

Federated Searching Software (FSS) :: Claims and Features

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Background

The following notes are from the working groups that met during the TAL Federated Searching Symposium held in Calgary, February 2-3, 2006.

Ten working groups met before and after vendor demonstrations to discuss claims for what a Federated Search product should do for Libraries and users, and to talk about the features in a product that would help achieve these claims. Using a claims analysis framework, the groups talked about the positive and the negative impacts different features could have and how any negative impacts might be mitigated.

After viewing the vendor demonstrations, groups were also asked to note what features had gained in importance and what features had lost importance. These are indicated in the following tables with + (gained importance) and – (lost importance). We have included footnotes where needed to clarify.

Claims

Claims are statements made about what an artifact (in this case federated searching software) should allow stakeholders achieve.

The groups worked with 12 claims, derived from work done by the Electronic Resources Group (ERG) at the University of Calgary Library.

1. Help the user map questions to the Library's information resources
2. Support novices, both in researching a subject and in using Library systems
3. Help users manage inquiries that cross different subject areas
4. Help the user acquire an understanding of how information is structured and organized
5. Allow the user to select sources, but provide support in doing this
6. Help users manage their searches, alerts, and results
7. Help the user save time
8. Expose more users to the full array of library resources
9. Help users be successful when working independently
10. Help the Library understand how resources are being used
11. Support the Library's promotion of information literacy
12. Create a sustainable technological environment

Features

The following tables outline the various features the groups identified (working from a core list developed by the ERG), their discussions and the claims they tied to each feature. The comments have been grouped by theme in the tables, but duplicate comments have not been removed. “+” and “-” signs were used to indicate when groups felt features increased or decreased in importance over the two days.

1. Search across multiple databases simultaneously

Claims

- Help the user map questions to the Library’s information resources
- Support novices, both in researching a subject and in using Library systems
- Help users manage inquiries that cross different subject areas
- Help the user acquire an understanding of how information is structured and organized
- Help the user save time
- Expose more users to the full array of library resources
- Support the Library’s promotion of information literacy

Table 1: Search across multiple databases simultaneously + + +¹		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Appeals to the younger generation; introduces them to other databases they may be unaware of • User feels they get more value of the experience • Decrease user frustration • Direct user to resources that have answers • Does not require specialized knowledge of the disciplines in order to make choices User does not need to pick databases • Don’t have to make choices—know where to start 	<ul style="list-style-type: none"> • Vendors may want their search results higher up in the FS • Takes too long • Search will take too long • search is only as fast as your slowest database + • slow search • Perception/reality that it takes too long • System slowdown/bandwidth • low bandwidth users • Too many hits e.g. bipolar in psychology or engineering • Too many hits • Some databases may have too many results • Too many results for user 	<ul style="list-style-type: none"> • Can look for opportunities to work with vendors • Need to ask vendor to include features • Pre-select or customize searches • Libraries could rank databases by subject categories (wish list) + • People who know the users make up—local decisions • Researchers and higher end users may want to create their own groupings • Set database or searching by subject • Good description of database selection criteria, be able to set pre-selected group

1 Serendipitous search—general FSS without customization

Table 1: Search across multiple databases simultaneously + + +¹

Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Save time • Efficient/saves time—“good enough” • Save time • One stop shopping • Discovery search will save time • Saves time multidisciplinary searching • We could use FS to rank our preferred database to top of result list • Reveals databases to user that are “new” to them • Discover new databases • Lead user to aspects of subject not previously considered • Results from a database they would not have thought of • More results and more formats • Increase use of databases • Simplify + • Simplify for remote users • Ease of use—convenient for customer = more use • Simplify the process • Simplifies search process for novice/beginners • Might get diverse results—more depth 	<ul style="list-style-type: none"> • information overload • Too many results • May not be appropriate • You are relying on others to consider what is appropriate • Irrelevant results • Search results may be superficial • Irrelevant material • Results not differentiated or ranked for relevance • false hits/relevancy • Relevant results mixed in with irrelevant results • Loss of accuracy • Data drop-off due to dirty data (e.g. purchased marc records aren’t the same as in-house cataloguing therefore does not make it into FS • Doesn’t search all databases • You don’t even know what you are searching • Just not knowing what they’re searching • Users may not be able to interpret the results (identify the source) • Limited number of results—what are we not seeing? • Recognize different resources • User may not understand term 	<ul style="list-style-type: none"> • know your user when customizing • Offer advanced search screen with sources and descriptions +² • Allow sorting and ranking • Need to rank results • Make sure its appropriate searching and ranking • Ability to limit search—e.g. media type, genre, formats, etc. + +³ • Having a relevance ranking that you understand and possibly that you can control • Facility to limit and filter • Ranking • clustering + + + • limit the hits through relevancy • Relevancy ranking + • Clustering • Maybe a children’s FS? • Should indicate limitations in databases being searched • Should be able to bypass FS • Should notify use at the onset, for example “if you did not find what you are looking for, then try....”

2 We liked the simplicity of basic and quick search options

3 Limit by Full Text, mentioned twice

Table 1: Search across multiple databases simultaneously + + +¹

Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Gives library a chance to integrate products they want people to use • No need for intervention • 24 hour access • Consistency of spelling and syntax • Beginner/new users who are content with good enough • Don't have to teach different interfaces • Can focus more on teaching critical evaluation of results 	<ul style="list-style-type: none"> • Lose some sophisticated features of specialized databases • you lose some features that are unique to a database • Frustration from duplicates • Duplication • Mixed quality and formats of results article, book, newspaper, etc.) • Different disciplines have varying controlled vocabulary • less technical user may miss out • cost factor/time factor • Time spent analyzing results • May loose focus wastes time • Removes motivation to learn • Disservice to users 	<ul style="list-style-type: none"> • Include catalogue as a default • Choice in format and time factor • User friendly language— what or where user is searching + • Help user form search • Provide search tips with results for user to learn from • Translation mappings can assist with controlled vocabulary problems • Spell checker + • Description about where the results are coming from • Good description of database • Ability to drill down into sources without losing the "main" search • Ability to drill down to appropriate database • provide a way to get back to the native database • Ability to dig deeper into native databases from search results • Jump straight from search results without intervening screen (give them option to see databases) • Include abstracts, etc.

Table 1: Search across multiple databases simultaneously + + + ¹		
Positive	Negative	Mitigation
		<ul style="list-style-type: none"> • Public library may wish to bring back a selection from each data base searched • design with the lowest common denominator in mind or can we cater to both the low end user and the high end • everyone should use the same standards • improve standards to make searching faster • work to increase bandwidth for everyone • balance the cost/time with the user's success • give users a choice of fast vs. quality • De duplicating results + + • Ability to mark records • If technology modeled the search process and was transparent, it could assist with the learning

Table 1: Search across multiple databases simultaneously + + +¹		
Positive	Negative	Mitigation
Related Feature: Display subject groupings and individual database on main screen		Claim: Help users manage inquiries that cross different subject areas
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Show the user what’s available • Makes things workable 	<ul style="list-style-type: none"> • Too much • Clutter • Pigeon-hole – limit • Privacy? • Dumbing down 	<ul style="list-style-type: none"> • Keep page clean but provide the option for more information (advanced searching) • Provide links so that customer knows where to get help from a real person • Less options • More useful topics
Related Feature: Pre-selecting /self-selecting database-subject portals		Claim: Expose more users to the full array of library resources
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Less assisted reference help/self-service 	<ul style="list-style-type: none"> • Must select portal 	<ul style="list-style-type: none"> • Availability to broaden search

2. Search for different formats simultaneously (images, text, sound etc.)

- Help the user map questions to the Library’s information resources
- Support novices, both in researching a subject and in using Library systems
- Help users manage inquiries that cross different subject areas
- Help the user acquire an understanding of how information is structured and organized
- Help the user save time

Table 2: Search for different formats simultaneously (images, text, sound etc.) - 4 +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Meets the public’s expectations • User feels they get more value of the experience • user appeal—broaden the audience→teens, ESL, disabilities • Shows the rich resources available • Good for non-text based learners, for example kinetic learners • Good format for the info. They don’t have to know beforehand • People are increasingly looking for multimedia resources • The expectation for specialized format search engines (e.g. video, audio, images) drives need for this • Decrease user frustration 	<ul style="list-style-type: none"> • May lose users if we don’t represent all formats • Could take too long to load if not enough bandwidth • Accessibility issues (e.g. visual.) • Language issues • Patron would have to choose a format • Patron may not have access to a format • May get a lot of irrelevant media or formats • Varying formats and subjects may not only overwhelm students but also staff • Is a good print search necessarily a good multimedia search? How are they indexed? Are index fields different? 	<ul style="list-style-type: none"> • Make different formats or alternative formats available if result display is taking too long • Vendor’s interfaces should meet standards for file formats and provide alternative file formats • Choose format pre and post results • User may set limits and exclude format types • Automatic pop-ups to allow use of multimedia • Being able to sort the results once you’ve done the search (for example, by format) • Graphical images to differentiate formats • Grouping like material • Rank within format • Pre-screening defining hoped for results

4 Search for different formats simultaneously—until there are standards results are not as good as would be required

Table 2: Search for different formats simultaneously (images, text, sound etc.) - 4 +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Use a broader variety of information sources as opposed to just the traditional • Simplify the process • No need for intervention • 24 hour access 	<ul style="list-style-type: none"> • Technical problems to display the multimedia • not convinced that the metadata is there to give us relevant results • possibility that libraries may not identify the right database and what to include 	<ul style="list-style-type: none"> • Appropriate metadata, proper cataloguing or negotiate better terms with vendors • user feedback to identify databases

3. One Search Box for all Databases

Claims

- Help the user map questions to the Library’s information resources
- Help users manage inquiries that cross different subject areas
- Help the Library understand how resources are being used
- Create a sustainable technological environment

Table 3: One search box for all databases ⁵ - 6 +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Easy for all to use • Simplicity • Google like • Searching database you may not normally • Lessens intimidation factor 	<ul style="list-style-type: none"> • Age of users and fit with users, for example child vs. adults using the same search box? • Perhaps too simplistic—may miss relevant stuff • Loss of search accuracy 	<ul style="list-style-type: none"> • Allow pre selection of search interface • Allow customization at the individual level—“my FS” • Advanced search options • Advanced searching options

5 Clear opening screen gained in importance as did ability to place search box where desired

6 Single search box—need to know what you are really searching for this to be useful

Table 3: One search box for all databases⁵ - ⁶ +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Great for certain types of users 	<ul style="list-style-type: none"> • Missing appropriate field searching ex. ISSN • Intimidation of the term “advanced search” • User may think that they’re searching everything, including the internet • Perpetuating the illusion that the search and the results are not complex, but interdisciplinary is complex • Minimizes user-control, barrier to more advanced users • Perhaps inappropriate for interdisciplinary searches 	<ul style="list-style-type: none"> • Disclaimer for basic search • Know what vendor defaults are before to have ability to change vendor defaults locally • Call advanced search something else • Recognition that there are different levels of users and demands • Contextual help and suggestions for refining a search • Searches multiple fields
<p>Related Feature: Personalize/customize/cater to diverse users with multiple options—My Library - ⁷</p>		<p>Claim: Help the user save time</p>
Positive	Negative	Mitigation
	<ul style="list-style-type: none"> • Some people don’t want to customize 	

⁷ If you pick the wrong groups to search, you get no results, not as easy as it appears

4. Natural Language Searching

Claims:

- Help the user map questions to the Library’s information resources
- Support novices, both in researching a subject and in using Library systems
- Help users be successful when working independently

Table 4: Natural language searching		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Easy for all to use, no need to know special terminology • Find something stemming • Patron does not have to know search syntax • More Google-like (getting better answers) • Users are used to it (expectations) 	<ul style="list-style-type: none"> • Spelling for example American vs. Canadian or UK • Terminology is not the same in all database; not all possible hits will be returned • May not work together • What if the results are inexplicable • Quality of search results • Want all (grad students) want to do their own weeding • Setting for FSS vs. metadata in databases 	<ul style="list-style-type: none"> • Vendor should demonstrate that it can accommodate spelling variations • Should be able to map terms to a thesaurus • Advanced search option • Provide “cannot do this in this database’ so the user knows • Natural language • Mitigates misinterpretation
Related Feature: Automatic Spell Corrector +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Searches do not fail 	<ul style="list-style-type: none"> • Alternate spelling 	<ul style="list-style-type: none"> • Put in Canadian/US spelling alternatives

5. Meet User Expectations

Claim

- Help the user map questions to the Library’s information resources

Table 5: Meet user expectations		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Able to deliver answers to many devices 	<ul style="list-style-type: none"> • Marketing to users can be difficult • FS is just one more added product to have to know about • Users will want it to work in wireless and PDA environments 	<ul style="list-style-type: none"> • Vendors should supply marketing materials • Should be able to change the output of a search to match the device—work with vendor or do this customization in-house • Eventually will expect this to be a standard feature from vendors

6. No Training Required Interface

Claim

- Support novices, both in researching a subject and in using Library systems

Table 6: No training required interface +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Save staff time • Remote users (good) • Inexperienced user gets results • Less intimidating • Good will for the library • Self-sufficiency 	<ul style="list-style-type: none"> • Not really learning anything • Is good enough • They don’t know what they are missing • No obvious library connection 	<ul style="list-style-type: none"> • Offer on-line tutorials • Referral to other related sources • Other people who searched for this, also... this resource • Links to contact for help • Help in how to refine search

Table 6: No training required interface +		
Positive	Negative	Mitigation
	<ul style="list-style-type: none"> • Missing the expensive/appropriate information • Usage statistics • May impact on database usage statistics (skewed) • Not using interface • What assumptions about search syntax? 	<ul style="list-style-type: none"> • Our responsibility to teach them how to evaluate the results (resources missed) • Links to training opportunities

7. Able to drill down to results quickly with a minimum of steps

Claim

- Support novices, both in researching a subject and in using Library systems

Table 7: Able to drill down to results quickly with a minimum of steps +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Patrons want and expect it • Instant results • Saves their time • Painless • Under used databases get used 	<ul style="list-style-type: none"> • Technologically difficult • Requires customization authentication • How fast you get into native interface • Does not function like OPAC e.g. holds 	<ul style="list-style-type: none"> • Go straight into results • Provide options for getting into native interface • De-duplication + ⁸, ranking of databases, clustering • Back buttons • Link back to search results • Open a new window/option

⁸ Identifying duplicates (not just de-duping)

8. Painless Database Discovery

Claim

- Support novices, both in researching a subject and in using Library systems

Table 8: Painless database discovery		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Makes it available to those who don't want to learn 	<ul style="list-style-type: none"> • Does not teach to those who do not want to learn • Does not encourage self-sufficiency 	<ul style="list-style-type: none"> • Interface options

9. Provide the sophisticated searching options found in individual databases (thesaurus, format, date, etc)

Claim

- Help users manage inquiries that cross different subject areas

Table 9: Provide the sophisticated searching options found in individual databases (thesaurus, format, date, etc)		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Advanced interdisciplinary searcher may expect all these options, and may require them • Assist user to refine search at outset • Retain features present in individual databases • Encourages user to learn • Advanced interdisciplinary searcher may expect all these options, and may require them • Assist user to refine search at outset 	<ul style="list-style-type: none"> • Intimidate the user • Too many limits may reduce the relevant results by too much • Features like a thesaurus may not work across all databases and terminology in thesauri will be very different across disciplines • Users may not understand why the search fails • May require more specialized knowledge • Intimidate the user 	<ul style="list-style-type: none"> • Contextual support, telling users what is going on behind the scenes • Offer alternatives for when the user does not get the result they need or expect • Offer terminology, spelling options, spelling alternatives • Use natural, user friendly language • Contextual support, telling users what is going on behind the scenes

Table 9: Provide the sophisticated searching options found in individual databases (thesaurus, format, date, etc)		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Retain features present in individual databases • Encourages user to learn 	<ul style="list-style-type: none"> • Too many limits may reduce the relevant results by too much • Features like a thesaurus may not work across all databases and terminology in thesauri will be very different across disciplines • Users may not understand why the search fails • May require more specialized knowledge 	<ul style="list-style-type: none"> • Offer alternatives for when the user does not get the result they need or expect • Offer terminology, spelling options, spelling alternatives • Use natural, user friendly language

10. Name the sources in the results display

Claim

- Help the user acquire an understanding of how information is structured and organized

Table 10: Name the sources in the results display		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • By database or collection • By type of source e.g. journal • Relevant results repeat use 	<ul style="list-style-type: none"> • Confusions regarding the type of resource will persist • Aggregators will add to confusion • Difficulty with citations—too complex 	<ul style="list-style-type: none"> • Good definition of what a source is • Appropriate level of complexity—name this so user becomes more familiar • List original source and name of database

11. Allow filtering results (date, format, full text etc.)

Claims

- Help the user acquire an understanding of how information is structured and organized
- Expose more users to the full array of library resources
- Help users be successful when working independently
- Support the Library’s promotion of information literacy

Table 11: Allow filtering results (date, format, full text etc.)		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Reduce the number of hits for user to sort • Make results manageable • Should increase relevancy • Get results appropriate to needs • Makes the search more useful • Replaces reference interview – gets to what users want • Direct people more immediately to results that are new, available or relevant 	<ul style="list-style-type: none"> • May miss useful results • Can filter out results that could be appropriate to needs • Missing relevant results • Filter may not be appropriate to search or subject matter or user need • Not all filters work across databases • Incomplete metadata leaving results out + • Different needs • Dropdown menus are confusing • Too many choices are overwhelming • Require product expertise • Too narrow –can’t get back to general 	<ul style="list-style-type: none"> • Let user control and customize • Simplify and drop downs • Provide explanation • Lead user to limitations • Easy ability to un-do or change search • Prompted filter – clear path to get back up more results • Filter immediately changes results as opposed to re-running the search with the filter on it. • Let People know what filters are applied • Always choice • Filters should be visible and user selected

Table 11: Allow filtering results (date, format, full text etc.)		
Positive	Negative	Mitigation
Related Feature: If you like this...you'll like this More of this		Claim: Help users be successful when working independently
Positive	Negative	Mitigation
	<ul style="list-style-type: none"> Screen space 	<ul style="list-style-type: none"> Personalize search screen

12. Sort results by different fields (date, author, relevance etc)

Claim:

- Allow the user to select sources, but provide support in doing this

Table 12: Sort results by different fields (date, author, relevance etc)		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> Reduces results (less overwhelming) Flexibility User can choose what's important, e.g., author Groups things/results by users choosing 	<ul style="list-style-type: none"> How do users know the impetus behind the relevancy ranking? May miss good material because of choice 	<ul style="list-style-type: none"> Design issue—ask the vendor to address Ability to switch the sort so can see information in another way

13. Able to export results into standard bibliographic software (Endnote, RefWorks etc) +

Claim

- Allow the user to select sources, but provide support in doing this

Table 13: Able to export results into standard bibliographic software (Endnote, RefWorks etc) +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Solves problems related to citations • Quick • Easy 	<ul style="list-style-type: none"> • Technical issues in exporting data • May be more complex, more technical issues if searching across many databases 	<ul style="list-style-type: none"> • User should look at records—verify all came across • Some form of post processing of data • Access to technical support

14. Has internal bibliographic management tools for storing results in personal directories & Provides personal directories and folders for storing results and searches ++ -

Claims

- Allow the user to select sources, but provide support in doing this
- Expose more users to the full array of library resources

Table 14: Has internal bibliographic management tools for storing results in personal directories & Provides personal directories and folders for storing results and searches ++ -		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Right there—convenient • Save a search or strategy—saves key strokes, easy to revise work + 	<ul style="list-style-type: none"> • May forget password and id • May not be best strategy 	<ul style="list-style-type: none"> • Portal people can log into • Intelligent feedatabaseack • Shared files—librarian can add in results and post for the researcher to consider

Table 14: Has internal bibliographic management tools for storing results in personal directories & Provides personal directories and folders for storing results and searches + + -		
Positive	Negative	Mitigation
		<ul style="list-style-type: none"> • For children—provide made to order searches • Vendors should include in software the ability to cut and paste • Vendor should provide space for storage
Related Feature: Integration with other applications e.g., OPAC, Citation manager + -		Claim: Expose more users to the full array of library resources
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Article linking • OPAC • Citation management 	<ul style="list-style-type: none"> • Difficult to manage and maintain • Failure points • User does not need the full meal deal • Hard to tell what is what 	<ul style="list-style-type: none"> • Clear institutional objectives • Strong technical support (vendor and in-house) • Ability to opt-out of it

15. Allow user to set up alerts -

Claims

- Allow the user to select sources, but provide support in doing this
- Expose more users to the full array of library resources

Table 15: Allow user to set up alerts -		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Personalize--from ordinary public library user to specialist that knows area of interest 	<ul style="list-style-type: none"> • May be a cost • User may forget • Requires user to maintain 	<ul style="list-style-type: none"> • Reminders • Ability to unsubscribe

Table 15: Allow user to set up alerts -		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Let users know what’s new • Simplify instruction for some users • Saves time • Saves individual from repetition • Popular feature would be good with faculty and researchers 	<ul style="list-style-type: none"> • Available at portals outside the library—so why use the library? • Could be confusing—how to delete • Too focused • Too much unawareness, ignorance • Spam yourself • Learning curve 	<ul style="list-style-type: none"> • Search multiple paths • Context sensitive help • Guided search • Use saved searched • Usable interface

16. May format output or saved results in a particular way

Claim

- Allow the user to select sources, but provide support in doing this

Table 16: May format output or saved results in a particular way		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Quick • Easy 	<ul style="list-style-type: none"> • May not be flexible • May not suit user 	<ul style="list-style-type: none"> • Talk to vendor

17. Good timely help – real-time chat reference

Claim

- Help users be successful when working independently

Table 17: Good timely help – real-time chat reference		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Decrease the intimidation factor of both using the tool itself and also approaching a person 	<ul style="list-style-type: none"> • May not always answer the question asked 	<ul style="list-style-type: none"> • Appealing human intelligent agent
Related Feature: Reference interview – questions about user to tailor the results		Claim: Help users be successful when working independently
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Easier – direct link to information 	<ul style="list-style-type: none"> • Privacy • Too narrow 	

18. User can modify the search parameters (databases, formats, dates, etc)

Claim:

- Help users be successful when working independently

Table 18: User can modify the search parameters (databases, formats, dates, etc)		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Ease of use – distance ed • Self-sufficiency • Options 	<ul style="list-style-type: none"> • Too complicated • Not standardized • Lack of user knowledge and skill 	<ul style="list-style-type: none"> • Standardization • Sub search as a filter • Pyramid – users narrow in as they go along – modify search

Table 18: User can modify the search parameters (databases, formats, dates, etc)		
Positive	Negative	Mitigation
Related Claim: More choice		Claim: Help users be successful when working independently
Positive	Negative	Mitigation
<ul style="list-style-type: none"> Independent 	<ul style="list-style-type: none"> Overwhelming if there is so much choice at first 	<ul style="list-style-type: none"> Start simple then offer choices after initial search Active or interactive guide (in context help)

19. Statistical use reports on demand

Claim

- Help the Library understand how resources are being used

Table 19: Statistical use reports on demand		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> Help staff Generate reports Evaluate products Justify funding Who is using How are they using it Design instruction 	<ul style="list-style-type: none"> Do we know what the stats mean? Can skew existing database use stats Increasingly difficult to interpret results within increasingly complex environment 	<ul style="list-style-type: none"> Need to be conscious of how meta-search will skew the numbers Certain indicators may still be meaningful (full-text page views) Comply with standards

20. Produce reports on use patterns (hits, retrievals, filtering etc.)

Claim

- Help the Library understand how resources are being used

Table 20: Produce reports on use patterns (hits, retrievals, filtering etc.)		
Positive	Negative	Mitigation
		<ul style="list-style-type: none"> • Counter compliance might allow comparability • Ability to separate out FS searches versus native interface searches • Means of recording user satisfaction with tool.

21. Rely on commonly available hardware, operating systems and software 9

Claim

- Create a sustainable technological environment

Table 21: Rely on commonly available hardware, operating systems and software		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • easy to find hardware • scalable • cost effective software that provides consistent results 	<ul style="list-style-type: none"> • institutional policies may require certain hardware • massive boxes appear to be required • privacy • limited customization • more staff 	<ul style="list-style-type: none"> • Be hardware independent • Use open source • Use ASP • Be able to provide FS lite for limited bandwidth/hardware sites • Provide as a web service

9 In the group, those that want ASP really really want it, and those that want local really really want it

22. Vendor supplies regular updates and upgrades +

Claim

- Create a sustainable technological environment

Table 22: Vendor supplies regular updates and upgrades +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • New functionalities and upgrades to knowledgebase • New security features and fixes • Standards kept up to date 	<ul style="list-style-type: none"> • Lose customizations and need to rebuild + +¹⁰ +¹¹ • Requires more staff time and effort • vendor driven timelines 	<ul style="list-style-type: none"> • Vendor hires good programmers • Vendor provides the migration tools • Vendor provides the standards • Good documentation • Training tools at no cost

23. Built using accepted standards + + (NISO, MXG)

Claim

- Create a sustainable technological environment
-

Table 23: Built using accepted standards + + (NISO, MXG)		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Consistency • Interoperability + + -¹² • Migration is easier 	<ul style="list-style-type: none"> • Resistance by vendors to the adoption of standards • Could lose functionality • Which standards, xml or metadata standards? • Standards can take time to update 	<ul style="list-style-type: none"> • Library chooses vendor base on existence of standards • Arm twisting

10 You want ability to customize easily into your own website, branding etc.

11 Ability of library vs. vendor control over customization gained in importance

24. Wide market acceptance—lots of customers

Claim

- Create a sustainable technological environment

Table 24 Wide market acceptance—lots of customers		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Chance of survival • Compete with Google • Strong user base—safety in numbers • More implementations greater the knowledgebase • More willing to upgrade and implement changes 	<ul style="list-style-type: none"> • Less innovation • Microsoft syndrome • Less responsive • Loss of functionality over time 	<ul style="list-style-type: none"> • Consortia deals and local user groups to exert pressure • Local customized supported through consortia and local user groups • Wait for early adopters—big institutions—to jump first

25. Security

Claim

- Create a sustainable technological environment

Table 25: Security		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Compliance with licensing restrictions 	<ul style="list-style-type: none"> • Firewalls • More staff to support • Impacts on the user experience 	<ul style="list-style-type: none"> • Standards based authentication and authorization e.g., Shibboleth

12 There was more interoperability then we thought between third parties and the new technology (this is why that feature seemed less pressing)

26. An approachable and responsive vendor with access to technical staff + +

Claim

- Create a sustainable technological environment

Table 26: An approachable and responsive vendor with access to technical staff + +		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Easier to support from local end 		<ul style="list-style-type: none"> • Access to technical staff and documentation

27. Open or Closed Source?

Claim

- Create a sustainable technological environment

Table 27: Open or Closed Source?		
Positive	Negative	Mitigation
<ul style="list-style-type: none"> • Cost is lowered and customization enhanced with open source 	<ul style="list-style-type: none"> • OS requires staff • CS provides version and is available 	<ul style="list-style-type: none"> • CS has commercial support available

Summary of additional notes from Day 2

The following comments were gathered from the various working groups during an open session at the end of Day 2.

1. General impressions

- Hard to compare products
- Less sophisticated than thought
- Need more information from vendors and institutions
- Do we even need something like this for something like 16 databases?
- Geared to academic institutions with many e-resources
- Some may muddy the waters, i.e. presentation of results by database still result in first listed results used
- Variety of pricing models
- Academic libraries may use FS differently than public libraries

2. What features gained importance?

High ranking

Searching

- Spell-check

Results

- Clustering
- De-duplication
- Filtering
- Clarity of results
- Export results (RefWorks)

System Design

- Standards
- Speed
- Ease of use
- Customization
- User focus
- Personalization
- Quality of the metadata
- Interoperability

Vendor

- Pricing models
- Vendor responsiveness, access, regular upgrades

Others to think about

- Search by format
- Library staff buy in
- Number of databases that can be searched
- Staffing to maintain
- Canadian content
- Open source
- Quick search option
- Clear connection between FS and link resolver

3. Comments after product demos

Individual product names have been removed from these comments. We thought that given the structure of the symposium, it wouldn't be fair to single out any particular vendors. However the comments still demonstrate what struck the groups as important and worth comment.

Searching

- uses Google (for spell check and suggest a word)
- Staff determine database relevancy, can chose date, database
- Populate search terms into the native interface. Also allowed creation of own sets of databases, because it is homegrown it is very customizable, search box is embedded
- Enterprise portal solution using API, could guide people into searching, topic areas could be sorted by format-assisted independence, akin to information guides.

Results

- allows users to do their own filtering
- Deep searching complex, own algorithm for relevance
- Relevance, keyword, title works best vs. keyword in title and abstracts
- Really liked clustering
- Relevance rating not obvious- getting you into so many databases as possible

Interface Design

- Made it easy to get in to the native interface
- Opensource – perl
- May have been a bit much for users – complicated
- OPAC based, FSS can be a sidebar

4. What features now seem less important?

Searching

- The following elements were inherent—so they are either there or the product isn't going to do what was intended

- Search across multiple databases simultaneously—if you can't do this what's the point
- Single search box—need to know what you are really searching for this to be useful
- Search for different formats simultaneously—until there are standards results are not as good as would be required

Results

- Displaying in database order

System

- Most things are important, but if the vendor can't deliver, then the organization should not focus on that feature, e.g. formats
- Claim 12 (the product will contribute to a sustainable technological environment) now seems less important
- Interoperability between library systems

5. What surprised you?

Positive

- Open source available
- clustering
- Prices
- There was more interoperability than we thought between third parties and the new technology (this is why that feature seemed less pressing)
- remote hosting
- Now we wonder if the approach shouldn't be to launch early and then tweak.
- We liked saved searches and the ability to save session search history
- We liked the simplicity of basic and quick search options
- How many people have already bought and put into use (early adopters)
- Encouraging that doom and gloom is over, these are valuable and can help the user

Gaps

- No single mixed search results
- Want to see spell checking, saw that for many it was a coming feature
- De-duping is inconsistent and not really true de-duplication

Negative / Questioning

- Will these products really increase usage of database—especially for rural/public
- Do public patrons find the answer through FS?
- In the group, those that want ASP really really want it, and those that want local really really want it
- Complexity—knew it would be complicated—but not that complicated!
- You think you want access to native database, but could be confusing to users as new windows pop up

- Length of time to execute searches actually felt long for us, so it would be LONG for people used to Google, speed needs to be a priority for vendors
- Need to show what was going on behind the scenes i.e. timeouts, unresponsive programs

6. What suggestions do you have for TAL?

Wait

- Play the waiting game until features appear or go with open source and fund it so it will succeed, don't want to change mid stream

Proceed

- TAL should buy a provincial license for a product (or the Lois Hole Campus Alberta Digital Library should do this)
- TAL should host a federated search solution
- LHCADL should pay attention, FSS will improve user—just pick features you like, the products will improve
- Group support through LHCADL or TAL will make the “early days” less risky
- Pricing needs to be considered but need to focus on product's strengths, consider this ahead of pricing
- Replace TAL Online with a federated search project and integrate with a link resolver

TAL as Change Agent

- TAL should promote the use and development of standards
- Make sure Canadian content is there and the links are in place
- Any FSS should be customizable
- Licensing must require standards compliance and the provision of better statistics
- TAL should work together to develop a common definition of user statistics
- TAL/LHCADL—throw some money behind development of open source option—customize as you go—collaborative development will benefit everyone
- Any product needs to draw people in—have entertainment value—be fun