

# DIGITAL LETTERS

*A Newsletter of the UCSD Libraries Digital Library Program*

September / October 2002

Issue Number Two

## Letter From the Editor

Welcome back to Digital Letters, the newsletter intended to help UCSD Libraries' staff keep up-to-date with our Digital Library Program. With this issue, DL is officially bimonthly (making this issue officially late!).

Thanks to all who wrote in with comments and criticism of issue number one. Please keep those cards & letters coming to [splawson@ucsd.edu](mailto:splawson@ucsd.edu).

This issue, the focus is on Scholars Portal. In these pages you will find an overview of the Scholars Portal project which incorporates an interview with UCSD Scholars Portal Team Chair Jenny Reiswig, as well as a special interview with University Librarian Brian E. C. Schottlaender on his involvement in Scholars Portal.

Buzzword Bingo is on vacation; it will return in the November / December issue.

Many thanks to Brian and Jenny for the interviews. Editorial oversight for Digital Letters is provided by Anna Gold and Dawn Talbot, but the whole darn thing is written by me (i.e., if there's something wrong, it's my fault).

— Steve Lawson

## *Digital Letters Interview with Brian E. C. Schottlaender*

Back in August, I had a chance to meet with Brian and ask him about his involvement in the Scholars Portal project. What follows is an edited transcript of our conversation.

**Digital Letters:** *You've made some presentations on Scholars Portal at national library meetings, and you're strongly associated with Scholars Portal in the minds of the staff at the UCSD Libraries. What got you excited about Scholars Portal and made you want to really push it forward?*

**Brian E. C. Schottlaender:** Thereby hangs an interesting tale. I arrived at ARL [the Association of Research Libraries, of which UCSD is a member] for my first meeting as an ARL director and I wandered into a discussion group on Scholars Portal. I didn't really

*(Continued on page 2)*

## Scholars Portal: The Inside Story

At the UCSD Libraries, we have been hearing about Scholars Portal for well over a year now. We all know that it is a project in which University Librarian Brian E. C. Schottlaender is deeply involved, but what exactly is Scholars Portal?

If it has seemed like Scholars Portal was shrouded in mystery, that's mainly because up until now, there has been nothing concrete to point to when talking about the project. That's all changing this quarter, as the Libraries begin to work hands-on with the software that makes up the current version of Scholars Portal.

The Scholars Portal concept was first articulated in a 1999 "white paper" by Jerry Campbell, the Chief Information Officer and Dean of University Libraries at the University of Southern California. In that paper, (available on the web at <http://www.arl.org/newsltr/211/portal.html>) he urged the Association of Research Libraries (ARL) to pursue a project that would "provide access to the highest quality content on the Web," by building a tool that would search across scholarly databases, specialized academic information resources, and scientific data sets. In addition, Campbell wrote that the Scholars Portal should provide associated services and tools for researchers, such as an online live reference service, document delivery, "experimental shared workspaces, and activities in support of alternative scholarly publishing."

It was, in short, an ambitious vision of a complete suite of online tools for the researcher or student, provided by the ARL libraries. The Scholars Portal project still has an ambitious agenda, but rather than trying to introduce such a complicated, multi-faceted portal all at once, Scholars Portal will start with the development of a "super discovery tool": an engine that will search across multiple "content pools" (generally article databases, but any group of structured data could qualify), collect the search results, remove duplicate records, and present the results to the user in a coherent way.

Jenny Reiswig, Electronic Services Librarian at the

*(Continued on page 3)*

On the back page: "Scholars Portal at a Glance." The people, the vendors, the timeline, suitable for framing!

## Brian E. C. Schottlaender: the Digital Letters Interview

*(Continued from page 1)*

know much about it, except I was surprised to learn that, conceptually, it was predicated on two nascent portal initiatives in the country, one of which was our own Sage.

So I'm hearing that "UCSD and Cornell have taken it this far, and wouldn't it be nice to take it further." I came back and I talked to Phyllis about it, and I told her that I had some concerns about the shape the discussion was taking. So Phyllis in her infinitely wise way, said "the best thing to do in that event is to get involved, because then you can actually help it take a shape that you are more comfortable with."

I thought that what they were talking about sounded very similar to the ambition that UCSD had for Sage. We never quite got there, but we sure put a lot of thinking into it. For me, Scholars Portal has the potential to actualize what we were trying to do with Sage from the get-go on an even grander scale, which is that Holy Grail of integrated, seamless access, the "one-stop shopping" concept.

I began to get particularly interested in post-discovery portal functionality. I became convinced that discovery was all well and good, but once you've discovered a bunch of stuff, then what? I became convinced that there were a variety of things that academics wanted to do with the items they had discovered. So I began to focus on post-discovery functionality, even though the initial focus of the ARL Scholars Portal implementation is discovery.

**DL:** *Are there any concerns about funding an ambitious project like Scholars Portal given the State of California's budget deficit?*

**BECS:** I am only putting discretionary money to this project. I am being careful about reserving discretionary money to stimulate innovation, while reserving the "library money," if you will, for core functions.

With the advice of the Admin Team, I negotiated when I came to UCSD for some discretionary funds specifically to stimulate innovation in digital library development. Not surprisingly, this small pot of money has come to be called the "Digital Dowry." Since 2000, the Dowry has been used to fund slide digitization in the Arts Libraries and image conversion and text markup on the CEO (California Explores the Ocean) Project at SIO.

I plan to use the Dowry's remaining balance, in combination with other discretionary monies, to fund our participation in the ARL Scholars Portal Project.

**DL:** *What do you think the impact of Scholars Portal will be on both the Libraries and the researchers who use the Libraries in both the near and far term?*

**BECS:** In the very near term I think there will be very little impact on either side of that equation, with the

exception of Jenny Reiswig, her team, and the people she decides to pull in to help put the software through its paces. And I say that because we have no intention of deploying Scholars Portal publicly before fall of 2003. So, for a year it's going to have little impact on anyone but probably a dozen people.

If it does what it is intended to do and what its vendor says it can do, I think it will have considerable impact on the UCSD user community in the longer term.

We've been having a very interesting exchange of correspondence with a faculty member in IR/PS who happens to be chair of the UCSD Academic Senate Information Technology Committee and who is a member of the Academic Senate Library Committee; his name is Roger Bohn. And he's told us (I'm paraphrasing), "There's a ton of information out there which you guys make available in a ton of different ways, the result of which is no one can find anything. We're completely overwhelmed."

If Scholars Portal does what we hope it will do, that ought to obviate all that, because there ought to be one place you go look for everything. Now you and I know that operationalizing that is very different from philosophizing about it, but if it works in any way, shape, or form, I think it's going to have a substantial impact.

There is that button on the Google page that says "I'm Feeling Lucky." I have this view of our having on our home page what we have now—Roger, Sage, the e-journal list—and "Are You Feeling Lucky?" and that would be Scholars Portal. That will obviate your need to figure out where you want to search.

**DL:** *So you don't see Scholars Portal taking over for Roger?*

**BECS:** I see it in the near term as an additional search alternative.

I met a couple of weeks ago with the Catalog Department and was talking with Paul Weiss about the fact that for generations we've prided ourselves as librarians on providing as many avenues of access to resources as we possibly could. And our users are now saying "OK, can you stop that now? Please, no more avenues!" [laughter]

And the students tell us they use the fastest avenue they can find, namely Google. It's got one box. I would be very happy, frankly, if Scholars Portal did as good a job of discovery as Google but with better resources behind it. Google is searching a high preponderance of open Web material; it's not searching the deep Web, it's not searching the academic resources that we pay for, it's not searching all the stuff we think people ought to have.

**DL:** *What about the longer-term impact on the Libraries staff?*

**BECS:** The positive potential implication for librarians here is that they may see the promise of Sage fully

actualized.

For the last three years, we in our digital library development have been very much focused on integration. To me, Scholars Portal is entirely in line with that strategic emphasis, as its ambition is to allow on-the-fly integration at the front end. Thus, in my mind, Scholars Portal is entirely in line with what we have been working towards.

*DL: How about the more long-term impacts of Scholars Portal on the way scholars actually work? What effect will it have once it is fully realized with post-discovery tools and everything else?*

BECS: I think the potential to revolutionize the way people do work is going to be there; how many generations [of software development] it will take to make that happen isn't entirely clear. We had all those people in to talk to us in the context of the strategic planning retreat, and we heard "I don't want to have to leave the lab," or "I don't want to have to leave my machine." If you don't want to leave your machine, that means that you don't want to have to go Xerox anything, and you don't want to even have to get a highlighter out, you want to do it all online. So if we can facilitate your

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## Scholars Portal: The Inside Story

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*(Continued from page 1)*

Biomedical Library and chair of UCSD Libraries' Scholars Portal team, sees Scholars Portal as an exciting next step for the UCSD Digital Library Program. "I think we are a really great place to be doing this because we created Database Advisor," the cross-database searching tool that went on to become CDL's SearchLight. "We've been doing multi-database-searching-super-discovery tools since 1997!" And as Brian Schottlaender points out, UCSD Libraries' Sage was one of the tools that ARL looked to for inspiration in the early discussions of Scholars Portal (see the interview with Brian elsewhere in this issue of Digital Letters).

### Scholars Portal partners

Unlike those earlier projects, the UCSD Libraries aren't going it alone on this one. In addition to UCSD, the libraries of Arizona State, Dartmouth College, Iowa State, University of Arizona, University of Southern California, and the University of Utah are participating in the first stages of the project. Also unlike those earlier UCSD projects, the Scholars Portal libraries have contracted with a vendor, Fretwell-Downing Informatics (FD), to provide the search engine and programming that will be needed to create the Scholars Portal.

Scholars Portal will be based on several existing FD products, including ZPORTAL, Z2WEB, and Z'MBOL, all of which work together to allow searching over different kinds of content pools. Jenny said that these products haven't yet been used in large academic libraries: "Fretwell-Downing has been using these products with library networks and smaller clients, but they haven't put them out in the ARL environment before." Jenny says that FD will be learning from this project, too. "They had found with their other clients that people wanted to have their own customized, individual portals. What we're telling them is, no, most of our users will not create their own profile, and we need to pay a lot of attention to the large numbers of students who will not create a personal profile."

### Starting slowly, building experience

Jenny says that UCSD Libraries will "start fairly slowly" when it comes to rolling out Scholars Portal locally. Brian agrees, saying that "One thing we're doing that is a little unusual is keeping Scholars Portal in-house for a year." The UCSD Libraries Scholars Portal team is currently installing the hardware needed to run Scholars Portal and version 2.3 of the FD software. During fall quarter, the team will go through training from FD and begin testing the software and creating a "wish list" for future versions. The UCSD group will develop the list of "target" databases that Scholars Portal will use initially, and will set the local default options for searching, such as how Scholars Portal will handle removing duplicate records from search results and things of that nature.

In the Spring of 2003, the UCSD Scholars Portal team will continue to test the software, and make decisions about how the interface should work. Each of the seven participating ARL libraries will have an equal say in deciding the additional features and functions of the software, which will be implemented by FD. All seven libraries will be using the same software with the same features, but each library will be able to exert a greater amount of control over the local look and feel.

Throughout this year-long in-house testing period the Scholars Portal team will be asking UCSD Libraries staff to volunteer to help test the software and to give input on the features, performance, and appearance of the tools.

Brian says that UCSD Libraries intend to "road-test" the software in the classroom. "In Fall 2003, we have plans to hook up with the Sixth College writing program and try to conduct a structured experiment with them." Brian hopes that such an experiment could begin to provide data to help answer the question "Do these things that the Libraries create for people actually make a difference to their learning?"

In the initial "rollout" of Scholars Portal, Brian says that the Libraries will be trying to find out "who uses it, and

*(Continued on page 4)*

## Scholars Portal at a Glance

### UCSD Personnel:

ARL Portal Working Group: Brian E. C. Schottlaender,  
University Librarian

UCSD Libraries Admin Team Sponsor: Luc M. Declerck,  
Associate University Librarian, Technology and Technical  
Services

UCSD Scholars Portal Team: Jenny Reiswig, Chair (BML),  
Chris Frymann (SED), Christine Bagwell (ACS), Jim  
Jacobs (RES), Steve Lawson (S&E), Kari Lucas (CLICS),  
Paul Weiss (CAT)

### Partners:

The Association of Research Libraries (ARL)

6 ARL Libraries: Arizona State, Dartmouth College, Iowa  
State, University of Arizona, University of Southern  
California, and the University of Utah

Fretwell-Downing Informatics, software vendor

### Further Reading:

Both Brian and Jenny recommend the ARL website for  
Scholars Portal: <http://www.arl.org/access/scholarsportal/>  
There you will find Jerry Campbell's original white paper,  
several PowerPoint presentations by Brian Schottlaender, and,  
for the best summary of Scholars Portal activities through this  
past spring, the *ARL Scholars Portal Working Group Final Report*.

Brian also recommends *Improved Access to Electronic and  
Traditional Resources*, a publication containing the text of  
presentations made at a seminar for ARL directors at the 2002

Midwinter meeting of ALA. I have a copy of this publication  
which I can loan to any interested parties.

### Timeline:

#### Fall 2002

- Sun Solaris server installed
- Version 2.3 of Scholars Portal Software downloaded from  
Fretwell-Downing, installed and preliminary tests run
- Scholars Portal Team training begins at UCSD
- Off-site technical training in scripting, open-linking
- Scholars Portal Team tests the software with a small  
group of "target" databases

#### Winter 2003

- Testing continues
- UCSD Libraries staff are asked to help test and give input  
on desired target databases, interface, features, etc.

#### Spring 2003

- Version 3.0 of Scholars Portal software released

#### Fall 2003

- Scholars Portal may be used in structured experiment  
with Sixth College writing classes
- Possible rollout on public Libraries web pages

#### Fall 2003- Summer 2005

- Continued testing, use, and evaluation of Scholars Portal

#### Summer 2005

- End of ARL contract with Fretwell-Downing

*(Continued from page 3)*

what do they like about it? If they don't use it, why don't  
they use it? That's when we'll really go in to the full-bore  
evaluation phase. We'll have at least a year and half to do  
that," before the end of the Scholar's Portal contract  
with Fretwell-Downing.

### So what does this mean for library users?

Once UCSD's Scholars Portal is available, what will it  
mean to the average user? To begin with, a student  
would not have to know which specialized databases to  
search, and wouldn't have to worry about repeating her  
search in multiple databases; she could do it all with  
Scholars Portal. She wouldn't even have to understand  
the difference between the library's catalog and  
abstracting and indexing databases. The hope seems to  
be that Scholars Portal will allow the student to bypass  
information paralysis before starting her search  
(wondering "which database should I use?" or "will the  
catalog help me find articles or just books?") and give her  
the tools to avoid information overload after her search,  
through refining or limiting her search, and helping her  
get the full text or make an interlibrary loan request  
without ever leaving the Scholars Portal environment.

"What's going to be very interesting," Jenny says, "is

finding out what users will do with results that aren't  
from a homogeneous mix of bibliographic databases.  
What will it be like for a user that does a search and  
receives results from journal article databases, full text  
resources, electronic journals, art images. I think that's  
where some of the real synergy and integration are very  
exciting, but at the same time, what are they going to do  
with it? Talking to users and finding out what they  
would like to do with all this stuff is going to help us  
design the Portal."

But what if it doesn't work? Both Brian and Jenny  
emphasized that UCSD won't be stuck with a product  
that doesn't work properly. Jenny noted that "this group  
of ARL libraries is going with this vendor on this project,  
and we'll see how it goes. It's a finite project with a  
three-year life span, and we expect to learn a lot and find  
out what these products can do."

If it does work, though, we can expect to see continued  
innovation as the tools improve and expand. Brian has  
been researching "post-discovery" tools, and had made  
several presentations on the topic. It will certainly take  
several years, but Scholars Portal may yet fulfill Jerry  
Campbell's original idea of a complete suite of electronic  
research tools. ■