Putting the Discovery in WorldCat Discovery

Daniel Jolley

Dover Memorial Library, Gardner-Webb University,
Boiling Springs, NC

OCLC WMS Global Community + User Group Meeting

Sept. 28th, 2017, 1:10 p.m.

Dublin, Ohio

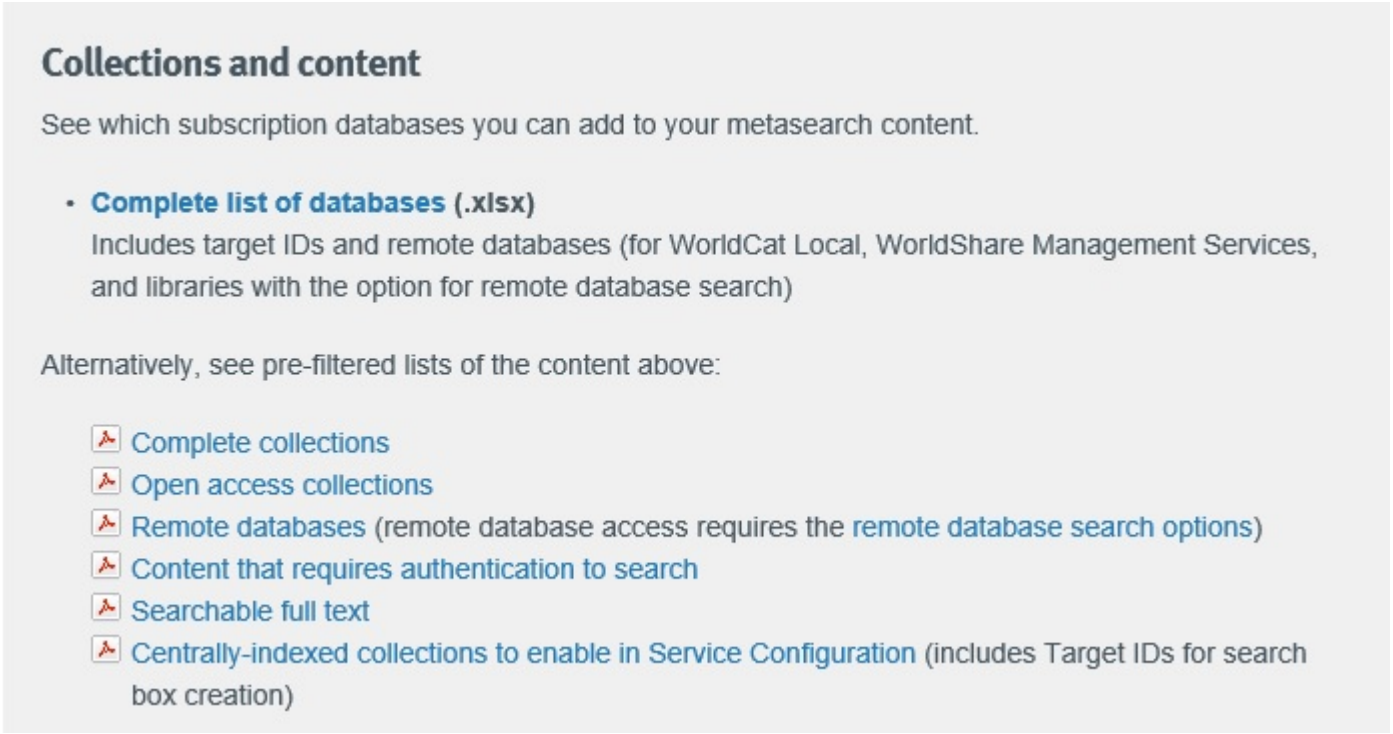
Gardner-Webb University info

- Located in Boiling Springs, North Carolina
- Founded in 1905 as Boiling Springs High School
- Baptist affiliated
- Over 4,000 students and more than 170 full-time faculty
- Five professional schools, two academic schools and 13 academic departments offer more than 80 undergraduate and graduate major fields of study
- NCAA Division I; member of Big South Conference
- Upset #23 Kentucky at Rupp Arena 84-68 in November 2007

GARDNER-WEBB UNIVERSITY

Start at the WorldCat Discovery Services documentation page

- https://www.oclc.org/support/services/discovery/documentation.en.html



Collections and content

See which subscription databases you can add to your metasearch content.

- **Complete list of databases (.xlsx)**
  Includes target IDs and remote databases (for WorldCat Local, WorldShare Management Services, and libraries with the option for remote database search)

Alternatively, see pre-filtered lists of the content above:

- Complete collections
- Open access collections
- Remote databases (remote database access requires the remote database search options)
- Content that requires authentication to search
- Searchable full text
- Centrally-indexed collections to enable in Service Configuration (includes Target IDs for search box creation)

GARDNER-WEBB UNIVERSITY

Types of collections

- Complete Collections are in the WorldCat Discovery central index and searchable as discrete collections.
- Open Access Collections
- Remote Databases require the remote database search options. Content that requires authentication to search.
- Searchable Full Text. There are just a handful of these.
- Centrally indexed collections to enable in Service Configuration
- Complete list of databases at https://www.oclc.org/content/dam/oclc/worldcat-discovery/contentlisttargetID.xlsx

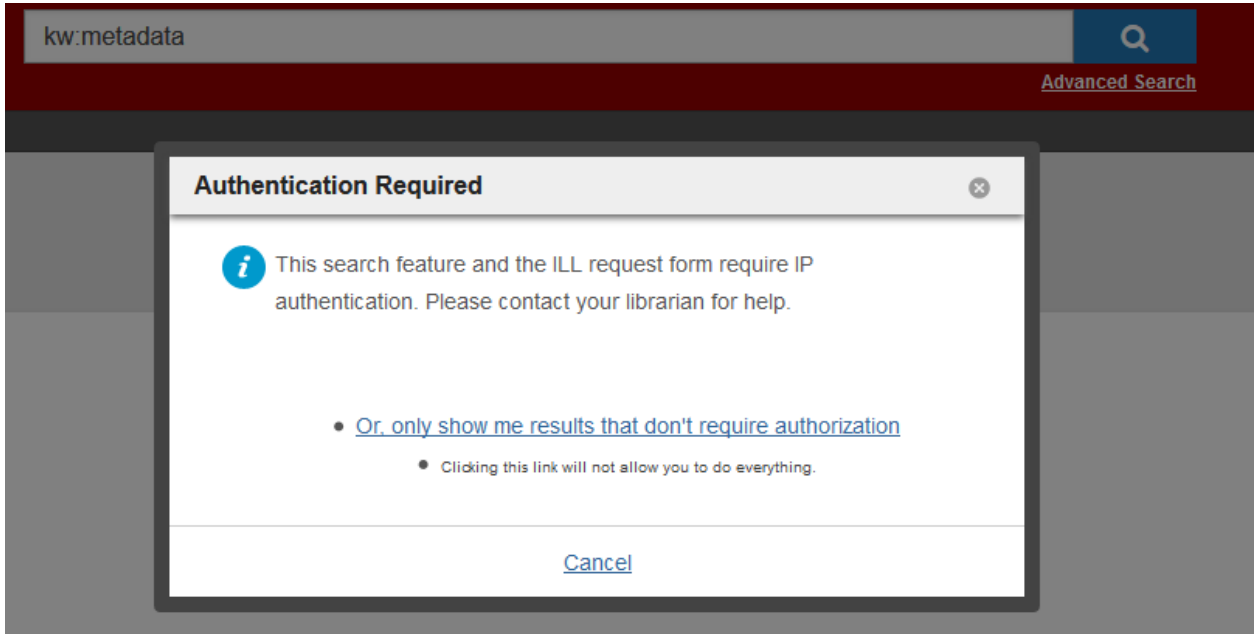
GARDNER-WEBB UNIVERSITY

The Central Index includes the following:

- The 13 former “FirstSearch base package” databases
- 200 million+ article-level records from sources such as ERIC, HathiTrust, MEDLINE, and Elsevier metadata
- Complete metadata from 900+ content collections from EBSCO, Gale, ProQuest, Springer, and other content partners. Access is determined by subscription.
- Majority of metadata for 750+ collections based on ISSNs; information comes from journal publishers, ebook providers, etc.
- Vendor record sets requested by member libraries

Before you start adding databases…

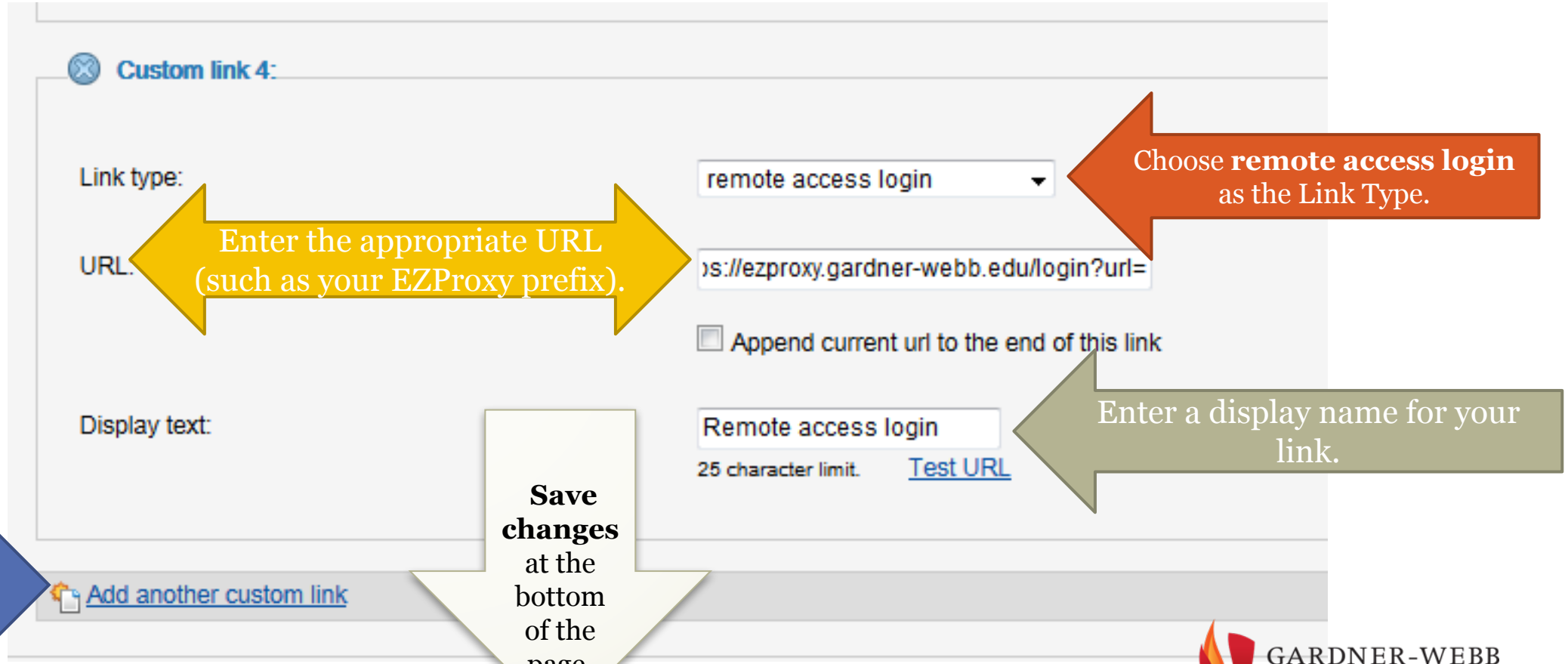
You must configure your system to authenticate off-campus users. If that is not done, off-campus users will see the following screen:



GARDNER-WEBB UNIVERSITY

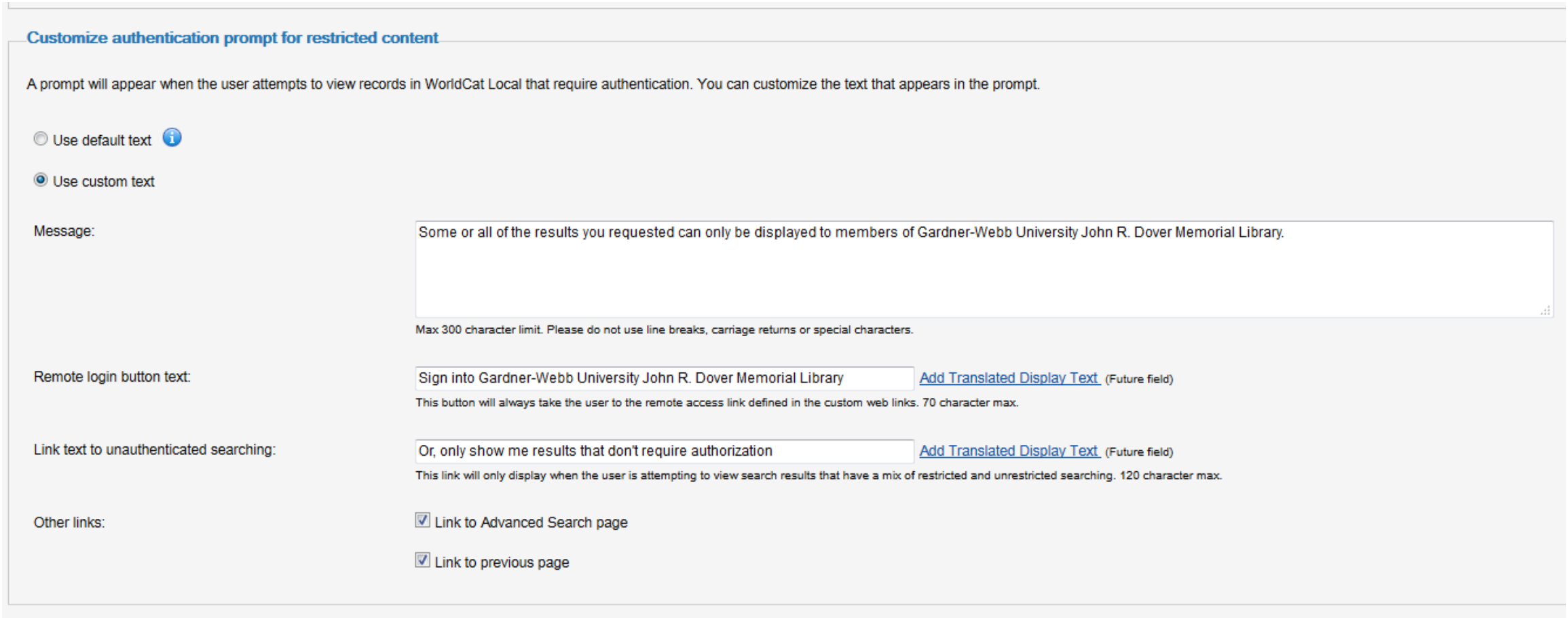
Setting up remote authentication

In OCLC Service Configuration, go to MyWorldCat.org – User Interface Options.



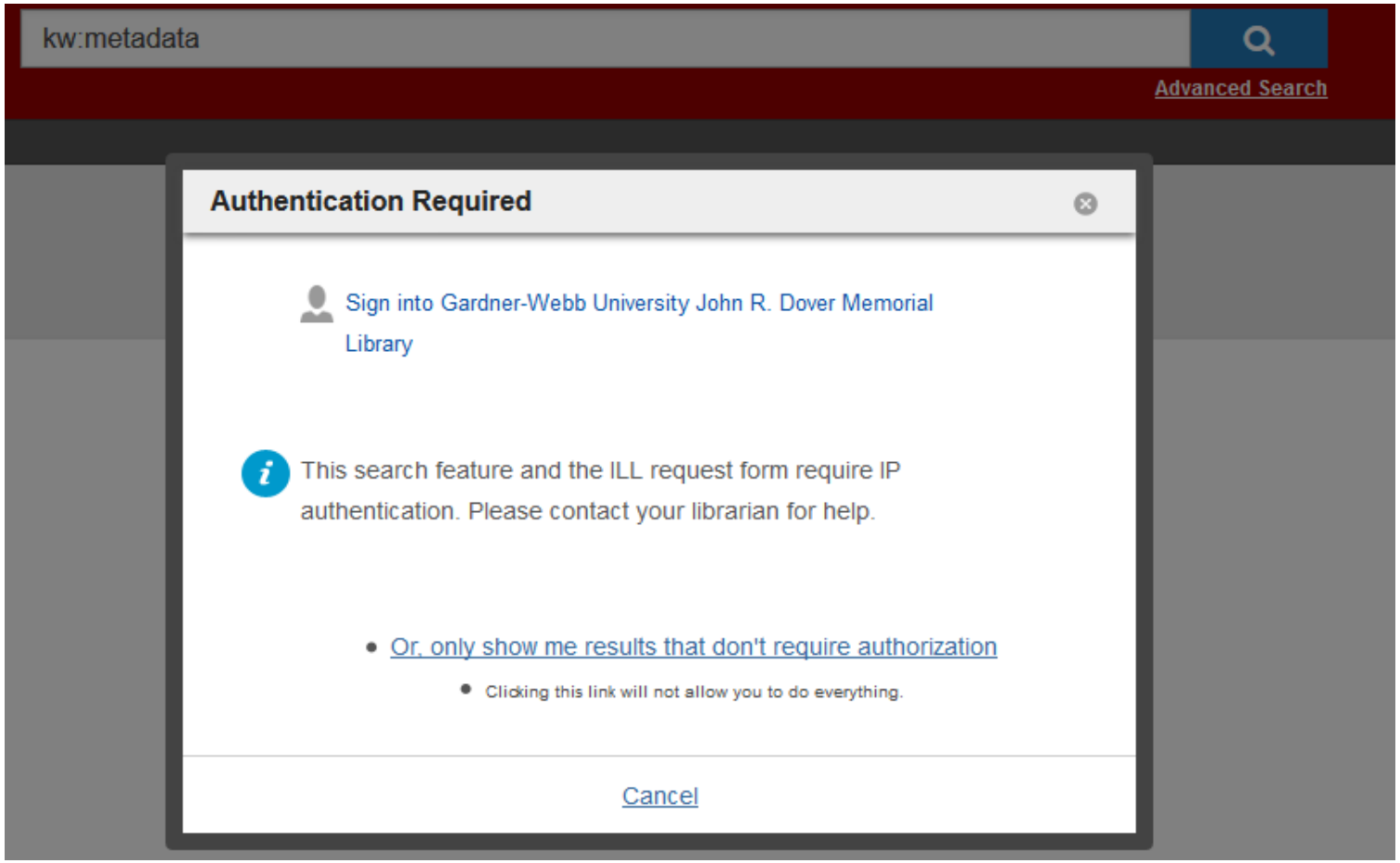
GARDNER-WEBB UNIVERSITY

Customize the authentication prompt screen



Remote access login page

- Now, remote users will see this screen:



GARDNER-WEBB UNIVERSITY

Remote access login

- Clicking on Sign into Gardner-Webb University John R. Dover Memorial Library, the user is taken to our proxy server login screen.
- After successfully logging in with his/her user credentials, the user is taken to the search results screen.
- Users who do not have login credentials (such as our community users) will need to click the other link, which allows them to search the resources that do not require authentication.

GARDNER-WEBB UNIVERSITY

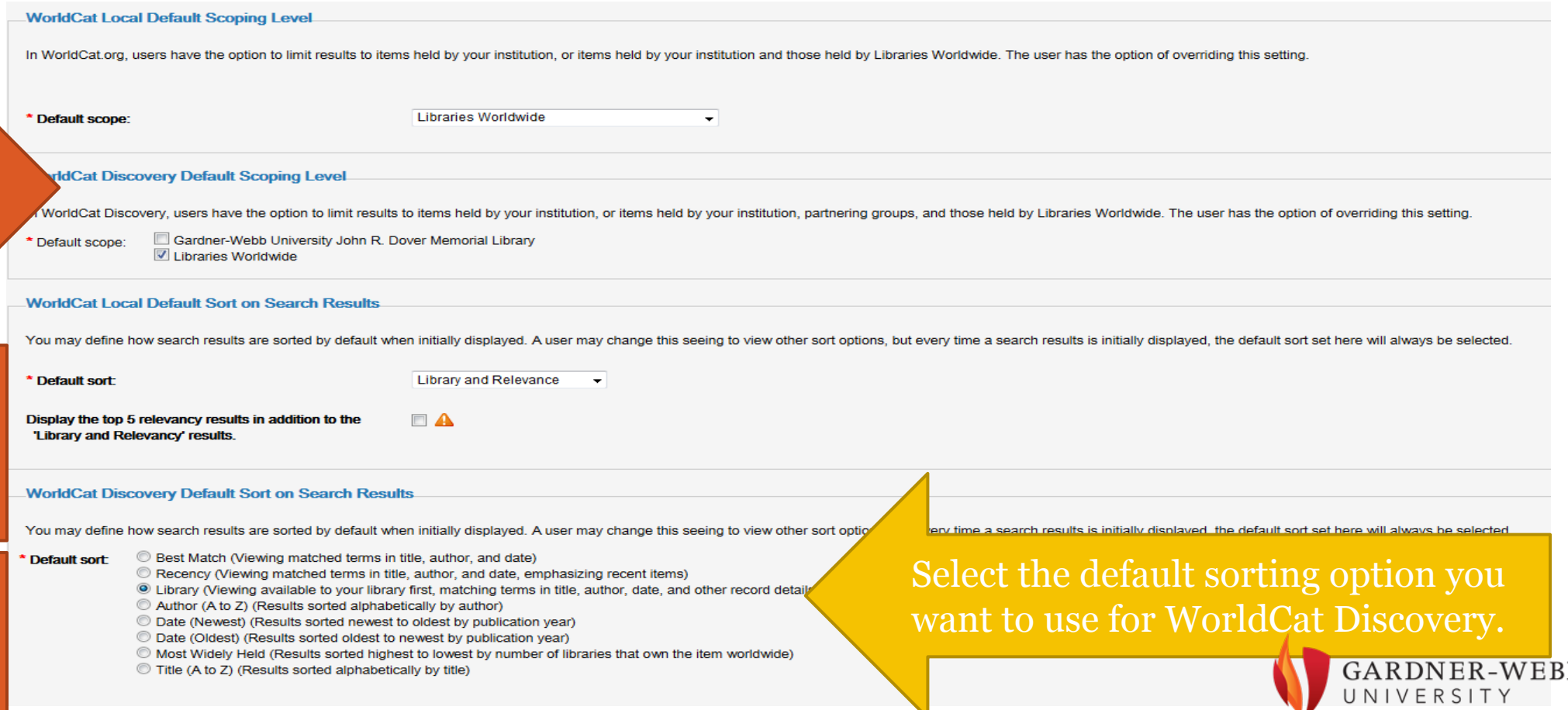
To Set the WorldCat Discovery Default Scoping Level

Go to the OCLC Service Configuration under My WorldCat.org—Relevancy and Scoping.

To turn on article-level searching, you need to change the default scoping level of WorldCat Discovery to Libraries Worldwide.

To search all of your database content, you need to search Libraries Worldwide, not just your library.

If your library is your default scope, some databases will not return any search results.



Select the default sorting option you want to use for WorldCat Discovery.

GARDNER-WEBB UNIVERSITY

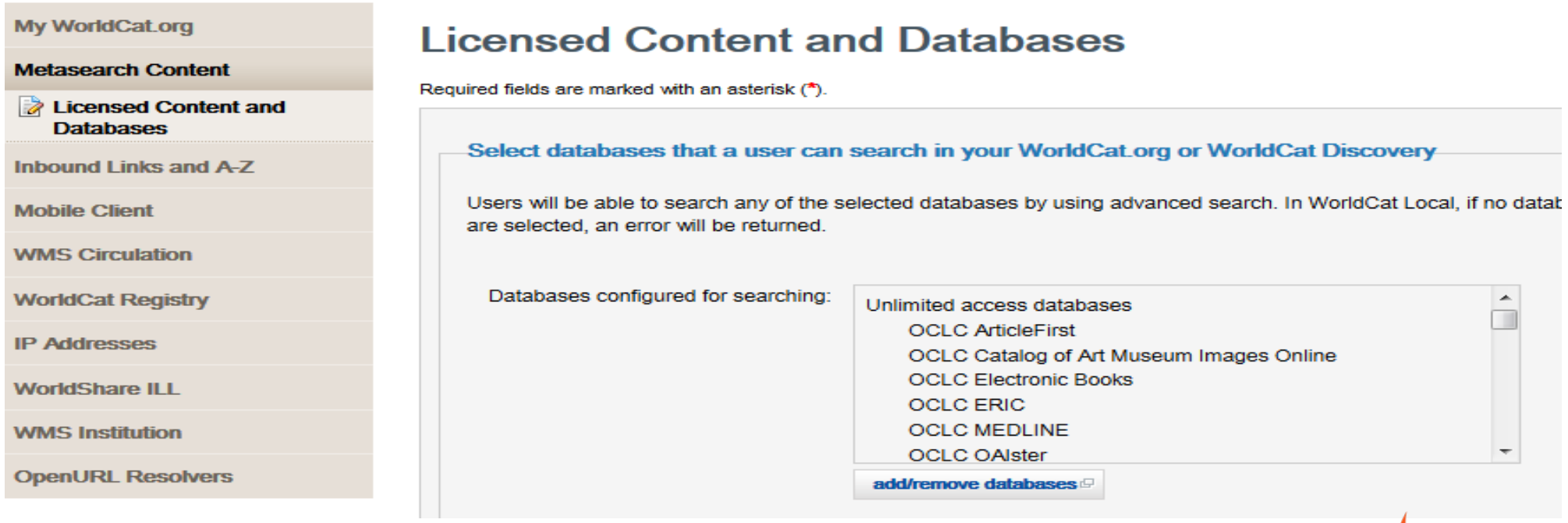
Now you can start adding databases

- You add your databases in OCLC Service Configuration, under Metasearch Content – Licensed Content and Databases. These are divided up into two categories:
- Unlimited access databases – these are the OCLC databases plus the US Government Printing Office Monthly Catalog.
- Non-OCLC licensed databases

GARDNER-WEBB UNIVERSITY

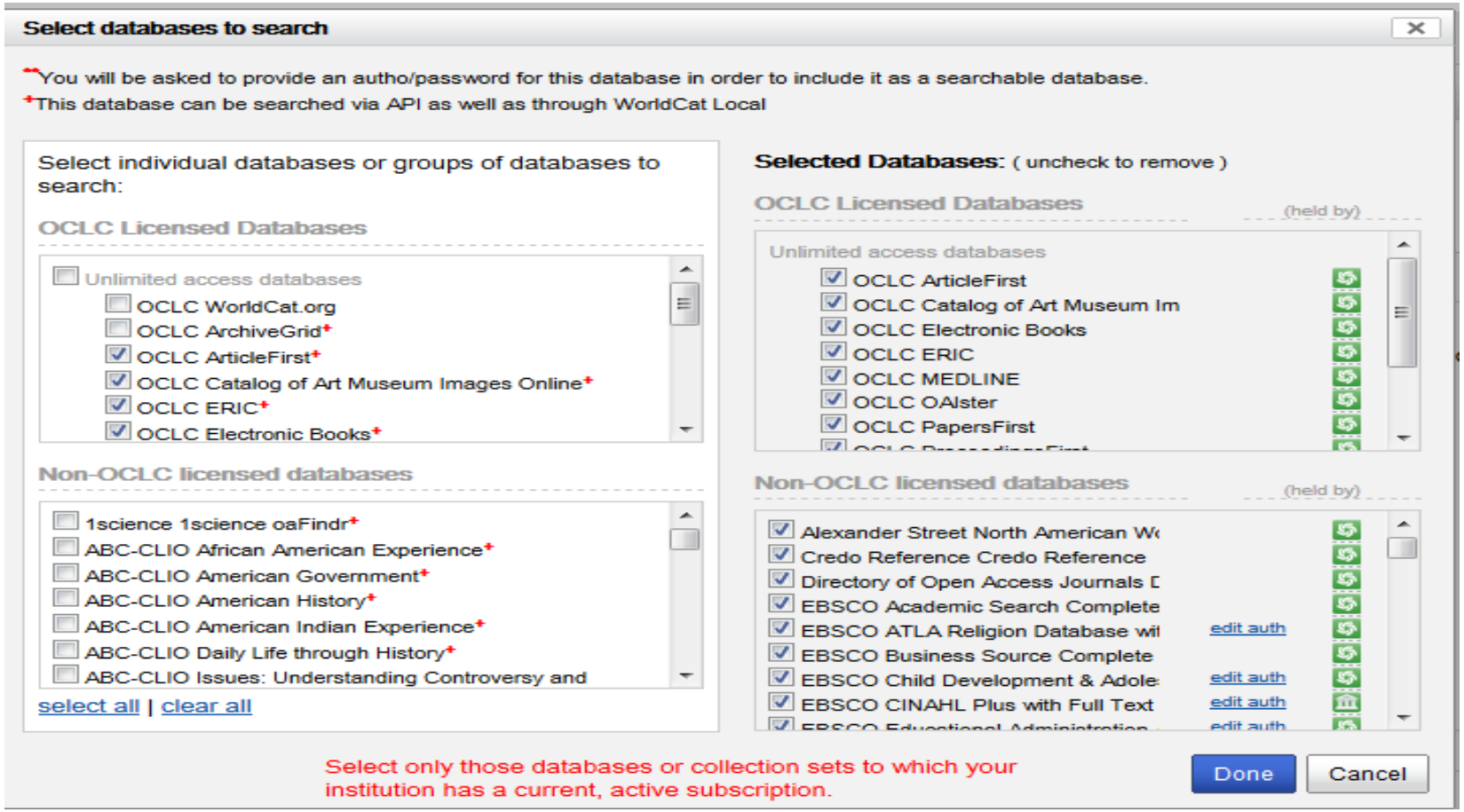
Databases configured for searching

- To make your selections, click on Add/Remove Databases:



GARDNER-WEBB UNIVERSITY

Select databases to search screen



GARDNER-WEBB UNIVERSITY

Selecting databases to add

- When you click on a database in the left column, it will automatically be added to the selected databases in the right column.
- Notice that entries marked with two red asterisks will require an authorization and password if you want to include them.
- The green symbol means that the database uses holdings in WorldCat to determine if your library holds an item. If the database can be treated as held, you can click on the icon to switch it – this supposedly elevates your holdings from this database in the search results.

GARDNER-WEBB UNIVERSITY

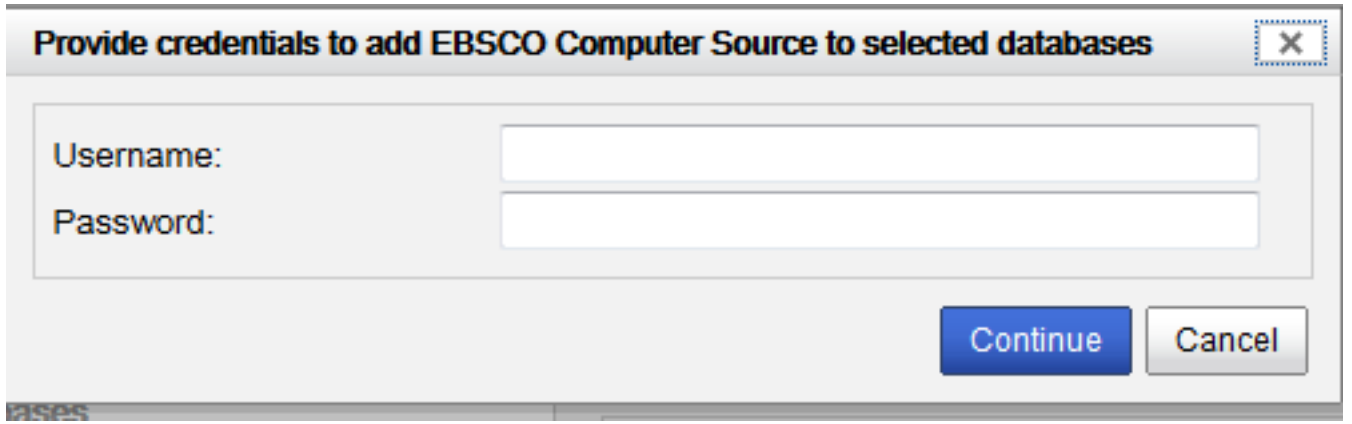
Some databases require authorization

- You will notice there that some databases (most EBSCO databases, for example) have an “edit auth” link beside them. If you click on one of these to add it to your selected database, it will prompt you for authentication credentials.
- If an invalid authorization is entered here, this database will not be searched by WorldCat Discovery.
- The wording is rather vague – the login I needed for our EBSCO databases was our Z39.50 EBSCO login.

GARDNER-WEBB UNIVERSITY

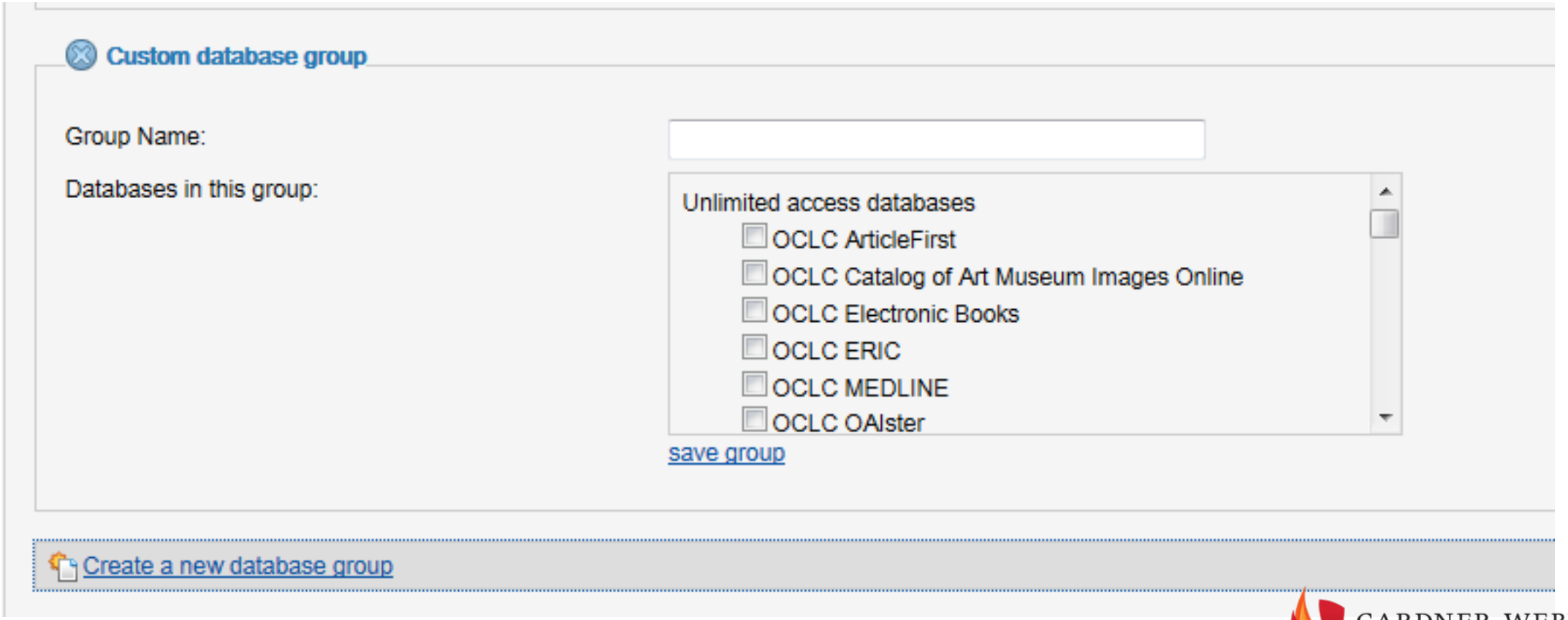
Authorization credentials prompt screen

The credentials you entered are not verified in OCLC Service Configuration. The only way to test them is to execute a search of that database in WorldCat Discovery.



GARDNER-WEBB UNIVERSITY

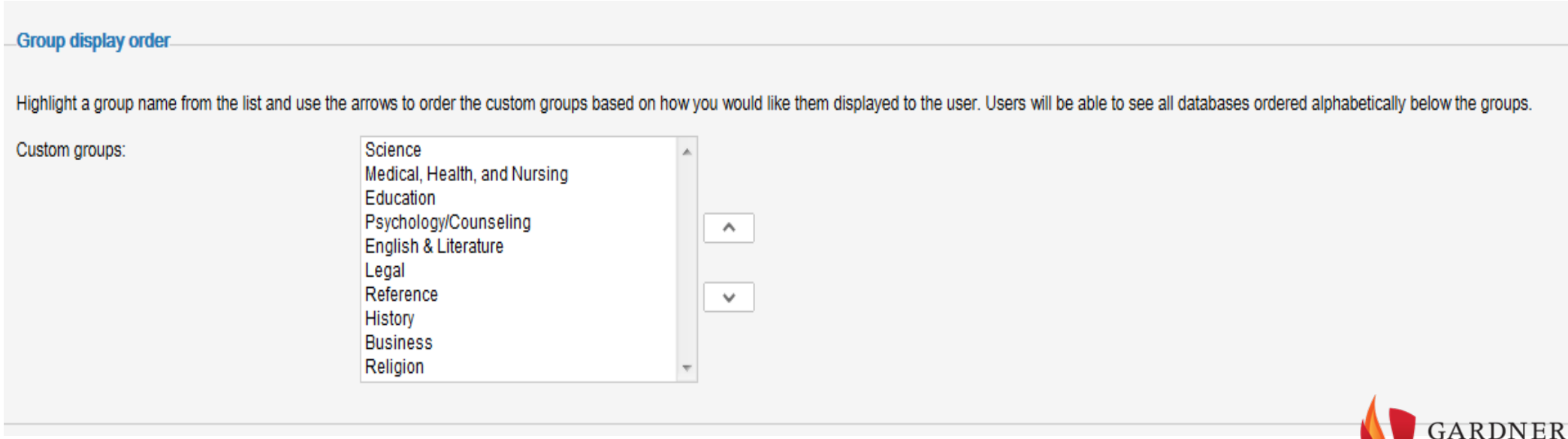
Create customized database groups



GARDNER-WEBB UNIVERSITY

Setting the order of custom groups

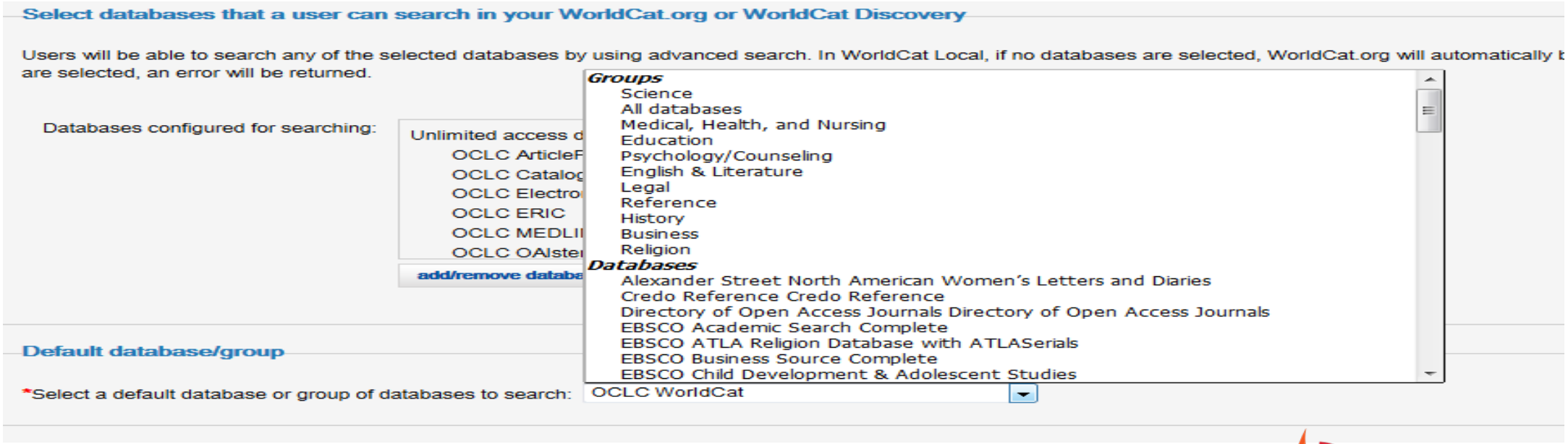
- Once you have created all of your custom database groups, you can choose the order in which you want them to display on the Advanced Search screen.



GARDNER-WEBB UNIVERSITY

Setting the default search

- Choose which database or database group you want to set as your default



GARDNER-WEBB UNIVERSITY

Bibliography

- WorldCat Discovery Services documentation page https://www.oclc.org/support/services/discovery/documentation.en.html#lists
- Getting Started with OCLC Service Configuration (Service Configuration help page) http://www.oclc.org/support/help/config/ApplicationHelp.htm#welcome.htm%3FTocPath%3DIntroduction%7C_____1
- Service Configuration Guide (204 page PDF) http://www.oclc.org/content/dam/support/worldcat-local/documentation/ServiceConfigurationGuide.pdf

GARDNER-WEBB UNIVERSITY

GARDNER-WEBB
UNIVERSITY