

What is a portal?

And how might it help you find stuff faster?

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# What is a portal?

- No good definition
  - “‘portal’ is one of the least helpful words we have developed in recent years as we come to terms with the changing information environment in which we research, learn and work.” Lorcan Dempsey, September 2003
- General idea is one-stop shopping
- Term used for some very different things
  - Amazon
  - Employee Express
- LCPAIG considered **portal applications used in libraries to support research**
- **Software applications** – not static lists
  - **not** *Portals to the World* (pathfinder web pages)

# Problem faced by many libraries

- Effective use of the combination of online sources of information available
  - local catalog and licensed resources
  - bibliographic databases and full text
- LCPAIG arranged tests of three products
  - Zportal (Fretwell Downing)
  - MetaLib (Ex Libris)
  - Encompass (Endeavor)
- None of them was quite ready for LC use
  - Marketplace developing fast
- Learned a great deal

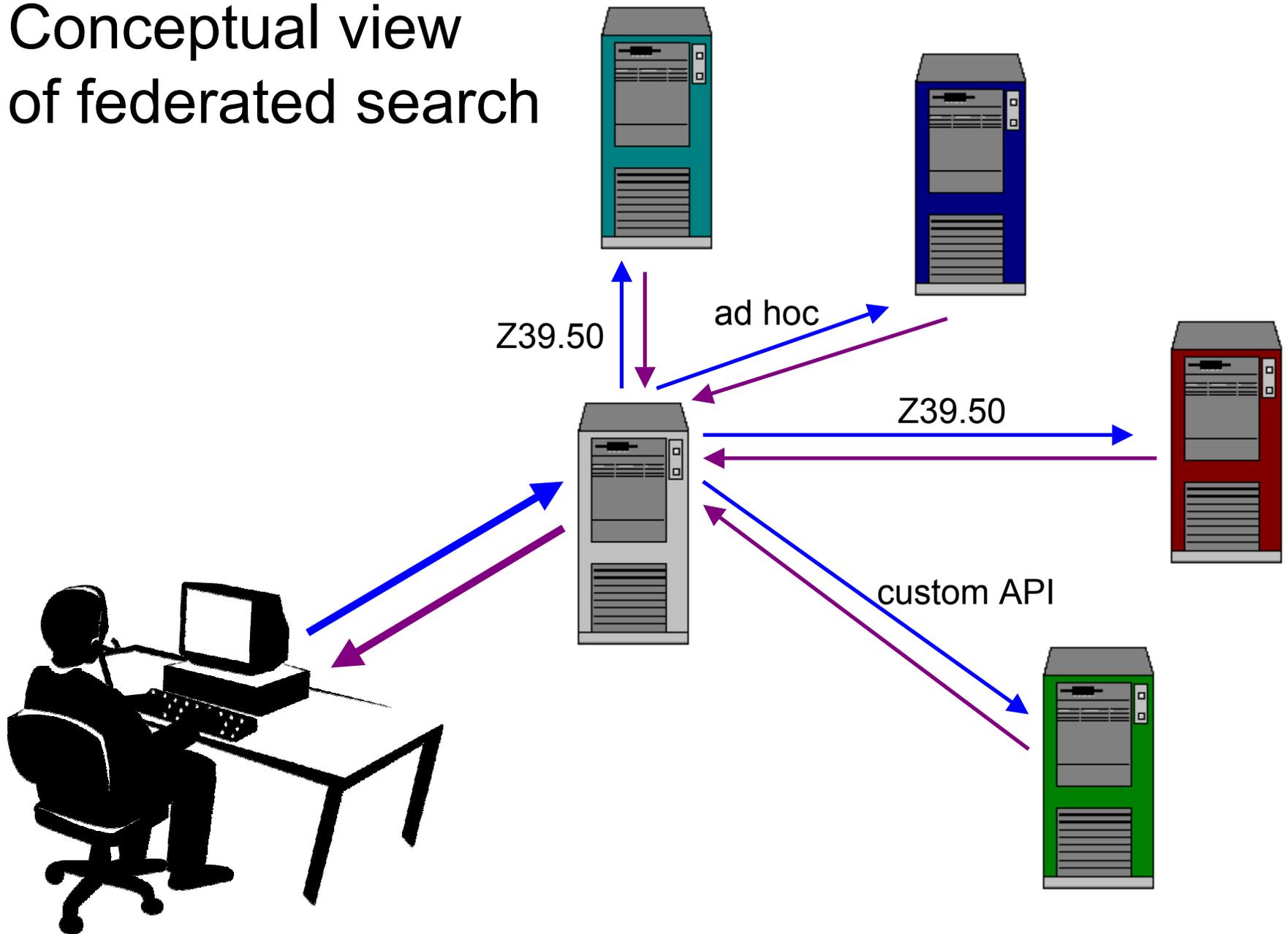
# How might these portal applications help?

- **Federated search** of independent resources
  - LC's OPAC, ArticleFirst, Ebsco Host, etc.
  - aka metasearch
- **Getting to full text** from citation in bibliographic database
  - from record in ArticleFirst to full text in ProQuest
  - supported by OpenURL resolver products (can be separate)
- Support for **personalization** and **customization**
  - Pre-configured groups of resources
  - Personal preferences
- **Finding appropriate resources**

# Federated search – the dream

- Single search of a large number of high-quality bibliographic databases, and full text resources
- As easy as Google
- Google with access to the “hidden” web
- Library-type search capability
  - Author, Title, Subject, ISBN, etc.
- Valuable for LC staff **and** users
  - Copy cataloging, acquisition, reference
  - Lead users to best resources or comprehensive retrieval for topic or task
- Fuller use of licensed resources

# Conceptual view of federated search



# Federated search – the reality today

- State-of-the-art falls short of the dream
  - Poor response compared with Google (or even the OPAC)
  - 8 seems to be a pragmatic limit for number of resources to search at once
  - Can't make up for inconsistent metadata
  - Can't make up for limitations or differences in indexing
  - Experts miss powerful native interfaces
- But can still help us find stuff faster
  - Single search of a small set of relatively coherent resources
  - Searches for very specific terms, names, etc.
  - Organized or personalized groups of resources tailored for **task** or **topic**

# Thinking about specific tasks

## What Most Users Want

(according to Roy Tennant, California Digital Library)

**The Digital Librarian**

*What do you want to find today?*

Find everything you can    Just a few good things, thanks!

**Or...**

Find a specific item:  
*Fill in whatever you know, leave the rest blank!*

Author

Title

Date

Publisher

The image shows a web interface for a digital library search. At the top, the title 'The Digital Librarian' is displayed in a bold, black font. Below the title is the question 'What do you want to find today?' in a smaller, italicized font. There are two search options: 'Find everything you can' and 'Just a few good things, thanks!'. Below these is a dark blue bar with the text 'Or...'. Underneath is a yellow box containing the text 'Find a specific item:' and the instruction 'Fill in whatever you know, leave the rest blank!'. There are four input fields labeled 'Author', 'Title', 'Date', and 'Publisher'.

Task-based thinking will guide replacement for CDL's Searchlight  
[<http://www.cdlib.org/cgi-bin/searchlight>]

# Walkthrough

- Just for a general idea
- Screen shots taken from
  - Cornell (Encompass)
  - Boston College (Metalib), from presentation by Ed Tallent for MOUSS Catalog Use Committee at ALA (Toronto, June 2003)

# Pick resources to search

- Click from a list
- Pre-configured combinations
- Personal preferences

# Pick resources to search (1)

Gateway to  
**CORNELL UNIVERSITY LIBRARY**

**Find Articles**   **Find Databases**   **Find e-Journals**   **ASK A LIBRARIAN**  
email | chat | phone

Simultaneous searching for articles in selected databases

Library Gateway   CU Catalog   Help

Keyword(s):

[Search Tips](#)

Searches will return up to 50 hits from selected databases. For a more complete list and advanced search capabilities, start with [Find Databases](#).

## General

- ArticleFirst (1990- ) [[more info](#)]
- Encyclopaedia Britannica online [[more info](#)]
- OCLC electronic collections online [[more info](#)]
- ProQuest: ABI/Inform and Periodical Abstracts (1999-) [[more info](#)]

## Arts & Humanities

- Art full text [[more info](#)]
- Art index retrospective [[more info](#)]
- ArticleFirst (1990- ) [[more info](#)]
- Avery index to architectural periodicals (1930- ) [[more info](#)]
- Dissertation abstracts online (1861- ) [[more info](#)]
- Linguistics and language behavior abstracts : LLBA (1973- ) [[more info](#)]

# Pick resources to search (2)

 <b>MetaQuest</b>	<b>HOME</b>		
	<a href="#">Search</a>	<a href="#">End Session</a>	<a href="#">Home</a>
		<a href="#">Results Summary</a>	<a href="#">Results List</a>

[Send Feedback](#)

[My Resource List](#)

[All Resources](#)

- [Archives & Manuscripts](#)
- [Art & Architecture](#)
- [Business & Management](#)
- [Classical Studies](#)
- [Communication](#)
- [Computer Science](#)
- [Current News](#)
- [Economics](#)
- [Education](#)
- [Ethnic Studies](#)
- [Gender Studies](#)
- [General Reference](#)
- [History](#)
- [Humanities: General](#)
- [Language/Literature:Eng & Amer](#)
- [Language/Literature:European](#)
- [Law](#)

**Welcome to Boston College's MetaQuest**, a gateway to research resources. Use MetaQuest to:

- search up to eight databases and library catalogs
- create a personalized My Resources list (use [Locate My Resources](#))
- save, e-mail and download search results
- link directly to databases and catalogs

**To begin**, do one of the following:

- pick a research area from the list on the left to filter resources
- click on "Locate My Resources" at the top to identify resources
- click **All Resources** to browse a list of all resources

**For help** with MetaQuest and with your research see:

Pre-configured  
“research areas”



# Pick resources to search (3)

	<a href="#">End Session</a>	<a href="#">Home</a>	<a href="#">Locate My Resources</a>	
<a href="#">Search</a>	<a href="#">Results Summary</a>	<a href="#">Results List</a>	<a href="#">History</a>	

---

Field to search:  Type word or phrase:

And  Or  Not

**Search Multidisciplinary resources using MetaQuest:**

<input checked="" type="checkbox"/> <a href="#">ArticleFirst (OCLC)</a>	<input checked="" type="checkbox"/> <a href="#">BC Libraries Catalog: Quest</a>
<input checked="" type="checkbox"/> <a href="#">Dissertation Abstracts (OCLC)</a>	<input checked="" type="checkbox"/> <a href="#">Electronic Collections (OCLC)</a>
<input checked="" type="checkbox"/> <a href="#">Expanded Academic ASAP (Gale)</a>	<input checked="" type="checkbox"/> <a href="#">FRANCIS (RLG)</a>
<input checked="" type="checkbox"/> <a href="#">General Reference Center(Gale)</a>	<input checked="" type="checkbox"/> <a href="#">NetFirst (OCLC)</a>

**Link to Multidisciplinary resources (not searchable using MetaQuest):**

<a href="#">American Periodicals Series</a>	<a href="#">BC Electronic Journals</a>
<a href="#">Cambridge Journals Online</a>	<a href="#">CatchWord</a>
<a href="#">EBSCO Online</a>	<a href="#">Early English Books (PQ)</a>

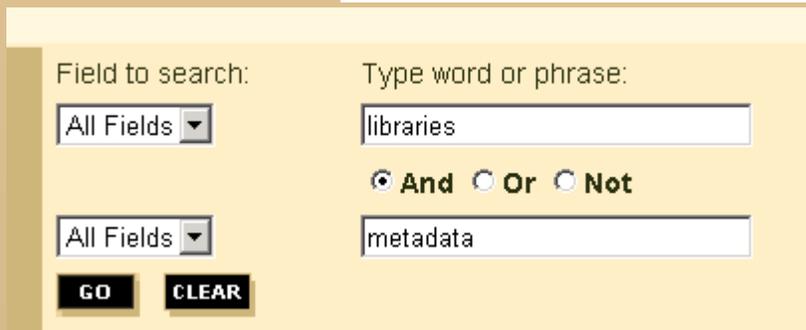
# Enter query

- Implementers can choose how “simple” to make it
- Usually choose to limit options because
  - not all resources support the same fields (or indeed any fields)
  - evidence shows students use keyword search



Keyword(s):

[Search Tips](#)



Field to search:  Type word or phrase:

And  Or  Not



MetaQuest Quick Search

Search for:

# Wait for initial results

You searched for **frank lloyd wright**

ArticleFirst	Search Failed	
Encyclopedia Britannica online	Searching	
Art Full Text	Searching	
Avery Index	<a href="#">50 Hits</a>	
MLA Bibliography	<a href="#">16 Hits</a>	

Later ...

You searched for **frank lloyd wright**

[Merge/Show All Articles](#)

ArticleFirst	Search Failed	
Encyclopedia Britannica online	No Hits	
Art Full Text	<a href="#">50 Hits</a>	
Avery Index	<a href="#">50 Hits</a>	
MLA Bibliography	<a href="#">16 Hits</a>	

To view search results by database, click the database name on tab.

<a href="#">ArticleFirst (OCLC)</a>	<a href="#">BC Libraries Catalog: Quest</a>	<a href="#">Dissertation Abstracts (OCLC)</a>	<a href="#">Electronic Collections (OCLC)</a>	<a href="#">Expanded Academic ASAP (Gale)</a>
<a href="#">FRANCIS (RLG)</a>	<a href="#">General Reference Center(Gale)</a>	<a href="#">NetFirst (OCLC)</a>		
Database	Status	Hits		
ArticleFirst (OCLC)		19		
BC Libraries Catalog: Quest		5		
Dissertation Abstracts (OCLC)		6		
Electronic Collections (OCLC)		38		
Expanded Academic ASAP (Gale)		26		
FRANCIS (RLG)		118		
General Reference Center(Gale)		15		
NetFirst (OCLC)		1		

# Results

- Organized by resource
- Limited number of hits per resource
- Option to jump to records for one resource before all have returned results
- Option to merge results
  
- Products provide flexibility for configuration
- Tests did not explore configuration options and tools
- Configuration and customization is resource-intensive even with good tools.

# List of short records

[Send Feedback](#)

[Save](#)
[E-Mail](#)
[Add to My e-Shelf](#)
[Refine](#)
[Merge](#)

Any word=(libraries) AND Any word=(metadata)

Records 1- 10 of 19

Jump to:  [Go](#) [Previous](#) [Next](#)

[NetFirst \(OCLC\)](#)
[ArticleFirst \(OCLC\)](#)
[BC Libraries Catalog: Quest](#)
[Dissertation Abstracts \(OCLC\)](#)
[Electronic Collections \(OCLC\)](#)  
[Expanded Academic ASAP \(Gale\)](#)
[FRANCIS \(RLG\)](#)
[General Reference Center\(Gale\)](#)
[SELECTED](#)

#		Author	Title	Year	Resource
1	<a href="#">MORE</a>	<input type="checkbox"/> Deacon, Prue	<a href="#">Using metadata to create navigation paths in the HealthInsite Internet gateway</a>	2001	<a href="#">ArticleFirst (OCLC)</a>
2	<a href="#">MORE</a>	<input type="checkbox"/>	<a href="#">Metadata and the Dublin Core: Emerging Standards for Digitization Projects.</a>	1998	<a href="#">ArticleFirst (OCLC)</a>
3	<a href="#">MORE</a>	<input type="checkbox"/> Gilliland-Swetland, Anne	<a href="#">Digital preservation and metadata: history, theory, practice - by Susan H. Lazingar. Englewood, CO: libraries</a>	2002	<a href="#">ArticleFirst (OCLC)</a>
4	<a href="#">MORE</a>	<input checked="" type="checkbox"/> Tennant, Roy	<a href="#">INFOTECH - Digital Libraries - Metadata As If Libraries Depended on It</a>	2002	<a href="#">ArticleFirst (OCLC)</a>

# Selected record

<b>Record 1 of 1</b>	
<b>Choose format:</b>	<a href="#">MetaQuest Record</a> <a href="#">Original Record</a>
	<a href="#">ADD TO e-SHELF</a> <a href="#">SAVE</a> <a href="#">E-MAIL</a> <a href="#">SFX</a>
<b>Resource</b>	◆ <a href="#">ArticleFirst (OCLC)</a>
<b>Title</b>	◆ <a href="#">INFOTECH - Digital Libraries - <b>Metadata</b> As If Libraries Depended on It</a>
<b>Author</b>	◆ <a href="#">Tennant, Roy</a>
<b>Citation</b>	Library journal. 127, no. 7, (2002): 32
<b>YEAR</b>	2002
<b>ISSN</b>	0363-0277
<b>IDNumber</b>	0363-0277(2002)127:7<32:I-DL-M>2.0.TX;2-M
<b>Imprint</b>	New York, NY [etc.] : Library Journal [etc.]
<b>Description</b>	2
	<a href="#">ADD TO e-SHELF</a> <a href="#">SAVE</a> <a href="#">E-MAIL</a> <a href="#">SFX</a>

# Services via OpenURL

- Click on SFX button
- Services include full text

Record 1 of 1

Choose format:

[MetaQuest Record](#)

[Original Record](#)

[ADD TO e-SHELF](#) [SAVE](#) [E-MAIL](#) [SFX](#)

Resource	<a href="#">ArticleFirst (OCLC)</a>
Title	<a href="#">INFOTECH - Digital Libraries - Metadata As If Libraries</a>
Author	<a href="#">Tennant, Roy</a>
Citation	Library journal. 127, no. 7, (2002): 32
YEAR	2002
ISSN	0363-0277
IDNumber	0363-0277(2002)127:7<32:I-DL-M>2.0.TX;2-M
Imprint	New York, NY [etc.] : Library Journal [etc.]
Description	2

[ADD TO e-SHELF](#) [SAVE](#) [E-MAIL](#) [SFX](#)

SFX by Ex Libris (USA) Inc. - Microsoft Internet Explorer

### SFX Services for this record

**Title** INFOTECH - Digital Libraries - Metadata As If Libraries  
Depended on It

**Source** LIBRARY JOURNAL [0363-0277]  
yr: 2002 vol: 127 iss: 7 pg: 32

[Link to full text from Business Source Premier](#)  
year:  volume:  issue:  start page:

[Link to full text from Expanded Academic ASAP](#)  
year:  volume:  issue:  start page:

[Check Holdings in BC's Library Catalog, Quest](#)

[Send Questions or Comments about SFX to a BC Librarian](#)

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© 2002 SFX by Ex Libris (USA) Inc.  
[CrossRef](#) Enabled

# To full text

[Close Window](#)

[Print](#)

[E-mail](#)

[Save](#)

**Title:** Metadata As If Libraries Depended on It.

**Subject(s):** METADATA; DUBLIN Core; METADATABASES; MARC formats; DIGITAL libraries

**Source:** Library Journal, 4/15/2002, Vol. 127 Issue 7, p32, 2p, 1bw

**Author(s):** Tennant, Roy

**Abstract:** Discusses the use of metadata in digital library work. Definition of metadata; How excellent metadata is constructed; Use of containers for metadata; Importance of solving a problem people care about; Various containers that can be used, including MARC, the Dublin Core, Metadata Encoding and Transfer Syntax (METS), and Metadata Object Description Schema (MODS); Need for metadata containers to qualify information; Importance of guidelines on how containers should be used.

**AN:** 6542603

**ISSN:** 0363-0277

**Database:** Business Source Premier

**Text Available:** [Full Page Image](#)

Section: Commentary

[Locate My Resources](#) [My Profile](#) [Back](#)

[History](#) [My e-Shelf](#) [Help](#)

[BACK](#)

SFX by Ex Libris (USA) Inc. - Microsoft Internet Explorer

**SFX Services for this record**

**Title** INFOTECH - Digital Libraries - Metadata As If Libraries Depended on It

**Source** LIBRARY JOURNAL [0363-0277]  
yr: 2002 vol: 127 iss: 7 pg: 32

Link to full text from **Business Source Premier**  
year:  volume:  issue:  start page:

Link to full text from **Expanded Academic ASAP**  
year:  volume:  issue:  start page:

Check Holdings in **BC's Library Catalog, Quest**

Send Questions or Comments about SFX to a **BC Librarian**

Get the **SFX Frequently Asked Questions**

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# Another list of short records

Library Gateway	CU Catalog	Go Back	New Search	Help
-----------------	------------	---------	------------	------

You searched for **frank lloyd wright**  
No Previous Hits | No Next Hits

**Title:** [21 for the 21st Century. Our 21-Young-Gun Salute to the best designers working today is also something of a design forecast. These under-40 breakout mavericks, virtually all of them trained in more than one discipline, will reach career maturity in the decades to come. From this group will come the Philippe Starcks and Terence Conrans--perhaps even a Mies van der Rohe or Frank Lloyd Wright--of the future.](#)

**Author(s):** Bernstein, Fred A.  
**Source:** *Metropolitan home.*, 31, no. 2, (March 01, 1999): 59  
**Document Type:** a

[From ArticleFirst (OCLC Web : 1990- ) ]

**Title:** [A Peace of Wood. For their first house, a city-based architect and food stylist built a modest home that draws inspiration from Shaker and Japanese roots, as well as the lessons of Frank Lloyd Wright.](#)

**Author(s):** Kessler, Brad  
**Source:** *Metropolitan home.*, 31, no. 4, (July 01, 1999): 150  
**Document Type:** a

[From ArticleFirst (OCLC Web : 1990- ) ]

**Title:** [ARCHITECTURE - BAGDAD - Dans les annees 50, l'architecte americain Frank Lloyd Wright avait concu un projet d'urbanisme grandiose pour moderniser la ville.](#)

**Author(s):** Marefat, Mina  
**Source:** *Beaux arts magazine.*, no. 233, (2003): 68  
**Document Type:** a

[From ArticleFirst (OCLC Web : 1990- ) ]

# Select record

[Previous](#) | [Next](#)

Title: Frank Lloyd Wright: Architect  
Author/Creator: Reed, Peter  
Riley, Terence  
Source: **Modernism/Modernity**, 1, no. 3 (1994): 266  
Language: English

[Find it at  
Cornell](#)

Search  
[ArticleFirst  
\(OCLC Web  
: 1990- \)](#)  
Directly

- Find it at Cornell => OpenURL resolver
- Option to go to native interface for resource

# Services via OpenURL

**Find It At Cornell** 

Offers searches of library catalog for electronic and print journals and books. Links to online full text when available. [Help](#)

**Citation Information** [Edit Citation](#)

**Article Title:** Frank Lloyd Wright: Architect

**Source:** Modernism/Modernity (1071-6068); Volume: 1; Issue: 3; Date: 1994

**Cornell University Online Catalog**

[Find this Journal at Cornell \(by ISSN\)](#)

[Find this Journal at Cornell \(by Title\)](#)

**Links to Full Text, Abstracts, Journals, etc.**

journal [John Hopkins University Press](#)

- Depending on target, link may be to journal or issue rather than article

# To journal title



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SEPTEMBER 2002  
MODERNISM / modernity  
1071-6068  
How and why did modernism change culture?

Free Sample Issue

### Modernism/modernity

E-ISSN: 1080-6601 Print ISSN: 1071-6068  
Publisher: The Johns Hopkins University Press

Concentrating on the period extending roughly from 1860 to the present, Modernism/Modernity focuses on the methodological, archival, and theoretical exigencies particular to modernist studies. It encourages an interdisciplinary approach linking music, architecture, the visual arts, literature, and social and intellectual history. The journal's broad scope fosters dialogue between social scientists and humanists about the history of modernism and its relations to modernization. Each issue features a section of thematic essays as well as book reviews and a list of books received. Modernism/Modernity is now the official journal of the Modernist Studies Association.

### JOURNAL COVERAGE:

Vol. 1 (1994) through current issue

Select a Volume

-----

### GENERAL INFORMATION

Select a Section

# More lessons

- OpenURL-enabled links to full text were the most uniformly popular functionality
- Ease and flexibility of administration should be important selection factor in a federated search product
- Configuration will be resource-intensive, but could yield great benefits.
- Need to think carefully
  - about information tasks
  - about user groups
  - LC is not a university

# A final note: personalization and customization

- Not easily tested during trial period
- Personalization (by users)
  - to whom will this be useful
  - will the frequent (presumably expert) user actually want to use federated search?
  - requires login and/or cookies
- Customization (for groups, by librarians)
  - The potential to pre-select groups of resources appealed to LC reference specialists during testing
  - CRS specialists did not find benefit in federated searching, but do want customization for groups of specialist analysts. Another type of “portal application” has been acquired by CRS to support them.