

# **Metasearch: What It Is, What It Could Be, and How Standards Can Help Us Get There**

Thursday, October 30, 2003

- 7:30 - 8:30**                    **Registration and coffee**
- 8:30 - 8:40**                    **Welcome, Pat Harris, NISO Executive Director**
- 8:40 - 9:20**                    **An Overview of the Metasearch Environment**  
Roy Tennant, California Digital Library
- What is metasearching, what it can be, who are the providers, what are the basic product features?
  - What is the potential impact on business models, on how our industry creates and distributes content, and on how librarians and end users access information?
- 9:20 - 9:25                    Questions and Discussion
- 9:25 -11:30**                    **Panel 1: Selecting, Implementing and Introducing a  
Metasearch Product: the Library Viewpoint**
- Selecting a metasearch product  
Beth Forrest Warner, University of Kansas
- The internal process
  - What are you trying to accomplish
  - Understanding the options
  - Functionality options
  - Using your ILMS product vs. evaluating other options
  - Using an RFP effectively
- Using metasearch software not bundled in an ILMS  
Wayne Hay, Westchester Library System, NY
- The pros, the cons
  - Capability checklist—is your library a candidate?
  - What it takes to do this successfully
  - Integration issues
  - Customization capability
  - User survey, usability concerns
  - The consortium perspective
- 10:15 - 10:40                    **Networking and Coffee Break**

**10:40 - Panel 1 continues:**

Implementation and Introduction to Users

Bob Gerrity, Boston College

- Technical requirements for the vendor, for the library, for the ILMS, for the consortia
- Library staff involvement—who does what; how can you prepare in advance? Timetables for getting the job done
- Customization capability
- User survey, Usability concerns
- Options for introducing users

The Unbundled Option from a Corporate Library Perspective

George Curran, Information Center, Pfizer Inc,

- Using metasearch software not bundled in an ILMS
- The pros, the cons
- Capability checklist—is your library a candidate?
- What it takes to do this successfully
- Customization capability
- User survey, usability concerns

**11:30 - Panel 2: Our Business Partners Respond**

**Avoiding Pitfalls, Following Best Practices – Voices of Experience**

- Selection
- Implementation
- Customization
- Maintenance

NISO Metasearch Initiative Planning Committee

- Peter Noerr, MuseGlobal
- Paul Cope, Auto-Graphics, Inc.
- Jennifer Hansen, WebFeat

12:15 - 12:45 Questions for Panel 2 and Discussion with Panels 1 and 2

**12:45 - 2:00 Lunch and Networking Break**

**2:00 - 2:25 The Publisher/Content Provider Viewpoint**

A publisher explains what it takes to comply, assesses benefits, and outlines challenges.

Bruce Heterick and David Yakimischak, JSTOR

**2:25 Panel 3: New Standards and Guidelines Underway from NISO**

- Overview of How NISO Works  
Pat Stevens, OCLC, chair, NISO Metasearch Initiative Planning Committee and Chair, NISO Standards Development Committee
- Access Management and Authentication  
Ted Koppel, The Library Corporation
- Identifying Collections  
Pat Stevens, OCLC
- Search and Results Sets  
Sara Randall, Endeavor

**3:45 - 4:15 Refreshment and Networking Break**

**4:15 Panel 3 continues:**

- Impact on Usage Statistics and Solutions  
Brad Buckley, Thomson/Gale

**4:40 - 5:00 Wrap Up and Summary**

Pat Stevens

**5:00 - 5:30 Open Discussion with speakers from the entire day**

**5:30 Workshop Adjourns**