

## Topical Discussion Group 7: What Steps Can the Library Take to Achieve Integrated Access to the Catalog and Other Discovery Tools?

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**Recorder:** Andrew Lisowski, Library of Congress

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### The Assignment

The Topical Discussion Group (**TDG**) was asked to recommend specific steps that academic, research, and national libraries could take towards achieving integrated access to the catalog and other discovery tools in the networked environment. The TDG considered the Conference papers "The Library Catalog as Portal to the Web," by Sarah Thomas, and "The Library Catalogue in a Networked Environment," by Tom Delsey.

### Recommendations

Sherry Vellucci said that at the outset, the TDG saw the need for a common working *definition* of "the library catalog" and adopted the following: the catalog is "a tool for access and controlled descriptions of physical and virtual resources." The TDG believed that the *goal* of catalog development should be to "create a definable access framework for integration," which the discussion group preferred to call a gateway as distinct from a portal. The group made the following recommendations:

- 7.1. Encourage research on user needs and approaches in order to develop user tools for customization. A critical specific step is to:
  - 7.1a. Find out what users want.
- 7.2. Improve and encourage the adoption of protocols and profiles to enhance the ability to search and retrieve across a range of discovery tools, such as:
  - A&I (abstracting and indexing) services
  - Other content databases
  - Other catalogs
- 7.3. Support research and development to improve controlled vocabulary mediating tools. Prof. Vellucci said that in a networked environment, "Authority control is not only wonderful, but critical." The controlled vocabulary mediating tools should cover:
  - Subjects
  - Genres
  - Gazetteers
  - Names and titles
  - Etc.

- 7.4. Work with vendors and information providers to improve access mediation. Specific areas for attention include:
  - 7.4a. User authentication for access and rights management
  - 7.4b. Appropriate copy, and providing the user with a pathway to it
  - 7.4c. Reference linking, e.g. between the catalog and abstracting and indexing services.
  
- 7.5. Improve the quantity and quality of metadata. Specific steps include:
  - 7.5a. Develop partnerships with information providers.
  - 7.5b. Encourage development and adoption of standards.
  - 7.5c. Leverage role of national libraries to expand metadata exchange for cooperative enrichment and improved interoperability.
  
- 7.6. The Working Group encourages the research and development of new models for integration, including the event-aware model discussed by Carl Lagoze. Existing models for an integrated approach to access include:
  - Replicated description
  - Distributed searching
  - Supercatalog (Harvesting)
  - Follow-on search (SFX)

Prof. Vellucci noted, “Metadata creation is cyclical ... many people can be involved in the development and creation of a record.”

## **Post Conference Comments from Participants**

From Mary Woodley: “... I think that the group felt that the library OPAC could not nor should not serve as the ‘gateway’ to ... all the networked information available. Rather, a ‘framework’ or set of protocols be created within which the library’s OPAC, A&I services, content databases, and other catalogs could be accessed. Because ‘gateway’ and ‘portal’ are terms that have been used to mean so many different things, the group decided to avoid using them. However, if we provide a definition for ‘gateway,’ this may be more readily understandable to readers than the term ‘framework.’”

From Andy Lisowski, Recorder: “... I would note that enhancements to the front-end retrieval interface to provide improved access were discussed at some length. This topic is covered to an extent by TDG7.1 and is touched on in TDG7.4. One specific enhancement that was discussed by the group, but not brought out in the summary, is the need for an ability to conduct non-textual searching for items such as music and images. This was expressed as ‘Search by type (non-textual searching)–music, image, sound, GIS’ in our flipcharts. [See below.]”

## **Transcript from Flipcharts of Brainstorming (prepared by Andy Lisowski, Recorder)**

### **Catalog Definition:**

Access to and controlled descriptions of physical and virtual resources managed by the ILS.

### **Assumptions About the Catalog:**

1. Consistency in description.
2. Predictability in results.
3. Trust in credibility of resources.
4. Aggregator.

### **Characteristics of the Catalog:**

Tool.

Gateway.

Portal.

Traditional bucket.

Broader bucket.

Traditional catalog–tool for access/controlled description/resource discovery.

Data stores.

The catalog (OPAC) is [only] one resource.

### **Goal: Integrated Access**

### **Four Models for Achieving Integration**

Investigate models such as:

1. Replicated Description
2. Distributed Searching
  - Searching over multiple databases using HTTP, Z39.50, or other standard protocol.
  - Client to server.
3. Supercatalog
  - Harvesting index data from multiple sources
  - (Frequency of harvesting)
  - Mapping into common metadata schema
  - Applying a search engine.
  - Search engine follows links back to originating database(s)
4. Follow-on Searching

Asks user if search should continue.  
Knows to which databases you or institution have access.  
Can formulate a search based on retrieved resource.

### **Catalog/Web Retrieval Interface Enhancements**

High level searching using common metadata.  
Weblist  
Improved access from within traditional catalog.  
User customization /personalization.  
Controlled vocabularies.  
Reference online 24/7.  
Resource reserve  
Wireless.  
Authentication of user.  
Appropriate copy problem.  
Alert service--external and internal--push technology--document delivery.  
Interface that will provide "more like this".  
Cross-domain retrieval  
Customization by source.  
Search by type (non-textual searching)--music, image, sound, GIS.  
Linking to related descriptions.  
Resource Reserve.

### **Controlled Vocabulary/Authority Control**

Searching in an uncontrolled world/web.  
Name authorities/format.  
Multiple terminologies.  
Deduping.  
Authority control on-the-fly.  
Stored searches.  
Search normalization.  
Access to thesauri before search.  
Gazetteer tools.  
Languages/scripts

### **Integrating Resources**

Everything that is not in the catalog.  
Specialized domains.  
Linked resources (856 field).  
Other resource discovery tools.

Consortia/virtual union catalog.

Vendors/Service providers.

Broadcast searching.

Internal integration.

Categories

1. What resources to integrate?
2. Role of the catalog.
3. What steps to provide the integrated access?

### **Partnerships**

Rights and access management.

Development of search protocols, A&I profiles, search engines.

Prompt to add metadata to provide resource discovery.

Tools to reformat.

Metadata on performance of resource.

Distribute ILS/Z39.50 client outside library

Encourage adoption of Z39.50.

Vendor-supplied enhancements.

E-commerce.

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