

The Process of Selecting Federated Search and Link Resolver Products

By Nancy Colyar

LALINC is the Louisiana Academic Library Information Network Consortium, whose members are the libraries at institutions of colleges and universities in Louisiana. The LALINC Research and Development Committee, which reports to the LALINC Executive Committee, had a charge last year to evaluate and recommend federated searching and link resolver products. Committee members represented a variety of institutions in scope and size in LALINC, as well as LOUIS staff.

Federated searching is defined as "Through a single entry point simultaneously searching multiple resources (library catalogs, databases, web sites) from disparate vendors, platforms, protocols, and sources, and delivering an integrated set of results." (<http://www-unix.oit.umass.edu/~cturner/ITIG05/about.html>)

A link resolver can be described thus: "brings together information about a citation, the user, and the targeted resource. The link resolver is activated when the user clicks on a link embedded in the user interface. As the various databases to which linkages are made have different interfaces, support different searching techniques, and have other unique features, the OpenURL Framework is the underlying standard." (<http://www.ala.org/ala/pla/plapubs/tech-notes/librarywebportals.htm>)

In August, 2004 the Committee compiled a list of vendors and products, starting with vendors of integrated library systems and those who exhibit at ALA or about whom we had read articles. We went through a list from a blog to consider other resolver products or vendors which we had heard of to make sure we were not missing any other major players. We did in-depth investigations of eight vendors for each product. Those for federated search: Blue Angel MetaSearch, Endeavor ENCompass, Ex Libris Metalib, Fretwell-Downing ZPortal, Innovative Interfaces MetaFind, Muse Global MuseSearch, Sirsi Single Search, and WebFeat Prism. Those for link resolvers: CARL Gold Rush, Ebsco LinkSource, Endeavor LinkFinder Plus, Ex Libris SFX, Fretwell-Downing OL2, Innovative Interfaces WebBridge, Serials Solutions Article Linker, Sirsi Resolver.

By October committee members had compiled

and asked questions of the vendors. Answers to these would be used to evaluate the vendors and their products for recommendation. Questions were revised and added throughout the process. Some questions were specific either to federated search or link resolver products and others applied to both.

Most questions were about the database, the user interface, customization, and reports. Members spent several months discussing detailed pros and cons of each vendor and product. In particular, we wanted vendors and products which were remotely hosted at the vendor site, had customers which were large academic consortia, did not require any knowledge or support of Oracle database, and had customers whose systems would work with Sirsi's iLink online catalog. We also considered the list of specific features we wanted, such as a citation search and a limit to full text. We wanted products which could have consortium centralization, but would allow customization for each site. We needed the capability to add databases that each site subscribes to individually. LSU, for example, has access to some databases from LOUIS, some that we subscribe to ourselves, and others that we subscribe to along with a "mini-consortium" subset of LOUIS members. We considered the clarity and completeness of the answers to our questions. We asked the vendors to provide customers' contact information so we could check references.

In addition to reviewing the answers to our questions, the Committee read many articles about these products, and tried to contact other consortia to ask their success with them. We made much use of other institutions and consortia RFPs which were online. A short bibliography follows at the end of this column.

In January the Committee arrived at a short list of vendors from whom we wanted trial sites customized with LOUIS' list of databases. Demos were scheduled for late March with one day for three federated search products and the following day for three link resolver products. Via email lists, we invited people from the LALINC member libraries to attend.

We asked all attendees to fill out evaluation forms immediately after each demo, and collected

them at the end of each day. Surprisingly, the rankings and comments from all attendees, including staff from all areas of the libraries, as well as the Committee, were in accord. The Committee continued to test the final products for a couple more weeks, and then made a ranked recommendation to LOUIS by May 1. The prices negotiated were such that LOUIS could purchase both products. Final contracts are in progress and implementation has begun.

A few articles of interest:

“Usability and Interface Issues for Federated Search Systems and Open URL Resolvers”

<http://www.library.northwestern.edu/reference/linking.html>

Bowen, Jennifer, Judy Briden, Vicki Burns, David Lindahl, Brenda Reeb, Melinda Stowe, and Stanley Wilder. “Serial Failure.” *The Charleston Advisor* 5, no. 3 (January 2004): 48-50, <http://www.charleston-co.com/features.cfm?id=146andtype=ed>

Chudnov, Daniel, Jeremy Frumkin. “Service Autodiscovery for Rapid Information Movement.” <http://curtis.med.yale.edu/dchud/writings/sa4rim-orig.html>

Fryer, Donna. “Federated Search Engines.” *Online* 28, no. 2 (March/April 2004): 16-19, <http://wilson-txt.hwwilson.com/pdfhtml/01340/wyr0t/8sb.htm>

Grogg, Jill E. “Linking in the Traditional Online World.” *Searcher* 12, no. 6 (June 2004).

Jasco, Peter. “Internet Insights – Thoughts about Federated Searching.” *Information Today* 21, no. 9 (October 2004): 17.

Pace, Andrew. “Technically Speaking: Much Ado About Metasearch.” *American Libraries* (June/July 2004): 92-93.

Solomon, Marc. “A Confederacy of Databases: Federated Search Flying under Many Flags.” *Searcher* 12, no. 7 (July/August 2004): 24-9, <http://wilson.txt.hwwilson.com/pdfhtml/04926/zddpi/8sb.htm>

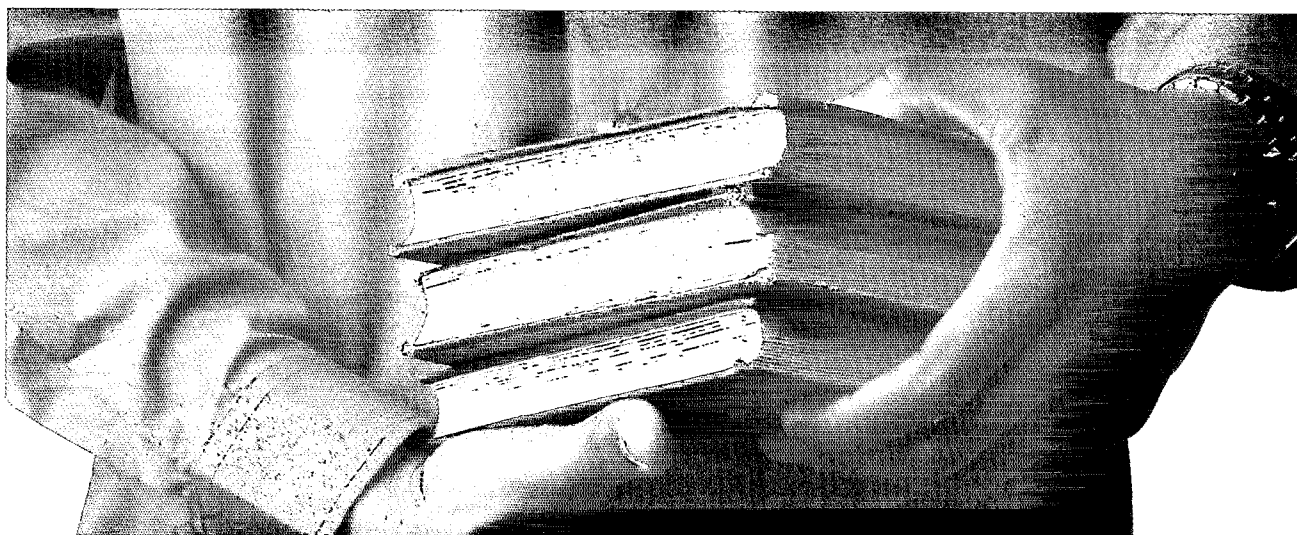
Tallent, Ed. “Metasearching in Boston College Libraries: A Case Study of User Reactions.” *New Library World* 105, no. 1 (2004): 69-75, http://escholarship.bc.edu/library_pubs/1/

Wadham, Rachel L. “Federated Searching.” *Library Mosaics* 15, no. 1 (January/February 2004): 20, <http://wilson.txt.hwwilson.com/pdfhtml/01871/4vt66/ksq.htm>

Webster, Peter. “Metasearching in an Academic Environment.” *Online* 28, no. 2 (March/April 2004): 20-3.

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