

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