# Power-searching the "3-click" world

# A federated search solution for clients at the University of Pretoria

Ina Smith and Sunette Steynberg CSIR, 26 – 27 July 2006



# **Agenda**

- Client needs and e-strategy (Sunette Steynberg)
- Evaluation of different Search Engines and Link Resolvers

(Ina Smith)

• GoogleScholar<sup>TM</sup> & Scholar SFX<sup>TM</sup> (Ina Smith)



#### Who are our clients?

#### The Net Generation

- Generation raised with computers (Don Tapscott)
- Young people familiar and comfortable with computer and digital technologies



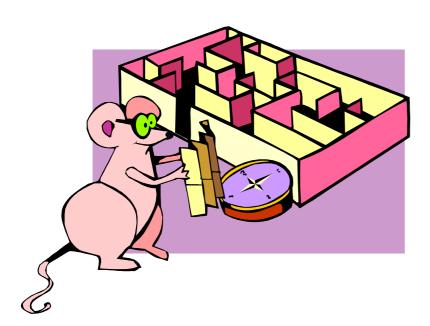
# The Net Generation (2)

- Dependent on Google
- Library resources difficult to figure out
- Library resources outside their environment
- Libraries cannot substantiate digital information



# The Net Generation (3)

- Prefer Google to library searches
- Want speedy answers and full gratification immediately





# OCLC report – 2005

- Understand interests, habits and behaviours using libraries
- Use search engines
- Satisfied with searches
- Self-serve
- Do not differentiate; trust both search engines and libraries



#### What are their needs?

# "Only librarians like to search; everyone else likes to find."

- Roy Tennant -



# Adapt or die ...

- Why adapt?
- Client-service business model
- Library services not satisfactory loss of relevance
- Learn from clients what they want



#### **Answer**

- How students have grown up
- Blend technology, clients, academy
- Result enriching education
  - lifelong learning



# LIBQUAL

LIBQUAL is a suite of services that libraries use to solicit, track, understand and act upon users' opinions of service quality.

- Web based program
- Developed by ARL



# The e-Strategy

- GAELIC report 2005
- 50% e-books by 2010
- 100% e-journals by 2010
- Good and fast access



# A service that fulfil in all these requirements could be built, but would it necessarily be used for core functions?



#### **Fulfil needs of clients**

- Single search engine
- Easy to use
- Search databases, e-journals and catalogue simultaneously



# Distinguishing between Search Engines



**Robot-driven for WWW pages** 







Federated Meta Search for e-Resources

+ Link Resolver







# Federated Search Engine

- Global search OR Meta Search OR Broadcast Search
- Same-time searches of different e-resources
- Single searchable point
- Blends:
  - E-journals, library catalogue, subscription databases,
     e-print collections, digital repositories, web pages
- Examples: MAPMetafind (Innovative), MetaLib (Ex Libris), SIRSI



#### **Link Resolver**

- Connects references with full text
- Essential for optimal usage of Federated Search Engine
   & e-resources
- Examples: WebBridge (Innovative), SFX (ExLibris)



# **Advantages**

- Single one-stop searching point
- Save time
- Less training needed
- Immediate access to full text via link resolver
- Utilise very expensive databases
- Partially address client needs identified



# **Evaluation of Federated Search Engines & Link Resolvers**

- Importance of an evaluation
- Managing the evaluation process
- Commercial Products
- Criteria
- Evaluation Instrument
- Evaluation Process
- Outcomes



## Importance of an Evaluation

(UCE Birmingham Evidence Base 2006)

- Ensure that objectives are met
- Identifying problems & weakness
- Evidence of benefits & impacts
- Securing funding
- Gain support of institutional managers
- Guide future plans
- Develop guidelines useful for other libraries
- Devising strategies to develop projects into services
- Position library



# **Managing the Evaluation Process**



#### **Commercial Products**

- ENCompass & LinkFinder Plus (Endeavor)
- SearchSolver & LinkSolver (Ovid)
- MetaLib & SFX (ExLibris)
- Knowledge Prism & Serial Solutions (WebFeat)
- MultiSearch & Linking Profile (CSA)
- SIRSI
- MAP Metafind & WebBridge (Innovative)



#### **Evaluation Criteria**

- Search functionality
  - E.g. Broadcast searching, Boolean searching
- Search results
  - E.g. Limit results, Download results to bibliographic software
- Interface features
  - E.g. Help options, Customisable interface
- User access
  - E.g. Single sign-on, Secure login
- Vendor support
  - E.g. 24/7, Update frequency of knowledgebase



#### **Evaluation Instrument**

- Expert Review Checklist
- Rating Scale
  - -4 = Excellent
  - -3 = Acceptable
  - -2 = Partially
  - -1 = Poor
  - 0 = Not available/ Cannot evaluate
- Very important criteria \*
- Comments

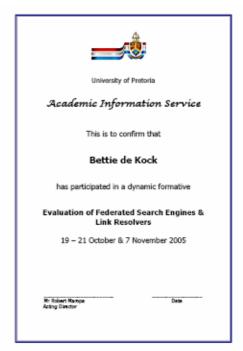
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#### **Evaluation Process**

- Participants from UP, UNISA, CSIR, WITS
- 19 21 October; 7 November 2005
- 7 sessions in total; 28 hours
- Each session:
  - Introduction & Live Internet Demo by Vendor
  - Q&A via telephone conferencing
  - Hands-on Session
- Acknowledgement
- Processing of data
- Feedback via e-mail & blog





#### **Evaluation Outcomes**

- Data from evaluation in MSExcel
- None are fully up to our standards yet
- Limitation of evaluation Information Specialists
- No product purchased up to date
- Interim solution



#### **Interim Solution**





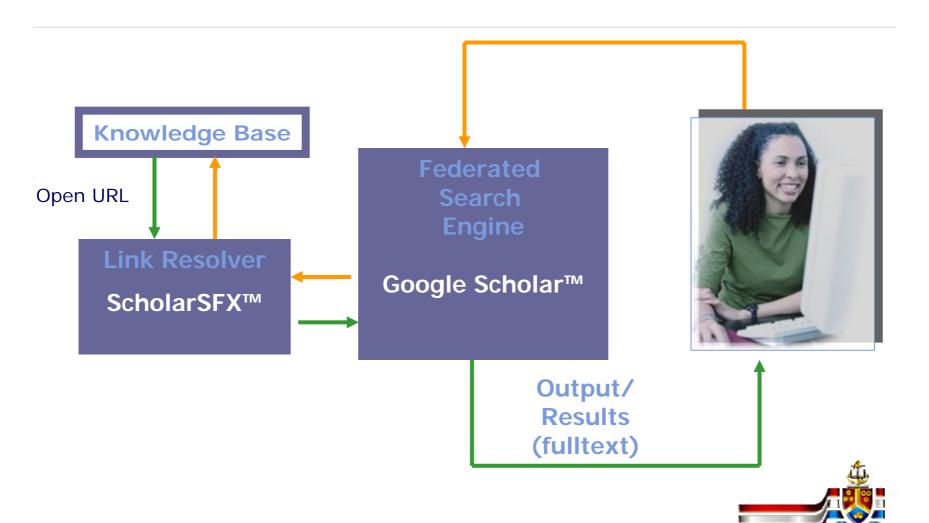




# Federated Search Solution



# Google Scholar™ & ScholarSFX™



University of Pretoria

# eIFL Agreement

- GoogleScholar<sup>TM</sup> as a Federated Search Engine
- ScholarSFX<sup>TM</sup> as a free link resolver
- Also available for member institutions who purchased:
  - SFX (ExLibris)
  - Article Linker (Serials Solutions)
  - TOUResolver (TDNet)
  - LinkSource (EBSCO)
  - WebBridge (Innovative)
  - Sirsi Resolver (Sirsi)
  - 1Cate (Open Informatics)
  - Own link resolvers



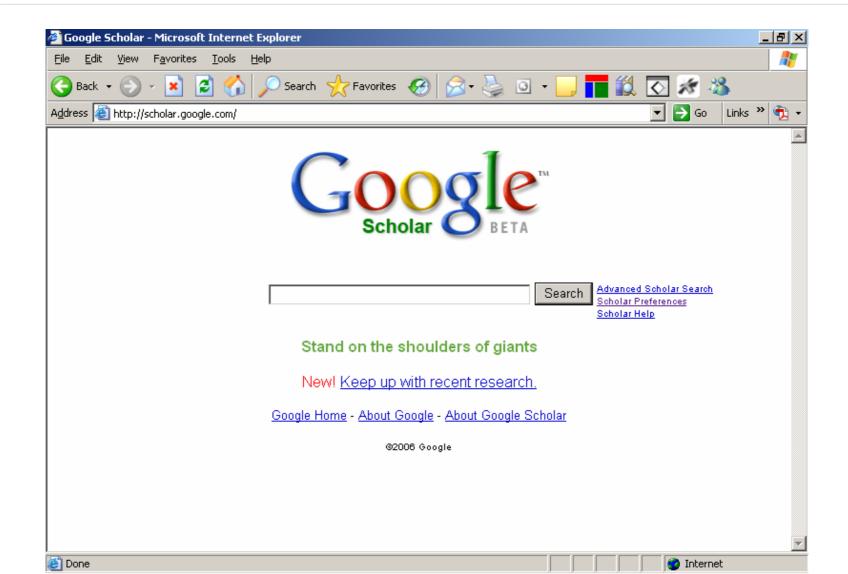
# About Google Scholar™

"Google Scholar provides a **simple way** to **broadly search** for **scholarly literature**. From one place, you can search **across many disciplines and sources**:

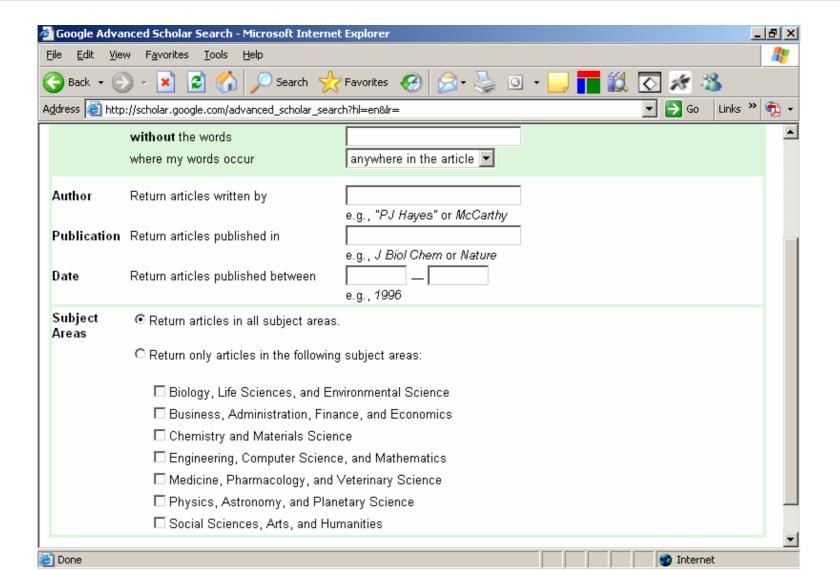
- Peer-reviewed papers,
- Theses;
- Books;
- Abstracts and articles, from academic publishers, professional societies, preprint repositories, universities and other scholarly organizations."

University of Pretoria

#### **Basic Search**

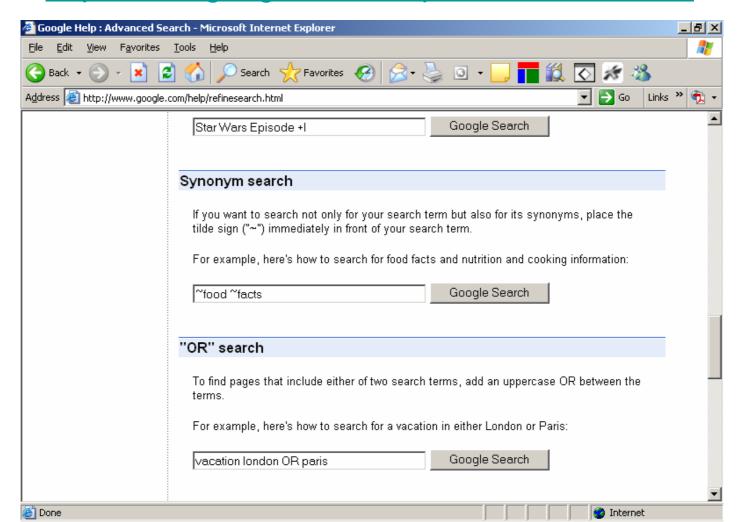


# **Search Subject Areas**



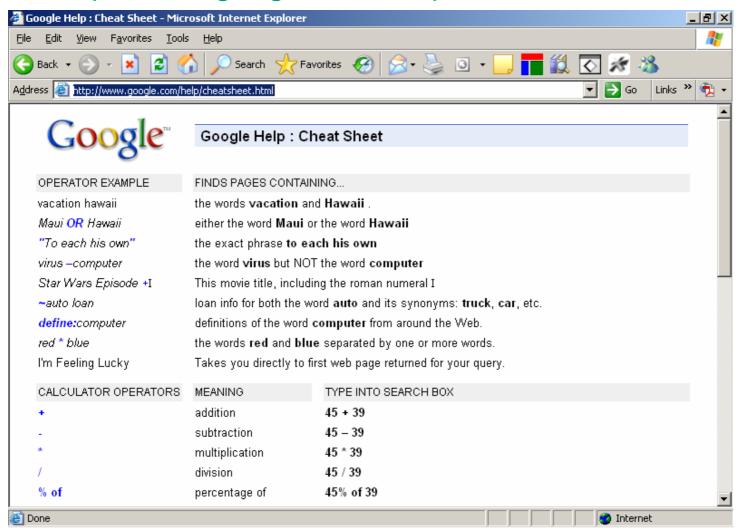
#### **Boolean Searches**

#### http://www.google.com/help/refinesearch.html



## **Google Cheat Sheet**

#### http://www.google.com/help/cheatsheet.html



#### About ScholarSFX™

- Free Service
- For existing SFX Customers and non-customers
- Open URL Link Resolver
- Enables users to link from Google Scholar<sup>™</sup>
  to full text articles that are available through
  local institutional subscriptions & to library catalogue



#### ScholarSFX<sup>™</sup> links client to ...

#### **Definition of a SFX "target":**

"... an **information resource** or **service** which a ... user can view when following a link from Google Scholar™ or an SFX menu".

- Free Full Text, e.g. DOAJ, Free E-Journals
- Aggregators, e.g. Ovid, ScienceDirect
- OPAC (OCLC WorldCat)
- Subscription e-Journals
- **E-books**, e.g. Gutenberg-e, Books 24X7
- **Databases**, e. g. Silverplatter



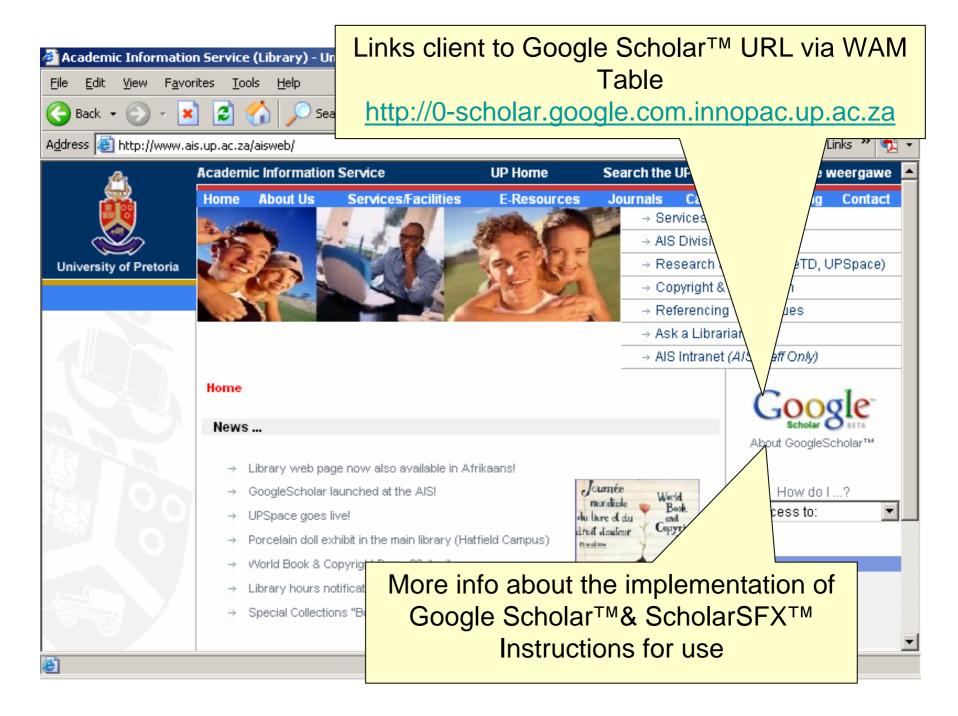
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### Access full text within 3 clicks!

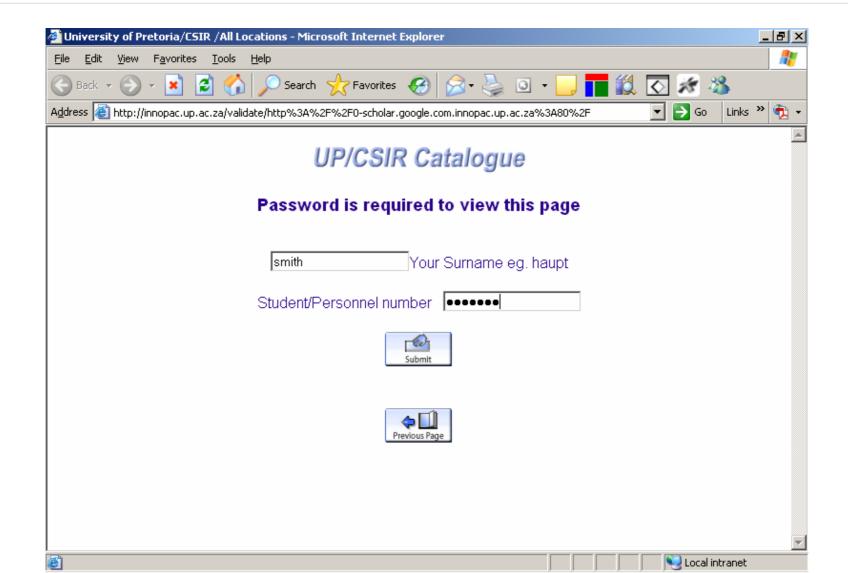
Accessible via Web Access Management Table (Innovative Product) @

http://0scholar.google.com.innopac.up.ac.za

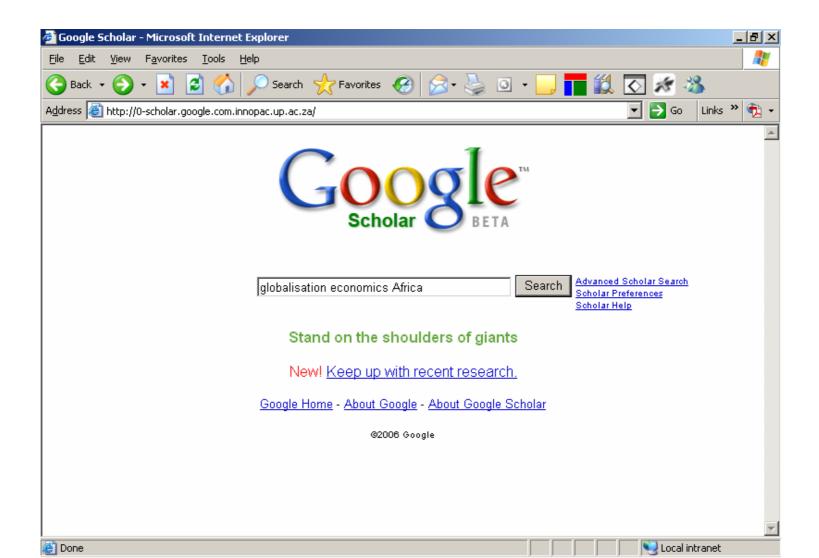




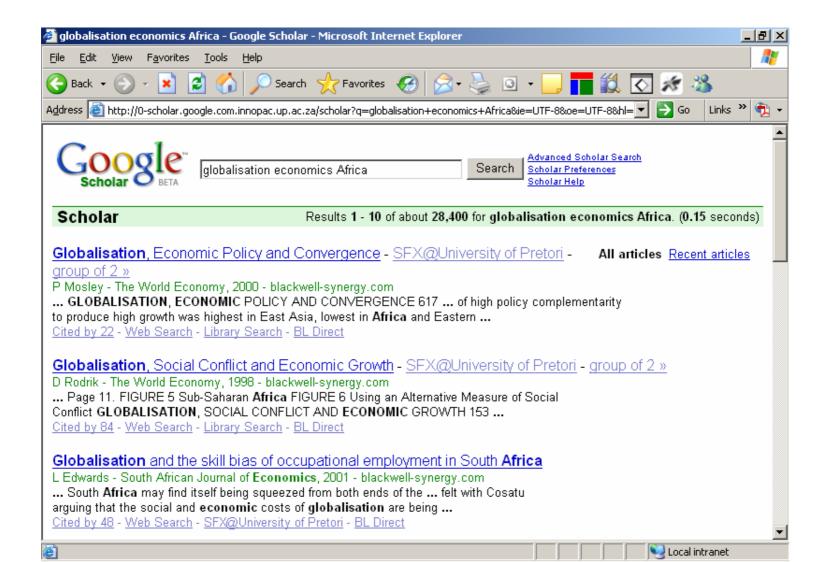
# Access: Authentication (out of library)



#### Access: Search terms



#### Access: References

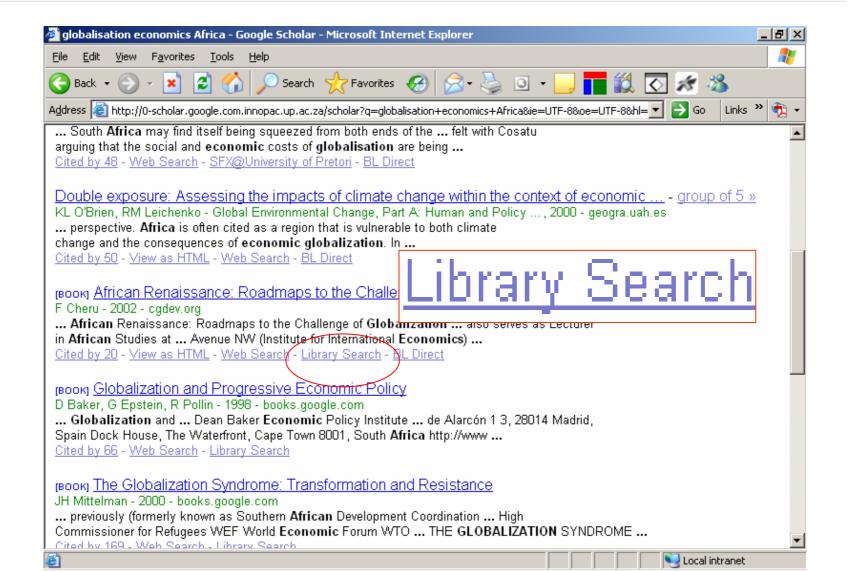


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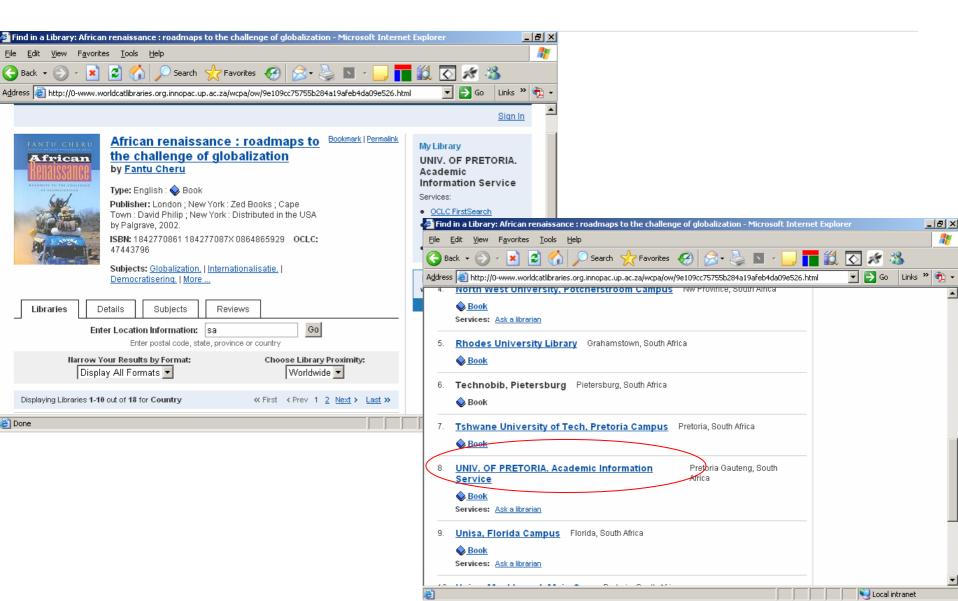
- Library Search to holdings in catalogue
- SFX@University of Pretoria to full text journal articles



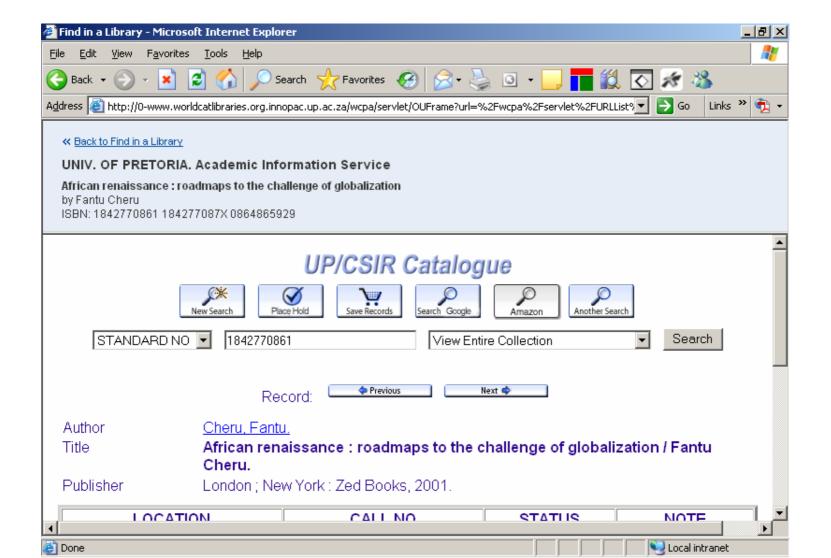
# Access: Link to catalogue

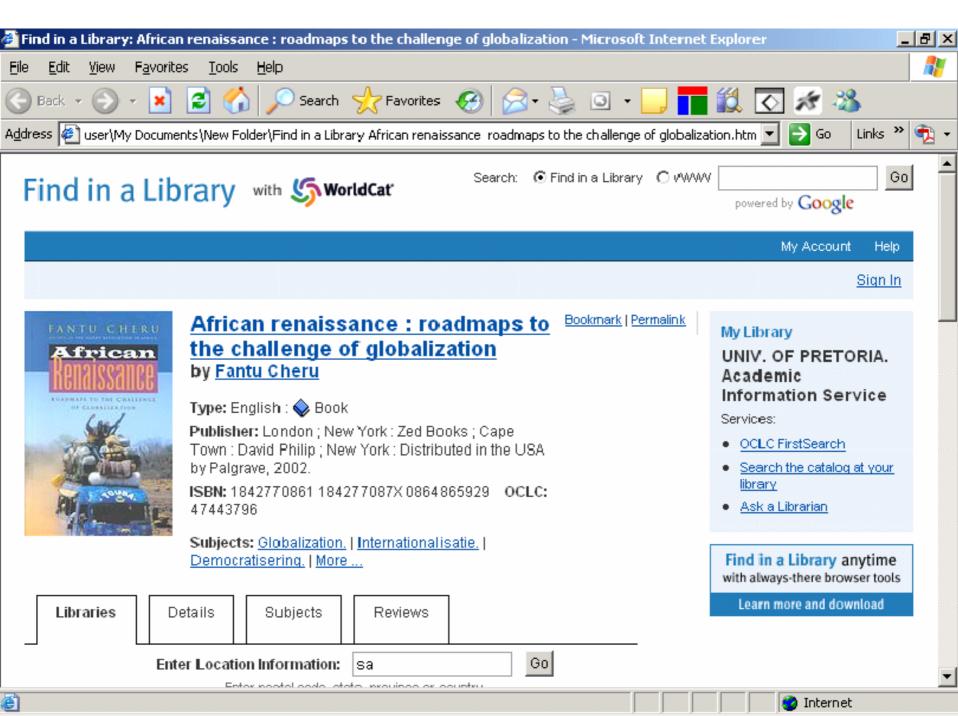


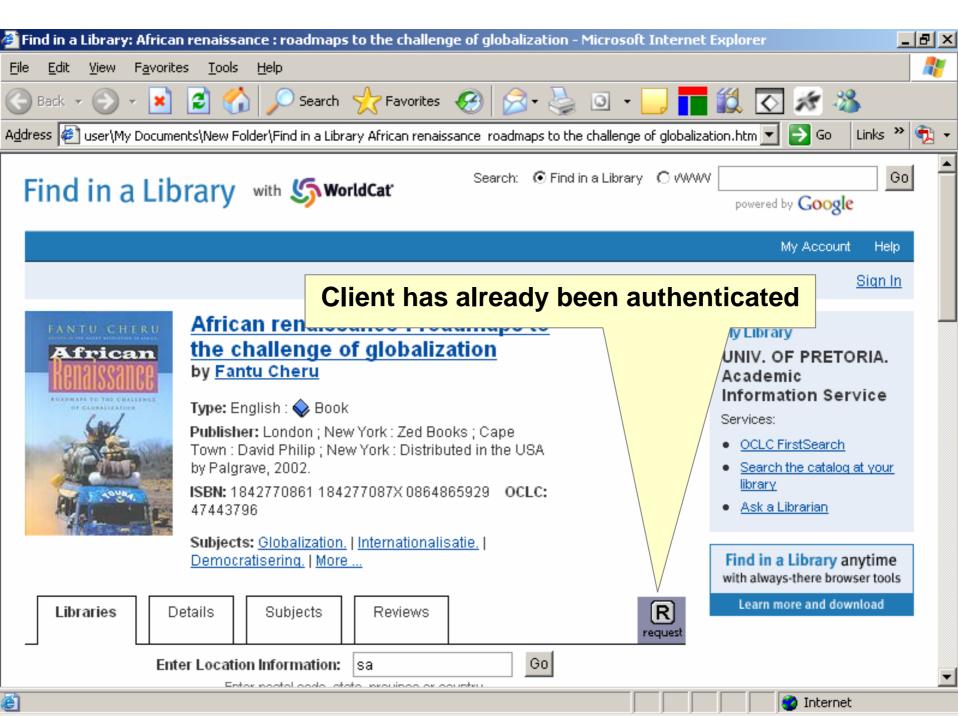
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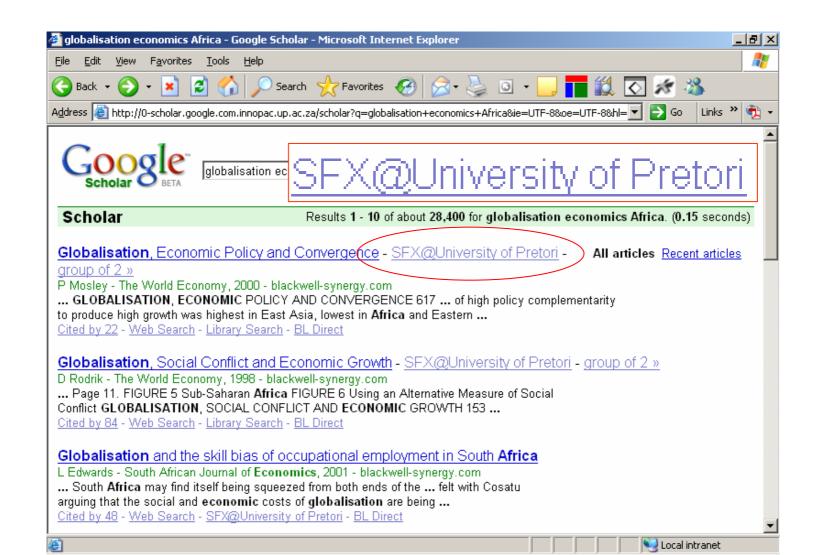
# Access: Catalogue info



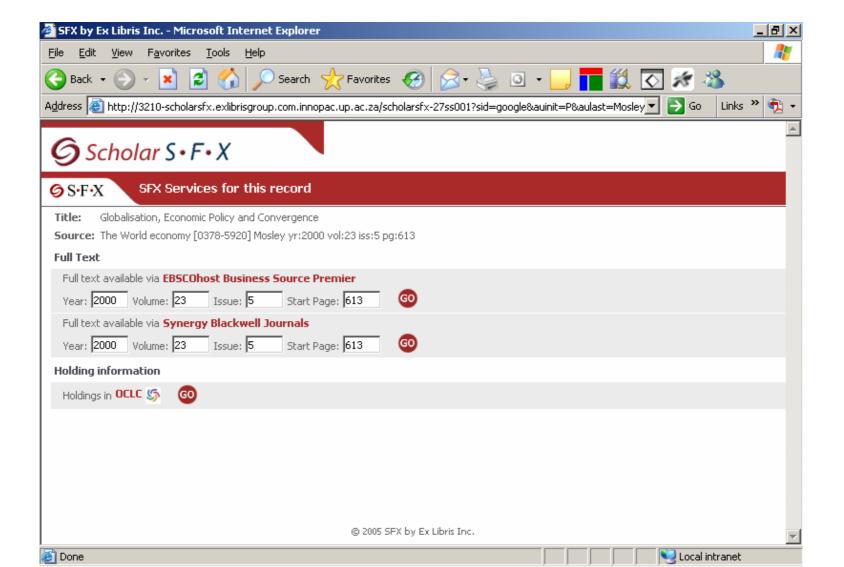




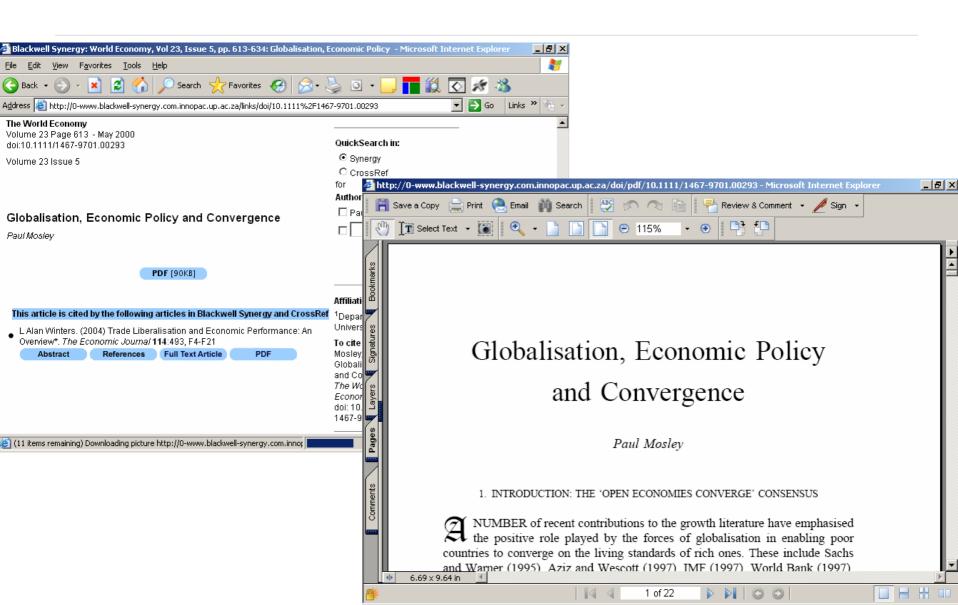
#### Access: Link to article

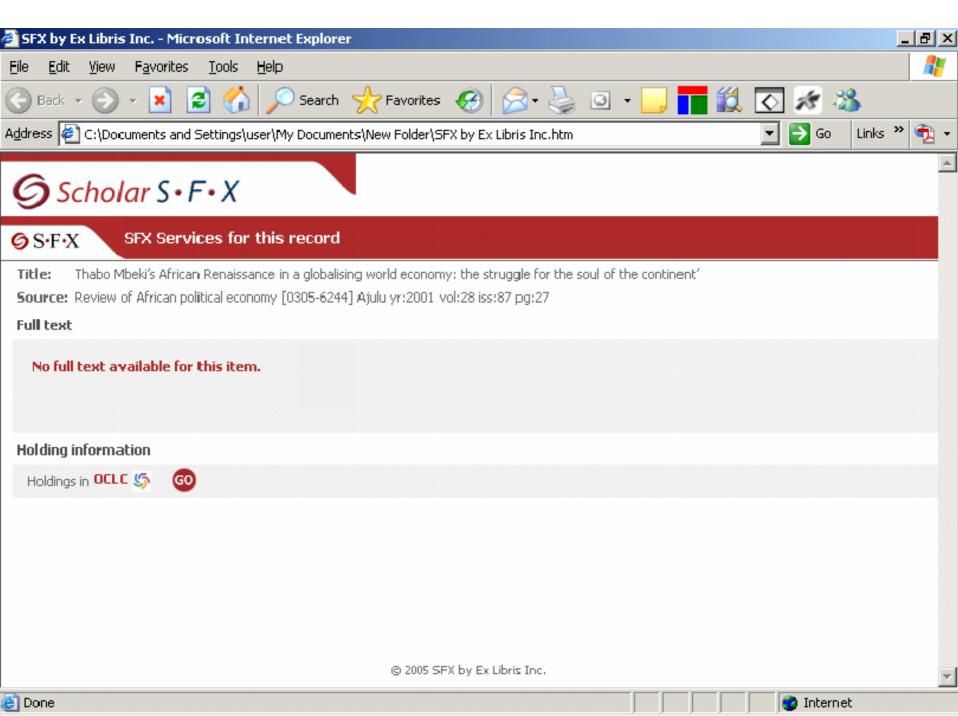


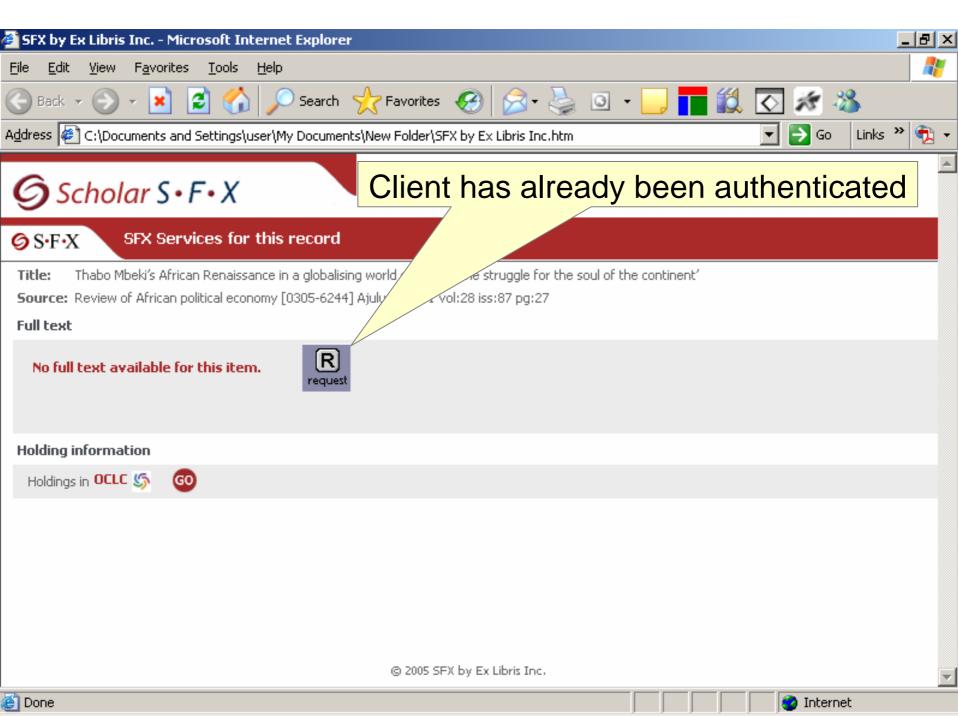
#### Access: Platform



### Access: Download Full text





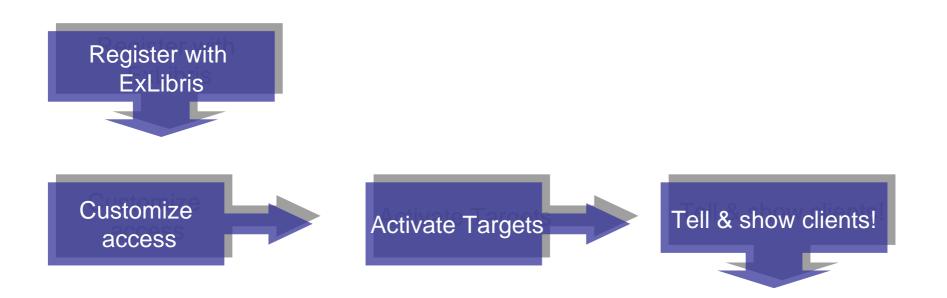


## **Implications**

- Guide Google-users back to valuable high quality library resources
- Increase library presence
- Effective Internet search strategies
- Evaluate quality of resources
- Skills of information specialists
- Evaluation of Google Scholar™/ScholarSFX™



# Getting up and running



**Ongoing activation & marketing** 



### Setting up a ScholarSFX<sup>™</sup> Account

### http://www.exlibrisgroup.com/scholar\_sfx.htm

#### or google **Scholar SFX**

| To sign up for the free ScholarSFX™<br>service, please complete the form<br>below |        |
|---|--------|
| *Country:   | •      |
| *Institution:   |        |
| *Institutional<br>web site<br>URL:  |        |
| *Contact<br>Person:   |        |
| *Email:   |        |
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#### Wishlist for ScholarSFX<sup>TM</sup>

- More targets
- Sabinet & SAePublications
- Interlending requests directly from Google Scholar Interface



"Offering [metasearching] as an option will not deny our students the choice of using a specific database and advanced features.

But *refusing* to offer that option will *deny* them an **alternative** that may suit their **needs** better than database-by-database searching."

- James Rettig, Univ of Richmond -



#### Conclusion

Google is probably here to stay. Our students love it! So we decided: If you can't beat them, join them with Google Scholar and Scholar SFX combined!



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# Thank you!

#### **Questions?**

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