the goals of this genre of discovery products is access to print and electronic collection components. To deliver access to a library's print collection, EBSCO has created partnerships with OCLC and with ILS vendors.

A key component of EBSCO Discovery Service includes harvesting and synchronizing metadata from the library's ILS. The technique of using protocols such as OAI-PMH to systematically harvest MARC records from an ILS and to use item-specific deep linking and APIs to present current circulation status and availability of items through has become well established in the genre of discovery interfaces. EBSCO Discovery Service follows this approach to address the resource managed within the ILS.

In July 2009, EBSCO and Ex Libris announced a partnership to provide access to content managed within ALEPH and Voyager integrated library systems through the EBSCOhost interface. The integration between these products is made possible through the APIs that Ex Libris offers for harvesting, real-time status and other features relevant to the connection of an ILS to a discov-

ery product. This arrangement leverages Ex Libris' expertise in delivering content from its own products and competing ILS products to a discovery interface. In a complementary arrangement, EBSCO will provide Ex Libris content from selected EBSCOhost databases to help populate Primo Central, a repository of pre-indexed content available to libraries that use the Primo discovery interface.

EBSCO also brings assets that can be used for the enrichment of print content within an online catalog or discovery interface. In May 2009, the company announced NoveList Select as a feature that can be added to make recommendations to users for future reading selections based on material in the library's collection.

The EBSCO Discovery Service will have the capability to harvest and link to content housed in other repositories, such as institutional repositories and multimedia collections.

The content harvested from the ILS and local repositories will be incorporated into a customized view of the indexes created for each library. As multiple libraries participate in the EBSCO Discovery Service, each views only the content relevant to their own profile, including subscribed electronic resources, ILS and local repositories.

In addition to metadata regarding the library's print collection directly from the ILS, EBSCO Discovery Service will include a representation of 130 million records from WorldCat.org through a partnership with OCLC. These records provide discovery capabilities for print materials beyond the library's local collection. The WorldCat.org records will be harvested and indexed within the EBSCOhost platform, independent of OCLC's own facilities. This partnership also involves providing OCLC with metadata from EBSCOhost databases to add to the article content that will be part of WorldCat Local.

In order to comprehensively address the library's electronic collections, EBSCO Discovery Service will incorporate collections of article content from providers beyond what's available through the company's own EBSCOhost databases. EBSCO has created partnerships with a growing roster of publishers which have agreed to make their content available to be indexed in the EBSCO Discovery Service. Users of the service will link to the content on the publisher's site when they select an item to view. Some of the content providers cooperating with EBSCO in this way include Readex, Alexander Street Press, NewsBank, and LexisNexis.

At this point, not all publishers are willing to make their content available for indexing in discovery products. To provide access to resources not yet available for advance harvesting and indexing, libraries can layer in EBSCOhost Integrated Search.

EBSCO Discovery Service can be customized to convey the identity of the library, presenting the library's logo instead of EBSCO's. The library can specify color schemes, layout, and other user interface elements. Functionality from EBSCOhost, such as a search box, a-z lists, and journal home pages detailing volumes and issues can be delivered on any Web resource through a suite of gadgets that the company is currently developing.

Product Positioning

EBSCOhost Integrated Search and EBSCO Discovery Service follow different approaches as discovery tools. EBSCOhost Integrated Search, based on metasearch, takes a less complex approach and will help libraries offer a broader discovery environment at a modest cost. EBSCO Discovery Service takes a much more sophisticated approach, appealing to libraries in need of a comprehensive search environment that brings together

a library's print and electronic collection components.

The initial version of EBSCOhost Integrated Search was released in June 2009. The EBSCO Discovery Service continues development and customer testing, with general availability expected by year-end 2009. Pricing has not yet been established.

With the entry of EBSCO Discovery Service, the competitive market for discovery products based on pre-populated indexes of harvested content intensifies. It joins Summon from Serials Solutions, already in production in early adopting libraries, Primo Central, with expected year-end availability, and the ever evolving WorldCat Local. We are in the very early days of this new product model. This genre of product aims to deliver a discovery environment for library content that provides access to books, articles, digital resources, and other aspects of library collections through a single search, presented through an interface that library users will understand and easily navigate. As each of these products completes development and finds use in libraries, each will have the opportunity to demonstrate its ability to deliver on this incredibly ambitious vision. Libraries will benefit from the success of these products if they prove capable of delivering high-quality, selected and vetted library content using tools and technologies consistent with the broader Web.

—*Marshall Breeding*

Battle of the E-Books

The battle for the future of the growing U.S. e-book market and of e-reading in general continues to heat up, with new combatants, new weapons of mass e-reading, and slashing of prices for both the devices and the content.

Amazon's Kindle has kindled all these developments and tussles, because it has shown that there may be a sizable market for e-books in the U.S. after all. Amazon claims that 30 percent of sales of titles for which a Kindle edition exists are indeed for those Kindle editions. A recent survey by the NPD Group, reported in InformationWeek and elsewhere, found that 37 percent of U.S. adults are somewhat or very interested in owning an e-reading device, while over 40 percent said they were either somewhat uninterested or not interested at all in owning such a device. This could engender many glass-half-full versus glass-half-empty arguments, but we should remember that, according to the ongoing NEA study of American reading habits, almost half of the adult U.S. population rarely reads anything that would remotely qualify as a book, regardless of the medium, print or electronic.

In late July, Barnes & Noble announced a deal with Plastic Logic to create a new service and device that they hope will be a Kindle killer. The e-reader device from Plastic Logic, a UK-based company, is rumored to be 8.5 by 11 inches, ultra thin and light, with a touch screen. It seems to be designed primarily for business and educational reading, not recreational reading. It's more of a competitor with the supersized Kindle DX than with the Kindle 2. Plastic Logic's e-reading device is scheduled to release in early 2010. Mum's the word on the suggested retail price. Because B&N has so many brick-and-mortar stores while Amazon does not, perhaps B&N will have at least one Plastic Logic reader at its larger retail outlets —chained, no doubt, to discourage pilfering—to allow readers and potential purchasers to touch and see.

Barnes & Noble claims to be offering over 700,000 titles through its e-bookstore, compared to the more than 300,000 Kindle editions claimed by Amazon. They plan to offer over 1 million titles in the near future. Barnes & Noble is putting some pressure on Amazon and others to decrease the price of their e-book content. They offer a standard price of $9.99, which would be good for a frontlist title, but not so good for some title in the public domain widely available for less or for free in electronic formats elsewhere.

The BN/PL system will be more open and less proprietary than the Kindle system. Content from the B&N e-bookstore is in the epub format, which many people see as the most viable, sustainable, and malleable of the e-book formats. B&N's new and improved e-reader software, based on the software acquired from Fictionwise, is described as "device-agnostic." You can read an e-book not only on the forthcoming Plastic Logic e-reader, but also on a plethora of smart phones, netbooks, laptops, and other portable devices. B&N also claims that they've made it easy to port an e-book from one device you own to another. For example, you could read the first chapter of an e-book on your netbook while sitting at the breakfast table, then continue reading chapter 2 on your smart phone during your commute to work.

Sony, which has been quietly contending with Kindle for years, continues to float like a butterfly while hoping to sting like a bee. In August Sony dropped the price for most of its content to $9.99. The new, smaller Sony PRS-300 Reader Pocket Edition will sell for $199. Amazon also dropped the suggested

retail price on its Kindle 2 paperback-sized e-reading device to $299.

What does all this mean for libraries and other organizations that want to weave e-reading into their organizational endeavors? Perhaps in several years, libraries will be out of the device market, simply vending digital content and services to a wide variety of devices. This may be a purification process for libraries whereby we shed our pulpy weeds and move towards a pure electronic landscape. Just as hockey has been described as a good fight marred by skating, perhaps libraries always have been good content and content-related service providers marred by matter, such as paper, bricks, and mortar. When libraries shuck the matter and leave the devices to others, libraries may matter even more. Perhaps through labeling and shelving, we lay waste our powers.

Or perhaps libraries will continue to be a player in the e-reading device market, either by designing some inexpensive, streamlined reading device more suitable for the library-style last-mile distribution methods, or by purchasing mainstream e-reading devices in bulk so that library users who otherwise could not afford these devices may experience the joys of e-reading. Even if e-reading devices become wildly popular, there may continue to be a segment of the reading public that cannot afford what Amazon, Sony, Barnes & Noble, and others have to offer, or that prefers to continue to use libraries because they are "free" in the sense of entailing no or little out-of-pocket expense.

A three-way smackdown involving Amazon, Barnes & Noble, and Sony seems to be developing for the US e-book market, with a few contenders sparring in the shadows. There seems to be little effort to make the content from one of these heavyweights transferrable to the device championed by one of the other heavyweights, although Google has been quietly making deals to make the content emanating from its mass digitization project displayable on many of these devices. None of these three companies seem to have developed an e-book vending system that is friendly to libraries and the time-honored role of using libraries to connect readers with books.

—Tom Peters

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www.bn.com/e-books

http://www.sonystyle.com/reader/

http://www.informationweek.com/news/hardware/handheld/showArticle.jhtml?articleID=219100337

http://www.nea.gov/news/news09/ReadingonRise.html

The Summer of Transformed Conferences

It was only a matter of time—for years, there has been talk within librarianship and beyond about new ways to offer professional conferences. Small-scale tests have been held using various webconferencing services in virtual worlds like Second Life and elsewhere. All this experimentation seems to have come to fruition in the summer of 2009, which may be remembered as the big bake-off for all of these new conferencing options.

If we pretend for a moment that summer began in April and ran through August, I can report that this summer I have experienced a wide-variety of conference options and experiences, including:

1. A large in-person conference (ALA Annual in Chicago), with a smaller webconferencing-based track, an unconference preconference, a few conference-related events held on ALA Island in Second Life, and lots of blogging and tweeting.

2. An in-world virtual conference in Second Life (Virtual Worlds: Libraries, Education, antd Museums)

3. A small combination in-person and webconferencing conference (Immersive Education Day). During this conference the opening keynote speaker tried to present via Skype. It didn't work, and because the conference was held in my metropolitan area, I participated in the in-person part of the conference.

4. A registration-fee-based webconferencing conference (The Handheld Librarian Conference), which was attended by hundreds of people.

5. A free webconference (OPALescence) that was attended by hundreds of people worldwide.

It has been very interesting having such diverse conference experiences in the space of a few short months. It made it easy to compare and contrast the various technologies and communication channels used. Here are a few tentative generalizations I have made:

- Good Internet connectivity in conference venues and other real-world meeting places is still not a given. You would think these venues would have been among the first places on earth to be reliably connected, but evidently they, along with rural places, will be among the last. Because of poor Internet connectivity, the virtual attendees of the meeting of the ALA VCL MIG (Virtual Communities and Libraries, Member Initiative Group) were not able to connect and communicate with the group that had gathered in person in Chicago to meet and discuss librarianship in virtual worlds. Trust everyone, but verify before you rely on a good Internet connection as an integral aspect of a conference event.

- Good presentation skills sometimes transfer from one conference environment to another, but not always. For example, chances are good that an engaging presenter in real-life is going to be engaging in a webconferencing or virtual world environment—but again, not always. Some good presenters who struggle when presenting in a webconferencing or virtual world environment have reported back to me that they miss the energy—including a dose of nervousness—they draw from an in-person audience, as well as the non-verbal communication to and from the audience. When you present via webconferencing, you don't get dreams about standing naked before an audience. In a virtual world, your avatar could make a naked presentation. It's up to you.

- Poor presentation skills almost always transfer from one conference environment to another. In fact, of all the different types of professional conferences I attended this summer, I would say that poor presentation

skills of some of the presenters were the common stumbling block. As Dr. Samuel Johnson once remarked about the poet Thomas Gray, "Sir, he was dull in company, dull in his closet, dull everywhere." Let's hope that the emergence of transformational conference experiences will motivate presenters to rethink and polish their presentation skills.

- "Blended" or "combo" conference events (e.g., events that are held in-person as well as in a virtual environment or via webconferencing) tend to work quite well. Offering a combo conference event allows people to choose the mode of attendance that fits best into their schedules and travel budgets. Assuming that the Internet connectivity is good, the next biggest stumbling block to a successful combo event is the audio. Virtual worlds and webconferencing software are much more finicky about audio sources and volume than are most in-person venues.

- Creature comforts demand the attention of conference planners, even if the conference event has no in-person aspect and is being held exclusively online, in-world, or both. Granted, in those cases you don't need to worry about lighting, room temperature, humidity, refreshments, and restrooms, but people still get restless after attending an hour or two of a professional conference event. Plan for some breaks and downtime.

- Back channels and side channels are becoming increasingly important components of conferences. By a side channel I mean, for instance, a rolling text chat conversation that emerges alongside a vocal and visual presentation being made by an individual or group of panelists. These side channels are common features

of webconferencing and virtual world conference venues. Sometimes the text chat supports the "main" conversation (e.g., when a text chatter provides a URL to support some initiative or concept made by the presenters), sometimes it challenges the main conversation, and sometimes it evolves into its own unrelated main conversation. These side conversations can enrich or enervate your experience of the conference event. By a back channel I mean something like the use of a hash tag in Twitter so that conference attendees and wannabe attendees can discuss what's happening at the conference.

- If you offer something to the entire world, people will attend from all over. At the OPALescence free online conference in mid-August people registered from many countries, including the usual suspects (USA, UK, Canada, etc.) as well as some pleasant surprises (Thailand, Peru, Colombia, Portugal, among others). While worldwide participation in professional library conferences held via webconferencing or in virtual worlds is wonderful and the wave of the future, it also presents some new challenges. There are so many time zones, and so few waking hours in an individual's day.

- One big challenge facing conference organizers of all types is how to convert attendees to a professional conference into some sort of ongoing community of interest that continues to explore and work on the topics discussed at the conference.

—Tom Peters

ILS Market News

A variety of notable events took place on the ILS market recently. There continues to be vigorous competition among a group of companies offering both proprietary and open source products.

Continuing its foray into the coveted municipal library field, Polaris was selected by the Miami-Dade County Public Library system to replace their existing Horizon ILS. Polaris, a long-time SirsiDynix customer, initially implemented Dynix in 1995 and migrated to Horizon in 2002. The 39-branch library system serves a population of over 2 million with a collection of over 4 million volumes. Miami-Dade will use the AquaBrowser Library as its primary end-user interface.

Other libraries recently selecting Polaris include the Concordia Parish Library in Louisiana, shifting from Galaxy, the company's own legacy product, the Palm Springs Public Library in California, moving from SirsiDynix Unicorn, and the Natchez Adams Wilkinson library system in Mississippi, which will migrate from SirsiDynix Horizon.

There have also been interesting developments in school libraries. Chicago Public Schools selected LibrarySolution for Schools from The Library Corporation for its 650 school library and media centers. This new system will displace multiple legacy products from Follett Software Company, and will allow the district to move to a centralized automation system, consistent with broad trends in the K-12 school automation arena. CPS ranks as the third largest school system in the United States.

The Library Corporation also announced the development of the LS2 Kids, a version of the company's new LS2 PAC designed for use by children, providing access to library materials through a simplified interface.

On the academic library front, Swinburne University of Technology in Melbourne, Australia will replace its current SirsiDynix Horizon system with a suite of products from Ex Libris, including ALEPH, SFX, MetaLib and Primo.

In Europe, Ex Libris Group acquired full ownership of Atlantis S.R.L., a company that has served as its distributor for Italy and Slovenia since 1989. Following the acquisition, Atlantis is now Ex Libris Italy, and will report through Marc Daubach, corporate VP for Ex Libris in Europe

The library of the new King Abdullah University of Science and Technology will come online with Millennium when it opens in September 2009.

On the open source front, the library for Madonna University, a private Catholic institution with a collection of 80,000 titles selected a hosted version of Koha from LibLime. Salina Public Library in Kansas, serving a population of about 50,000, will migrate from SirsiDynix Unicorn to Koha hosted by LibLime.

Implementations of the open source Evergreen ILS continue to come online. Three libraries in the SC Lends consortium in South Carolina, including the South Carolina State Library and Beaufort County Library, moving from SirsiDynix Unicorn, and Union County Carnegie Library previously using Follett's Infocentre, have put Evergreen into production. The Evergreen Indiana consortium now totals 32 libraries in production with the public libraries in Alexandria-Monroe, Limberlost, Waterloo Grant Township, Pike County, and Kendalville completing implementation in June 2009.

In personnel-related news, Galen Charlton joins Equinox Software, the key company involved in development and support of the open source Evergreen ILS, as it Vice President of Data Services. Charlton comes to Equinox from LibLime, which offers services surrounding Koha, another open source ILS. Debra Denault also departs from her position at LibLime as Operations Manger to become Director for Customer Service at Relais International, a company involved in resource sharing solutions.

—Marshall Breeding