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California Institute of Technology

# Linking/Metasearch Requirements NASA Unilibrary Meeting

**JPL Library, Archives & Records Section**

**July 27, 2005**

Library,  
Archives,  
and  
Records

Section 273





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Companies	Linking product	Federated Search product	URL	Notes
<b>Serials Solutions</b>	Article Linker	Central Search	<a href="http://www.serialssolutions.com">http://www.serialssolutions.com</a>	
<b>Exlibris</b>	SFX	MetaLib	<a href="http://www.exlibris-usa.com/">http://www.exlibris-usa.com/</a>	
<b>Endeavor</b>	Linkfinder Plus	ENCompass for Resource Access	<a href="http://www.endinfosys.com">www.endinfosys.com</a>	
<b>EBSCO</b>	Link Source	None-and no plans for one	<a href="http://www.ebsco.com/atoz/Link Source.asp">http://www.ebsco.com/atoz/Link Source.asp</a>	
<b>Infotrieve</b>	ArticleFinder eXtreme		<a href="http://www4.infotrieve.com/products_services/databases/afx.asp">http://www4.infotrieve.com/products_services/databases/afx.asp</a>	
<b>SIRSI</b>	SIRSI Resolver		<a href="http://www.sirsi.com/Solutions/ProdServ/Products/resolver.html">http://www.sirsi.com/Solutions/ProdServ/Products/resolver.html</a>	
<b>MuseGlobal</b>	N/A		<a href="http://www.museglobal.com/">http://www.museglobal.com/</a>	Sells technology to other vendors, not to libraries directly
<b>WebFeat</b>	N/A		<a href="http://www.webfeat.org">http://www.webfeat.org</a>	Customer base is largely public libraries
<b>U of NC - Greensboro</b>	Journal Finder		<a href="http://journalfinder.uncg.edu">http://journalfinder.uncg.edu</a>	Most subscribers are NC universities
<b>The Colorado Alliance</b>	Gold Rush		<a href="http://grweb.coalliance.org">http://grweb.coalliance.org</a>	
<b>Fretwell-Downing Informatics</b>	OL2		<a href="http://www.fdggroup.com/fdi/products/vdx4.html">http://www.fdggroup.com/fdi/products/vdx4.html</a>	UK company
<b>Openly Informatics</b>	1Cate		<a href="http://www.openly.com/1cate/">http://www.openly.com/1cate/</a>	
<b>Innovative Interfaces</b>	WebBridge		<a href="http://www.iii.com/mill/digital.shtml#webbridge">http://www.iii.com/mill/digital.shtml#webbridge</a>	



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JPL Library - Linking and Metasearch Requirements	Importance (5=high, 1=low)
<b>General Requirements</b>	
Database must be easy to maintain. Publisher-initiated changes updated automatically.	4
Product must have web based user interface compatible with standard browsers on PC, Mac, and UNIX OS	4
<b>Technical Support</b>	
Responsiveness of tech support staff (contact methods: email, phone)	4
Price - tier levels?	3
Customer discussion list	2
Documentation	4
Debugging capabilities built into the product? (e.g. View XML button in the ENCompass product)	2
<b>Local Hosting</b>	
Purchase price	1
Annual maintenance fees	1
Cost of development/test system	1
Activity fees and/or usage limits	1
Trial version available	1
Training for JPL staff	1
Hardware sizing	1
Performance	1



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<b>JPL Library - Linking and Metasearch Requirements, cont'd</b>	<b>Importance (5=high, 1=low)</b>
<b>Vendor Hosting</b>	
Purchase price	4
Annual maintenance fees	3
Access to next generation preview system	2
Activity fees and/or usage limits	4
Trial version available	4
24/7 availability - User/Admin	5/3
Maintenance during non-working hours	4
Up hours statistics	3
Availability figures for all working hours	3
UPS Power	4
Redundant networks	4
<b>Vendor Hosting, cont'd</b>	
Backup servers	4
Secure location(s)	4
Transparent scalability	3
Transparent OS and/or software upgrades	3
Multiple data centers, preferably in different geographic locations	3
<b>Authentication/Authorization</b>	
Ability to work with LDAP or other JPL systems	2
Granularity of control-Documents resource-repository level, full text document, references	2
Granularity of control-People-IP address, username/password, other	2
Ability for metasearch products to support linking	4



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JPL Library - Linking and Metasearch Requirements, cont'd	Importance (5=high, 1=low)
<b>Implementation</b>	
Ability to load local holdings from Excel	4
Ability to transition to other vendor - return of knowledgebase/holdings list	4
Cost of scalability (adding connectors)	3
Short implementation schedule (90 Days)	4
<b>Searches</b>	
Number of repositories that can be simultaneously searched by the product?	3
For meta search products, is there the ability to limit the rate of queries to particular internal repositories in order to prevent overloading the repositories?	2
Meta-data/Field searching capable	5
Limit to number of simultaneous users?	4
Results list include database summaries	4
Must be able to search on document date ranges	2
Search results may be saved	2
Results display - screen scraping or not	4
Ability for user to cancel search	5
Configurable timeouts (administrator vs. user)	4
Method for merging and de-duping	4
Results - ranking of results customizable by library	4
Method for displaying results? Explain. (fastest first, etc.)	4
Boolean logic available? Implied "and"	2
Explain search algorithm. (I.e., which fields searched)	2



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JPL Library - Linking and Metasearch Requirements, cont'd	Importance (5=high, 1=low)
<b>Reporting</b>	
What database usage statistics are available? Level of detail. Explain.	4
What patron usage statistics are available? Level of detail. Explain.	4
Choice of output for reports? Customizable? Explain.	3
Capable of publishing reports directly to webpage or other application.	3
Changes to journal lists are updated dynamically on web site. A - Z list	5
Data conversion from current system into vendor database?	1
<b>Security</b>	
Support https://?	2
<b>Admin</b>	
Administrative tasks must be well documented and easy to follow.	4
Multiple Administrative Accounts	3
Vendor tracks and proactively updates publisher changes, including connectors.	4
<b>Reliability</b>	
What is uptime percentage?	4
Mean Time between Failures?	4



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JPL Library - Linking and Metasearch Requirements, cont'd	Importance (5=high, 1=low)
<b>Interface issues</b>	
Interfaces with commercial databases: CSA, Ei Village, WoK (modify Caltech license?)	5
Interfaces with ILLiad (both from site-licensed bibliographic databases into ILLiad request and from ILLiad input screens out to e-journal article)	4
Interfaces with Sirsi Unicorn (also both ways -- take request for item and import to ILLiad or give info back to requester if item is available locally)	4
Customizable by library staff/vendor	3
Customizable by patrons	2
OpenURL compliant	5
Number of connectors that are provided with subscription	3
Types of connectors supported-Product specific API	3
Types of connectors supported-Major database connectors (MS SQL Server, MySQL, Oracle, ect)	3
Types of connectors supported-XML	3
Types of connectors supported-Z39.50	3
Types of connectors supported-SRW (Search Retrieve Web service)	3
Types of MySQL connectors	3



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# JPL Library Meta Search And Linking Requirements Checklist

## 1. Goal

The primary purpose of the Linking/Metasearch application is to provide simple access to journal articles, conference papers, books, and other similar documents. The application will provide single search capability of multiple commercial and proprietary databases. The application will be able to provide basic statistical reports, as well as customized reports, and offer links to full-text documents when this information is available. The application will provide added functionality for users who need to immediate assess to information.

## 2. General Requirements

2.1 The database must be easy to maintain. Publisher-initiated changes should be updated automatically.

2.2 The product must have a web based user interface compatible with standard browsers (e.g. Netscape, MSIE, Mozilla, Safari...) on PC, Mac, and UNIX/Linux OS platforms

## 3. Technical Support

3.1 Tech support staff must be available 24/7.

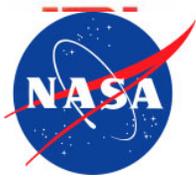
3.2 Product documentation must be provided

## 4. Vendor Hosting

4.1 The system must be available 24/7, except for maintenance during non-working hours (6:00pm – 7:00am)

## 5. Authentication/Authorization

5.1 IP recognition must be supported



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# JPL Library Meta Search And Linking Requirements Checklist, cont'd

## 6. Implementation

6.1 Ability to load local holdings from Excel must be included

## 7. Searches

7.1 Must be able to search at least 8 commercial databases simultaneously

7.2 Must be meta-data/field searching capable – author, title, date range

7.3 User must be able to select databases to search

7.4 Product must support Boolean logic and phrase searching

7.5 Configurable timeout by administrator must be supported

## 8. Reporting

8.1 Standard reports, i.e., number of searches, number of unique users, number of searches per database, and number of unique sessions must be supported

8.2 Customized reports and/or statistical data must be exportable in CSV format

## 9. Admin

9.1 The Library will have administrative control of the database





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## JPL Library Meta Search And Linking Requirements Checklist, cont'd

### 10. Interface issues

10.1 Interfaces with ILLiad (both from site-licensed bibliographic databases into ILLiad request and from ILLiad input screens out to e-journal article)

10.2 Interfaces with Sirsi Unicorn (also both ways -- take request for item and import to ILLiad or give info back to requester if item is available locally)

10.3 The look and feel of the product must be customizable – the link button must be customizable

10.4 OpenURL compliance must be implemented in the product

10.5 The product must support XML and Z39.50

