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

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)

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]
Welcome to Boston College's MetaQuest, a gateway to library resources. Use MetaQuest to:

- search up to eight databases and library catalogs
- create a personalized My Resources list (use the menu on the left)
- 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 find needed resources
- click on "Locate My Resources" at the top to identify your own resources
- click **All Resources** to browse a list of all resources

For help with MetaQuest and with your research see: [link]
Pick resources to search (3)

<table>
<thead>
<tr>
<th>Field to search:</th>
<th>Type word or phrase:</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Fields</td>
<td>libraries</td>
</tr>
<tr>
<td>And Or Not</td>
<td></td>
</tr>
<tr>
<td>All Fields</td>
<td>metadata</td>
</tr>
</tbody>
</table>

**Search Multidisciplinary resources using MetaQuest:**
- ArticleFirst (OCLC)
- Dissertation Abstracts (OCLC)
- Expanded Academic ASAP (Gale)
- General Reference Center (Gale)
- BC Libraries Catalog: Quest
- Electronic Collections (OCLC)
- FRANCIS (RLG)
- NetFirst (OCLC)

**Link to Multidisciplinary resources (not searchable using MetaQuest):**
- American Periodicals Series
- Cambridge Journals Online
- EBSCO Online
- BC Electronic Journals
- CatchWord
- Early English Books (PQ)
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
Wait for initial results

You searched for frank lloyd wright

Later …

You searched for frank lloyd wright

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

<table>
<thead>
<tr>
<th>Database</th>
<th>Status</th>
<th>Hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>ArticleFirst (OCLC)</td>
<td></td>
<td>19</td>
</tr>
<tr>
<td>BC Libraries Catalog: Quest</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Dissertation Abstracts (OCLC)</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Electronic Collections (OCLC)</td>
<td></td>
<td>38</td>
</tr>
<tr>
<td>Expanded Academic ASAP (Gale)</td>
<td></td>
<td>26</td>
</tr>
<tr>
<td>FRANCIS (RLG)</td>
<td></td>
<td>118</td>
</tr>
<tr>
<td>General Reference Center (Gale)</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>NetFirst (OCLC)</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>#</th>
<th>Author</th>
<th>Title</th>
<th>Year</th>
<th>Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Deacon, Prue</td>
<td>Using metadata to create navigation paths in the Healthinsite Internet gateway</td>
<td>2001</td>
<td>ArticleFirst (OCLC)</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Metadata and the Dublin Core: Emerging Standards for Digitization Projects</td>
<td>1999</td>
<td>ArticleFirst (OCLC)</td>
</tr>
<tr>
<td>3</td>
<td>Gilliland-Swetland, Anne</td>
<td>Digital preservation and metadata: history, theory, practice - by Susan H. Lazinger, Englewood, CO: libraries</td>
<td>2002</td>
<td>ArticleFirst (OCLC)</td>
</tr>
<tr>
<td>4</td>
<td>Tennant, Roy</td>
<td>INFOTECH - Digital Libraries - Metadata As If Libraries Depended on It</td>
<td>2002</td>
<td>ArticleFirst (OCLC)</td>
</tr>
</tbody>
</table>
Selected record

| Record 1 of 1 |  |  |
| Choose format: | MetaQuest Record | Original Record |

|  | ADD TO e-SHELF | SAVE | E-MAIL | PDF |

| Resource | ArticleFirst (OCLC) |
| Title | INFOTECH - Digital Libraries - Metadata As If Libraries Depended on It |
| Author | Tennant, Roy |
| Citation | Library Journal. 127, no. 7, (2002) 32 |
| YEAR | 2002 |
| ISSN | 0363-0277 |
| Imprint | New York, NY [etc.] : Library Journal [etc.] |
| Description | 2 |
Services via OpenURL

- Click on SFX button
- Services include full text
Title: Metadata As If Libraries Depended on It

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


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
Another list of short records

| 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 années 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

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 => 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.

Citation Information

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
Modernism/Modernity

E-ISSN: 1060-6601 Print ISSN: 1071-6068
Publisher: The Johns Hopkins University Press

Concentrating on the period extending roughly from 1850 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.
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.