

# “I want it all and I want it now!”

## Managing expectations with MetaLib and SFX at the University of East Anglia

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Perhaps the greatest challenge in managing electronic databases and journals is the management of our users' expectations. Whilst I have never heard anyone actually say, “I want it all and I want it now”, this statement lies just beneath the surface of many a reference enquiry. Our staff and students want content that is relevant to them at this moment in time and they want it now.

In response we try to encourage them to use the library catalogue (OPAC) and links from our library web pages to find information electronically. These tools are fine if our users already have the information they need from a reading list or other bibliographic source, for example. But if people are trying to research a topic from scratch, the relevance of our OPAC and web pages as starting points for their research seems more limited.

For example, our library catalogue indexes the titles, direct links (URLs) and holdings information for our electronic journals (e-journals), but it does not actually index the full text articles which is often what people want. Similarly, our web pages attempt to provide a simplified route for accessing our major electronic databases, like the Web of Science, but there are so many of these to choose from that our collection is simply too bewildering for many people.

A study was recently carried out by the JISC-funded [1] EDNER Project (Formative Evaluation of the Distributed National Electronic Resource), on ‘the searching behaviour of Higher Education (HE) students as they attempted to locate electronic services’.

It found that only 10% of their sample used the University OPAC as their starting point. By contrast, “45% of students used Google as their first port of call when locating information.”<sup>[2]</sup> There is no denying that students find useful information when using search engines like Google, but the obvious problem is that they will not be getting access to the institution's subscribed resources, ones that are arguably more suitable for their studies at this level.

### **What's so attractive about Google?**

We recognise that Google is attractive because it allows people to search and browse for information quickly, through one simple interface and to view a set of unified results. The minimal time and effort required to get results may be more important to the user than the quality of the material they find. To meet this challenge, we began to realise that we needed a way of presenting our electronic resources that would share some of the attractive features of Google. The difference would be that we would be directing people to search our subscribed electronic resources rather than just the internet. The MetaLib portal from Ex Libris, a major Library Management System (LMS) provider, has helped us to move closer to meeting this challenge.

What do I mean by the term ‘portal’? There are a number of possible definitions of ‘portal’<sup>[3]</sup>, but I use it simply to refer to ‘a web-based interface that acts as a starting-point for searching or browsing a selection of electronic resources’.



Figure 1

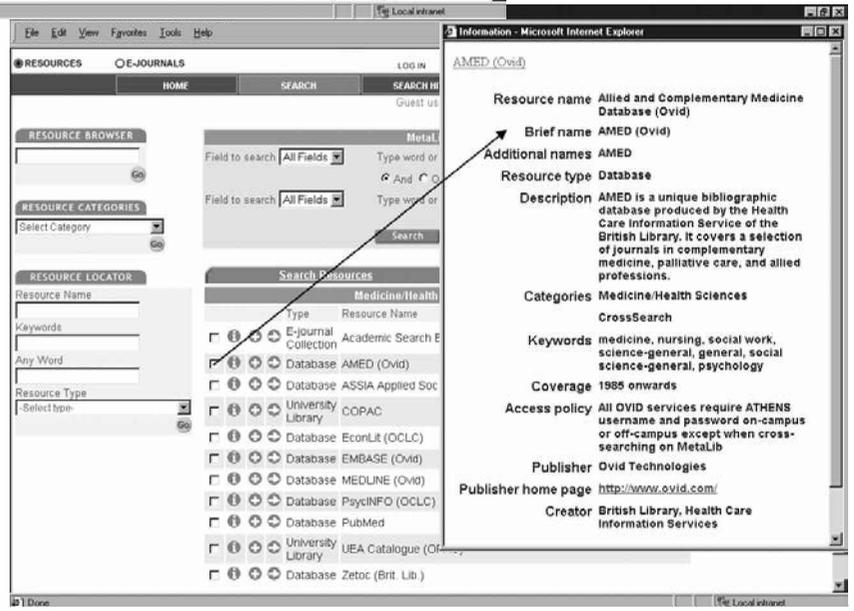


Figure 2

**How does the MetaLib portal work?**

The MetaLib portal allows us to present all our resources through a single interface and enables our users to browse ‘at a glance’ resources that are relevant to their studies. It enables us to give particular emphasis to our own collection of subscribed electronic resources at UEA. MetaLib works as both a resource discovery and cross-searching portal. It also includes the SFX linkage software which provides direct links to our full text electronic journal collection.

MetaLib is perhaps best understood by describing it as operating at three levels: basic, intermediate and advanced. At the basic level, MetaLib allows you to bring together all of the library’s electronic resources into one portal,

organise them into categories or types of resources for browsing purposes, and provide direct links to each one.

From the MetaLib home page you can choose the category of resources you would like to access and see all the databases and electronic resources relevant to that subject. In the following example (Figure 1), we have chosen the Medicine and Health Sciences category.

To view catalogued information (Figure 2) about each resource, you can click on the ‘i’ (information) button adjacent to it.

At this basic level, users can then simply click on the direct link to the database they want to access and they go straight there, just as if this was a static web page. The improved organisation and uncluttered presentation of resources at this level

allows speedy access to databases and helps users to discover other resources relevant to their subject area.

It is at the intermediate level that MetaLib really comes into its own because it gives the option of cross-searching our major electronic resources.

‘Cross-searching’ means searching several databases simultaneously, even if they come from different providers and have different interfaces. This functionality is particularly useful when you are unsure which database will be most useful for your research or if you have a partial reference and want to identify which database contains the full citation. At UEA we have set up sixteen databases to be cross-searchable so far, including different types of resources such as our library catalogue, abstracting and indexing (A & I)

databases, full text electronic journal services, etc. To select databases to cross-search, you click in the check boxes adjacent to them, enter your search terms in MetaLib’s own interface and then click on the ‘Search’ button (Figure 3).

The ‘number of hits’ per resource is then displayed. This enables you to make preliminary judgements about which of the resources are most relevant to you. You then have the option to refine the search further, merge the records retrieved, or choose to view the results from any of the databases.

Results from the cross-searched databases are presented in a consistent format through MetaLib’s own interface at both the ‘summary results’ level (Figure 4) and at the ‘full results’ level (Figure 5, overleaf).

Figure 3

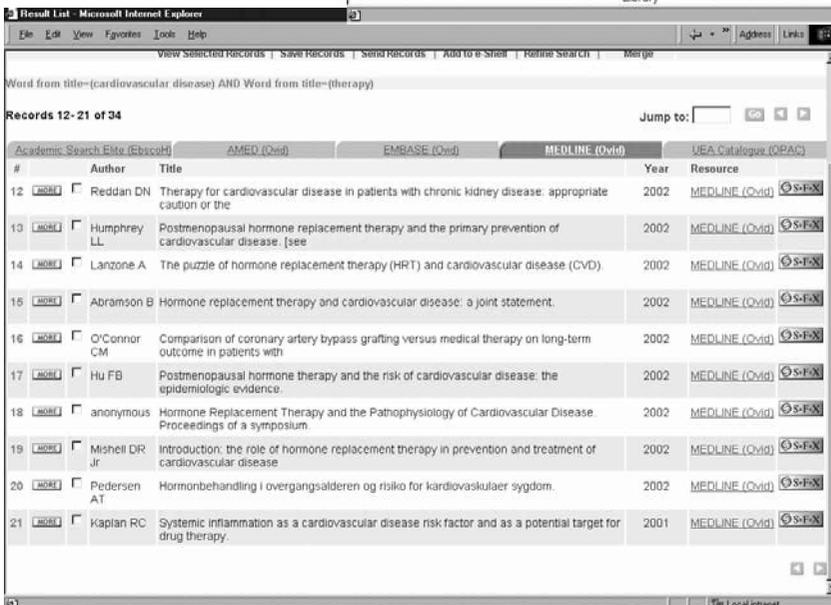
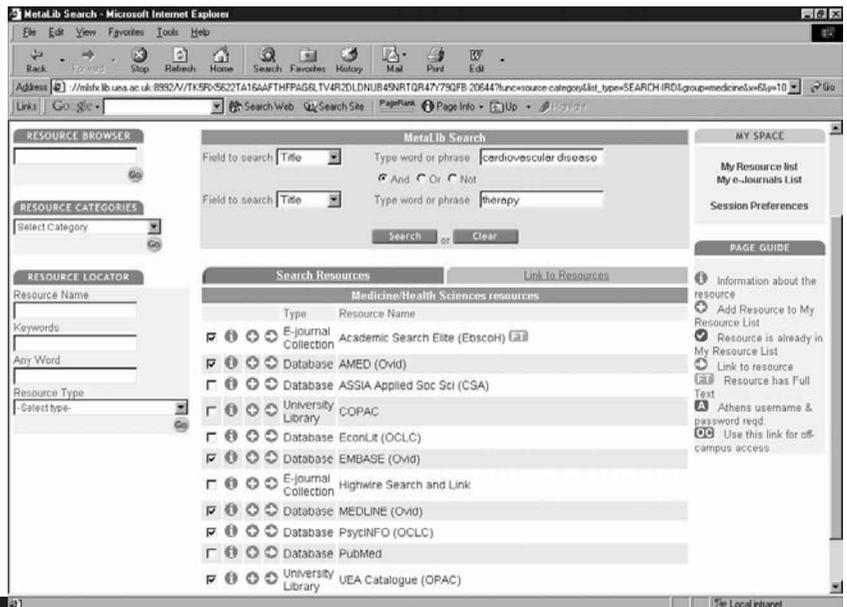


Figure 4

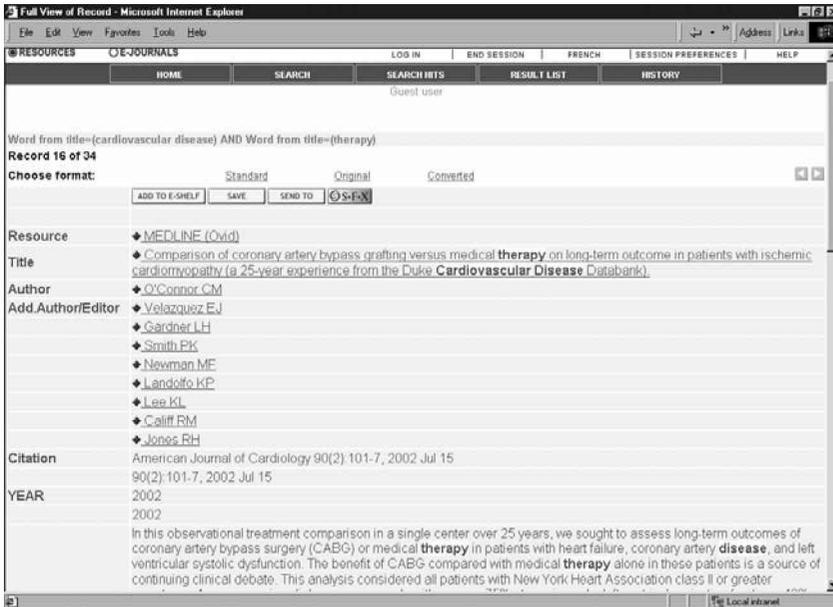


Figure 5

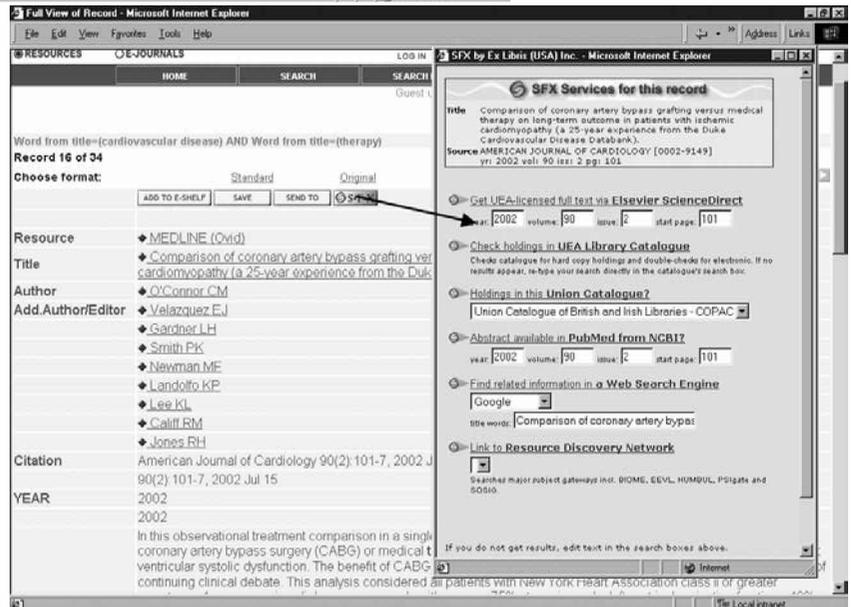


Figure 6

Records can be marked, saved to disk or reference software, and so on, providing much of the functionality we would expect from a major database.

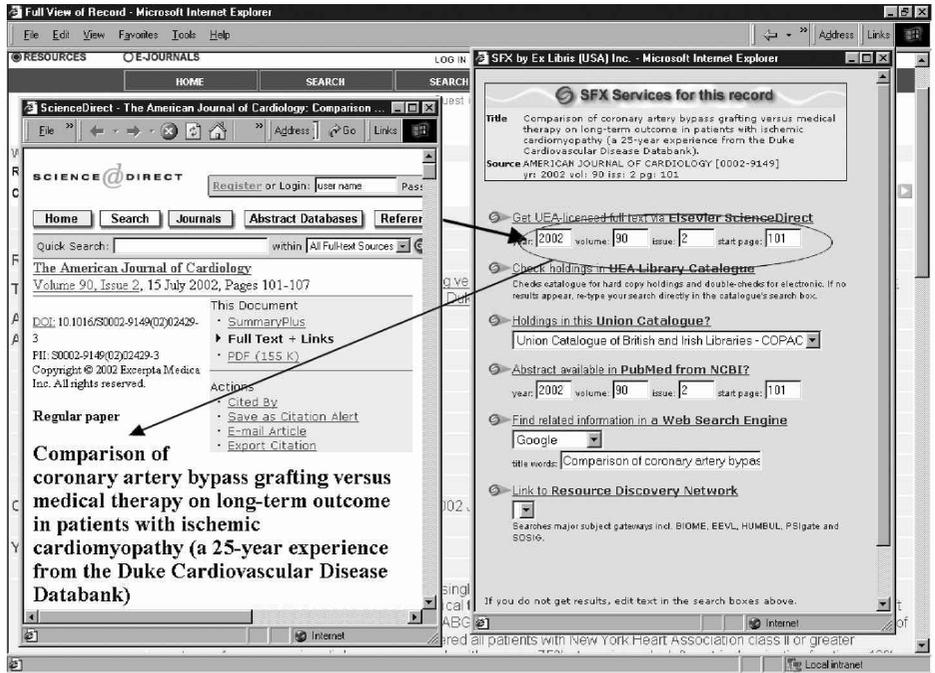
At the advanced level, MetaLib integrates with Ex Libris's SFX linkage software. This enables users to check whether our library has electronic or hard copy holdings for any individual record obtained as a result of cross-searching the databases. This SFX "context-sensitive" linkage system has been well documented, and actually works with a wide range of A & I databases, not just MetaLib. Further technical details about SFX, and the OpenURL technology on which it is based, can be found in Jenny Walker's article [4].

In any of the databases you have cross-searched through MetaLib's own search interface, an SFX button appears adjacent to each record in your list of results. You click on the SFX button and the SFX menu then appears which presents you with the options that match the metadata from your original record (Figure 6).

Firstly, if the article is available in electronic full text at UEA, then the option to 'Get UEA licensed full-text...' will be presented. You click on this link to be taken straight through to the article, which in this example is from Science Direct (Figure 7).

If full text is not available electronically, there is always the option to query UEA's library catalogue to see whether we have a hard copy subscription to the journal in the library. So these

Figure 7



are the two main options on the SFX menu – link to electronic full text or check hard copy holdings in your library catalogue.

MetaLib and SFX are beginning to have an impact on the ways in which our staff and students are accessing our resources. Previously the full text of the article they had identified could be in any number of different databases and people were not always sure where to look. By contrast, MetaLib and SFX enable them to link immediately to the relevant services. In this way, MetaLib and SFX are effectively promoting our services for us, ensuring that we get maximum value for money out of the resources and e-journals we have subscribed to.

**Are there any limitations?**

The main limitation with MetaLib is the fact that not all databases are cross-searchable. In theory, many more of our databases could be exploited in this way because MetaLib can potentially accommodate a whole range of database protocols and application programme interfaces (APIs), not simply z39.50 and HTTP for example. The main constraint is whether or not an individual provider will permit their database to be accessed in this way. In particular, some providers are concerned about the native interface of their electronic resource being bypassed if it is included in a cross-searching portal. However, MetaLib has

already anticipated these concerns. For example, it is possible to return directly to the native interface of any database during the cross-searching process. Furthermore, MetaLib has just introduced a 'halfway house' option that may be more appealing to some publishers. These so-called 'Search and Link' resources, like the Highwire Library of Science and Medicine for example, are cross-searchable at the initial stage so that the number of hits retrieved can be compared with other cross-searchable databases. However, the actual results are then displayed in Highwire's own web interface rather than in MetaLib.

Related to this issue, some publishers insist on up-front 'Athens' authentication in the UK. With permission, we have been able to make some of our 'Athens' resources cross-searchable, but not all. MetaLib's own authentication functionality, which can authenticate against our institutional LDAP (Lightweight Directory Access Protocol) authentication server, provides a solution that is just as robust as 'Athens'. We have found that most publishers, once they see the benefits of having their databases cross-searchable in MetaLib, are happy to have their resources included in this way. In their paper on future role of the Distributed National Electronic Resource (DNER), Pinfield & Dempsey rightly emphasised '...effective provision of cross-searching services requires dialogue and co-operation between data provider

and library service.’<sup>[5]</sup> This process should become easier as more institutions start to use products like MetaLib and demand for this kind of access increases.

### What if we can't afford this kind of solution?

So what if your institution is not currently using these kinds of solutions? How might the principles that underlie the MetaLib and SFX software be applicable to other institutions? Firstly, these products exploit open protocols such as z39.50 for cross-searching and the Open-URL for linkage. There are many other Library Management System (LMS) suppliers out there including this kind of functionality either as part of their LMS or as stand-alone products. For more details about the options available, see the recent JISC Technology and Standards Watch Report entitled ‘Library orientated portals solutions’<sup>[6]</sup>. It can only be a matter of time before this kind of software becomes available more widely.

In the meantime, it is perhaps worth evaluating the presentation of your resources and how they relate to each other. Are we making links and connections between resources that are helpful to the whole range of our users? Is it as quick and easy to browse and search our electronic resources as it is to use a search engine like Google? If you are considering implementing a portal, there is some helpful literature available to help you with the process of evaluation. In particular, take a look at the EDNER Project issues paper 5<sup>[7]</sup> and at Robin Murray’s paper in the November edition of CILIP’s *Library and Information Update*<sup>[8]</sup>.

### What are the wider implications?

This kind of thinking is important not just at the micro-level of individual institutions but also at a national level. For example, the JISC are currently considering how best to present the electronic resources that are currently part of the DNER. Some kind of portal, that brings these resources together in a more cohesive way and allows cross-searching, has to be a way forward for the new national information environment (IE)<sup>[9]</sup> that is set to replace the DNER. However, I would argue that such a portal will also need to be flexible enough to allow local institutions to select and present

only a subset of the resources available, ones that match the profile of their own individual institution. JISC, CHEST<sup>[10]</sup> and other consortia should also be taking into account the need for access to open-linking solutions and z39.50 servers or equivalent protocols as they negotiate future deals on behalf of institutions.

To use the current internet jargon, we’re looking to make our MetaLib portal ‘sticky’, that is, a place to which people will keep coming back – and that they will use as the starting point for their research. MetaLib and SFX have given us a new sense of confidence in promoting our electronic resources, but they are just tools in this process. Staff and students still need support, especially as we are encouraging them to change the ways they are used to searching and browsing for information. The need for user education, that links our resources with the curriculum, is still very important. Managing this kind of change is resource-intensive, financially and in terms of staff time. I cannot claim these tools have removed the trauma of managing and promoting our electronic resources altogether, but they are certainly helping to reduce it.

### References

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- [3] For a definition of ‘portal’ see Miller, P., *The Concept of the Portal. Ariadne*, 2001, 30.  
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<http://www.jisc.ac.uk/techwatch/reports/index.html>

- [7] EDNER (Formative Evaluation of the Distributed National Electronic Resource) Project, *Portals in Higher and Further Education* (Issues Paper 5), 2002.  
<http://www.cerlim.ac.uk/edner/ip/ip05.rtf>
- [8] Murray, R., Putting portals into practice, *CILIP: Library and Information Update*, 2002, 1 (8) 42-43.
- [9] Powell, A., 5 step guide to becoming a content provider in the JISC Information Environment, *Ariadne*, 2002, 33.  
<http://www.ariadne.ac.uk/issue33/info-environment/intro.html>
- [10] CHEST: Combined Higher Education Software Team

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