

Federated Search Symposium: Panelist Fact Sheet

This fact sheet is intended to give contextual information for the panelist discussions.

Panelist Name: **Regan Balfour**

Institution: **Saskatchewan Institute of Applied Science and Technology (SIAST)**

Product: **Serials Solutions (Central Search)**

When Implemented: **September 2005**

Description of the Collection (Name of Database Products and Subject Matter) the Federated Search Tool is Searching: **The collection consists of 25 article databases, 1 e-book collection, our OPAC, 1 e-journal collection, and 2 reference sources. There are about 9 e-resources not included for various technical or practical reasons.**

Resources in SIAST's Central Search: **Agricola (free version), Business and Company Resource Center (Gale), Business ASAP (Gale), Catalogue (SIAST Libraries), CBCA Business (Proquest), CBCA Current Events (Proquest), CBCA Education (Proquest), CBCA Reference (Proquest), CINAHL (Ovid), Clinical Pharmacology (Ebsco), CPLQ (Gale), Ebrary, EbscoHost EJS, Encyclopedia Britannica, Expanded Academic ASAP (Gale), General Reference Center Gold (Gale), Health and Wellness Resource Center (Gale), Health Reference Center Academic (Gale), Health Source: Nursing/Academic Edition (Gale), InfoTrac Onefile (Gale), InfoTrac Student Edition (Gale), LegalTrac (Gale), Literature Resource Center (Gale), Medline (Ebsco), Oxford Reference Online, Canadian Newsstand (Proquest), Psychology and Behavioral Sciences Collection (Ebsco), PubMed Central**

Description of Users (Intended Audience):

Students, staff and faculty participating in 1-2 year programs ranging from health sciences, engineering technology, human services such as corrections workers, natural resources, tourism, computer technology and trades programs from four campus locations spread out across Saskatchewan. We also deliver the first two years of the Nursing Education Program of Saskatchewan, which results in a nursing degree.

Maintenance Requirements for the Product (Hardware, Software, Initial Configuration and Set-Up, Staff Support, etc):

Initial Set-Up: Serials Solutions sent us two forms to be filled out. An extensive list of our electronic resources was required, including the names, descriptions, URLs, subjects, usernames and passwords for the databases. This form took about one month to complete as it was difficult to get the usernames and passwords for some of the resources from the vendors. The second form was for customization, which allowed us to use our own logo and our own wording for some navigation links. Hardware: No hardware was required on our end. Software: No software was required on our end. Staff Support: None. Staff uses the web-based Client Center to add databases and maintain our account. Otherwise, the Serials Solutions team provides full support for the product. My contact person with the company is very helpful.

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Panelist Name: **Michael Silver**

Institution: **Parkland Regional Library**

Product: **Consolidated Searching (rebranded WebFeat 2) and 3**

When Implemented: **Implemented Consolidated Searching in May of 2004. Currently migrating to WebFeat 3.**

Description of the Collection (Name of Database Products and Subject Matter) the Federated Search Tool is Searching:

Consolidated Searching (WebFeat 2):

Note that Consolidated Searching is very resource intensive. We were unable to get over 9 translators working without crashing our web-based catalogue. Use of Consolidated Searching results in very long waits for results.

Note also that Consolidated Searching is not working at all at the present time (January 19, 2006).

- Alternative Health Watch
- EBSCO Agricola
- Canadian Reference Centre
- ERIC
- Health & Wellness Resource Center
- CPIQ
- General Reference Center
- Proquest Canadian Newstand
- Proquest CBCA Business

WebFeat 3

Note that WebFeat 3 is not in production as of yet (January 19, 2006) due to problems with IP authentication of library workstations.

- Academic Search Elite
- Agricola
- Alternative Health Watch
- Associations Unlimited
- Business Index ASAP
- Business Source Elite
- Canadian Newsstand
- CPIQ
- Canadian Reference Centre
- Clinical Pharmacology
- ERIC
- General Reference Centre Gold
- Health and Wellness Reference Center
- Health Source Consumer

- Health Source Nursing/Academic
- MasterFile Premier
- MedLine
- Psychology & Behavioral Sciences
- Regional Business News

Description of Users (Intended Audience):

Our users fall into two overlapping groups:

- Anyone physically present in one of our libraries, and
- Patrons in good standing via remote access

Maintenance Requirements for the Product (Hardware, Software, Initial Configuration and Set-Up, Staff Support, etc):

Consolidated Searching runs on the same server as the web-based catalogue. This caused a number of issues including extraordinarily long search times and overuse of system resources. Additionally, the number of remote databases that could be searched were limited to just under half of those to which we subscribe. Support for Consolidated Searching has been problematic as it was a third party add-on which is not well supported by the ILS vendor.

WebFeat 3 is a hosted service. There is no hardware or software set up involved past supplying the data source information to WebFeat and putting a link on the catalogue interface. However, there are continuing problems with our need for both IP authentication for library workstations and remote patron authentication for remote access via the Internet. Presently the test environment works for remote access but not for in-library use. While the interface is much improved, support is still an issue and we have not yet managed to accomplish a fully working production environment.

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Panelist Name: **Diana Guinn, Chief Librarian, Port Moody Public Library and former Project Manager for *Beyond our Walls*, Industry Canada Project (2000-2004)**

Institution: **Representing Port Moody Public Library and Coquitlam Public Library**

Product: **AGent – Autographics**

When Implemented: **Live April 2004.**

Description of the Collection (Name of Database Products and Subject Matter) the Federated Search Tool is Searching:

- **AGent searches the two libraries' native catalogues (Dynix Horizon - PMPL and Geac Advance - CPL), the Outlook provincial catalogue (public libraries and college catalogues), several databases, encyclopedias, and web links.**
- **The search options are presented to the patron depending how the patron has signed in – with his or her patron barcode or as a guest, and what library system he or she wants to come through (either remotely or in the library – e.g. Port Moody remote/Port Moody in-library, Coquitlam remote, Coquitlam in-library). Full access is granted to library card holders; guest access is limited to a few tools plus the catalogues (licensing reasons).**
- **Catalogues of Port Moody and Coquitlam Public libraries: While searching the two catalogues (Z39.50), the user is presented with each library's holdings under the common AGent gateway with enhance features offered through Syndetics. The user can also place holds in the native catalogue through AGent (for Port Moody only at the time of this write up).**
- **Databases include: Port Moody - Ebsco Masterfile, Ebsco Business Magazines, Proquest Canadian Newspapers, Ebsco Clinical Pharmacology, Gale Health and Wellness Resource Centre, Ebsco Health Source Consumer, Ebsco Health Source – Nursing, and Chilton's Auto repair manual (in library only).**
- **Coquitlam databases – Same databases as above (except Health & Wellness & Chilton's), plus Ebsco Academic journals, Ebsco Computer Source, and Ebsco Religion and Philosophy, BC Stats (in library only).**
- **Encyclopedias and other information: Canadian Encyclopedia, Encyclopedia Britannica (PMPL) , Encyclopedia of BC, Funk and Wagnall's (PMPL), , Novelist, Ebsco Animals (PMPL), Ebsco Primary Search Searchasaurus (PMPL), Access Science (PMPL), World Book (PMPL).**

Description of Users (Intended Audience):

- **All members of the public – library card access gets them to the databases and catalogues; Guest access – catalogues and some databases. and web links only.**

Maintenance Requirements for the Product (Hardware, Software, Initial Configuration and Set-Up, Staff Support, etc):

- **The product has been set up as an ASP so there are no hardware requirements for CPL or PMPL at the local level; the initial set up was done by Autographics, and new databases are now added by CPL and PMPL staff. Each library has an administrator who can monitor use of the product, statistics.**

Each library responds to trouble calls, reports to vendor who is quite responsive.

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Panelist Name: **Bennett Claire Ponsford**

Institution: **West Texas A&M University**

Product: **ExLibris' MetaLib**

When Implemented: **Purchase (with SFX) – 2003, Training – November 2004, Testing – Spring/Summer 2005, WTAMU production – September 2005, TAMU soft release – September 2005, TAMU full production – January 2006**

Description of the Collection (Name of Database Products and Subject Matter) the Federated Search Tool is Searching:

Library catalogs/databases via Z39.50, XML gateways, or HTTP protocol

Description of Users (Intended Audience): **Academic library users of all levels**

Maintenance Requirements for the Product (Hardware, Software, Initial Configuration and Set-Up, Staff Support, etc):

Server: Sun-Fire-480R sparc with 16 GB memory, 4 processors.

Metalib software (includes Oracle runtime license, version 9, for Knowledgebase)

Initial server configuration was done by TAMU Computing & Information Services (CIS) staff. Metalib & embedded Oracle software install done by ExLibris staff remotely.

Ongoing server administration: TAMU CIS

Ongoing MetaLib application maintenance: TAMU Library Consortia Systems staff

Collection set-up: Individual libraries in the TAMU System (11 libraries)

TAL Federated Search Symposium – Feb. 2-3, 2006
Reactor Discussion
Speaker's Notes – Mary Westell

This session will briefly summarize the highlights of the previous sessions and provide an opportunity to comment on questions that may have arisen from the other sessions or over lunch.

The end user

- Wants searching to be simple, quick, and unmediated
- Expects to be able to search and retrieve information across multiple services/products and be presented with a single ranked list
- Generally doesn't care so much what database is being searched as long as there is an answer/citation
- Is satisfied with "good enough"
- BUT, also wants the ability to subset searches – by specific subject, by full text only, by only those products licensed to them, by the most current information, for example

Reference Librarians

- Want simplified searching and a single catalogue interface
- Want "slices" of databases, with the ability to subset to choose a variety of entrances into the databases, including highly tailored portals for specific audiences
- Want configurable metasearch tools that reflect their subject or organization
- Want to be able to move easily from metasearch tools to native database interfaces, and have the ability to use the special features that these interfaces provide
- Are not sure what is "good enough" and regret that the user may be missing important information if using a generic interface.
- Don't want to see searching "dumbed down"
- Are beginning to apply user testing tools to develop a closer understanding of user needs.

The Organizations (libraries and consortia)

- Know there is lots to learn about this technology and also understand that it is not yet fully developed
- Are dealing with a complicated environment of many players – publishers, aggregators, software vendors, integrated library systems, etc.
- Are dealing with a broad environment, whether academic or public, including integration with teaching tools, portals, RSS feeds and other new tools

- Are concerned about practical issues of user satisfaction, response time, delivery of quality products, usage statistics, reporting to various agencies, etc.
- Need the specialized ability to brand and customize their products
- Need to ensure a cost effective implementation, whether locally loaded or using an ASP model
- Need to understand the staff commitments for this new tool – programming staff, staff to configure knowledge bases, public services implications, etc.
- Bennett covered the consortial implications very well in her presentation
- Individual libraries need to approach federated searching from a team perspective, ensuring that input from public services, collections, systems, and the user are all considered in any implementation. At the University of Calgary we have a group called the ERG (Electronic Resources Group) that spans the entire library and provides excellent perspectives for decision making.

The Vendors

- Publishers and aggregators have made a costly investment in native interfaces – how do they view this effort to “homogenize” all interfaces?
- Now they are being asked to support protocols and standards that support the transmission of structured data
- Where they have built special features, they need guidance from the user in providing these features through federated searching
- Need time to set priorities and deliver results
- Need to be given clear expectations by the customers to help drive development
- Software vendors need to work with publishers and aggregators to develop a good product
- Software vendors need to develop simple, easy to customize interfaces and architecture that provide flexible use – standards, API, etc.
- Software vendors need to be honest with customers that this is not simple work (Michael Silver’s comments)

Lois Hole Campus Alberta Digital Library

I thought it might be interesting to comment on our deliberations in the Lois Hole Campus Alberta Digital Library technology group – as we discussed federated searching and how we might support such a service for the academic libraries in the province. We looked at a number of models, both theoretical and already in place. With apologies for oversimplifying, we came to the conclusion that there are two extremes – using pure broadcast metasearch either through an open source or commercial tool, OR locally loading metadata and even full text and providing a single search interface with the ability to pre-process some searches. We costed both models, purely from the technical point of view, and the second model was cost prohibitive for us.

We did believe, however, that the federated searching market was not yet mature enough for us to make a recommendation on a particular broadcast search project. So we hedged our bets and recommended the following:

- That all product licenses for the LHCADL include our ability to harvest and locally load metadata and even full text, where possible
- That a project would be developed to use open source tools to test the features of broadcast metasearch
- That another project would be developed to test the local loading of metadata
- That these projects would be analyzed to assess the initial and ongoing costs, performance, and user satisfaction
- Keep a watching brief on metasearch tools and work closely with individual LHCADL members on projects

Just a couple more comments on the overall environment for federated searching:

- It is important to look at broadcast searching (particularly) in the context of Web 2.0 and the various web services models that emphasize platform independence, collective intelligence, etc. Programmers are developing and users are using individualization/personalization features – think about folksonomies, Flickr, portal features. It is important to look at products in the context of the latest developments.
- Roy mentioned the NISO standards – we need to work closely with vendors and demand that they provide systems that support standards.