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ATG Interviews Sara Randal and Harry Samuels

Sara Randall (Manager, Digital Library Product Management, Endeavor Information Systems)

Harry Samuels (Digital Library Projects Coordinator, Endeavor Information Systems)

by Rick Lugg and Ruth Fischer (R2 Consulting, 63 Woodwell’s Garrison, Contoocook, NH 03229; Phone: 603-746-5991; Fax: 603-746-6052) <rick@r2consulting.org> www.ebookmap.net

TOPIC: Open URL Linking for

Collections and Technical Services

In our series of articles on the Virtual

Approval Plan concept, which appeared in

the June 2002 issue of ATG, we explored in
general terms tools that might be used to
create links from a library selector’s inte-
grated library system (ILS), or other source,
to a range of extended metadata and ser-
VICES—allowing a library selector or acquisi-
tions staff member to access additional
data and services.

In past issues, we’ve looked more closely
at specific tools, including WebBridge (de-
signed and built by Innovative Interfaces)
and SFX (owned by Ex Libris). In this in-
terview, we’ll look at LinkFinderPlus, the
link resolver offered by Endeavor Informa-
tion Systems.

A link resolver such as LinkFinderPlus
accepts a query from an OpenURL-enabled
source, and, using a library-maintained da-
Tabase of links, presents the user with a list
of available resources [targets]. Once the
user selects a target, the link resolver di-
 rects the user to the target, retaining the
metadata captured from the source. Con-
figuring and maintaining target resources
in the link resolver are among the most im-
portant tasks in making this sort of resource
linking effective. In the conversation that
follows, we’ll focus on options for popula-
ting and maintaining those links. First, some
background:

ATG: LinkFinderPlus is one component
of the ENCompass system. Could you briefly
describe ENCompass and how the components
relate to one another?

SR & HS: We usually talk about three com-
ponents. First, there’s ENCompass for Re-
source Access, which a lot of people refer to as
a federated search engine. The user sends a
single search to multiple databases, which brings
back all results in a single display in
ENCompass. It supports multi-protocol
searches, including Z39.50, XML Gateway, and
http. Second, ENCompass for Digital Collec-
tions, which allows libraries to provide their own
digital content over the Web. It also integrates
searches across those digital collections, the
library’s OPAC, and Z39.50 resources. The third
piece is LinkFinderPlus, which is an
OpenURL resolver. It can take input from
OpenURL source, and link the user to a desig-
nated target resource or service.

ATG: How many customers do you have at
present?

SR & HS: There are 96 LinkFinderPlus
sites, 75 of which are part of ENCompass instal-
lations, and the rest of which are standalone.

ATG: LinkFinderPlus, like its competitors,
relies on receiving requests in OpenURL for-
mall. That NISO standard is still under devel-
opment, from version 0.1 to 1.0 — can you
update us briefly on where that stands?

SR & HS: [Harry Samuels] is a member of
the NISO committee working on this. The Com-
mittee does have a timeline, which projects go-
ing to testing of version 1.0 of the OpenURL
standard this Spring.

ATG: In the meantime, though, 0.1 serves
the purpose?

SR & HS: Yes, 0.1 really is a de facto
standard.

ATG: Can LinkFinderPlus accept an
OpenURL request from any “valid” source?
Your literature specifically mentions
FirstSearch, ProQuest, EBSCOhost, Gale, and
Engineering Village as “proven” — but I as-
sume there are many more?

SR & HS: Yes, in fact we’ve tested with
more sites than appear in our literature right now.
It’s difficult to keep up with the number of sites
that want to provide this kind of interoperability.
We’ve yet to find a resource that sends out
OpenURLs where we can’t process it.

ATG: So there’s a specific testing process
Endeavor goes through with each source?

SR & HS: No, actually there isn’t. We’ll
do it if it’s been requested by the content pro-
vider or if there’s a mutual customer that
wants testing. But we got to a point where it
was just too difficult to try to keep up with
everyone who was announcing that they were
OpenURL-compliant. We’re really getting to a
stage where it’s more like the Z39.50 model,
where someone says they communicate
OpenURL (whether on sending or receiving end)
and interoperability is assumed.

ATG: Hm, sort of like a standard! And if
doesn’t work out, there’s some problem solv-
ing after the fact...

SR & HS: Yes. What we have run into
is that a user can optimize the OpenURL to
the different link resolvers out there, so that
a content provider may find that with
LinkFinderPlus, we can do this instead of
that, but it’s all within the standard.

ATG: What advantages do you think
LinkFinderPlus has that sets it apart from
other link resolvers? Are there things you
think it does especially well?

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Interview — Dekker

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the educational and research communities will
benefit ourselves as well.

ATG: So what has Dekker done to be pro-
active in the larger community?

DD: In 1997, we established the
Dekker Foundation with the goal of extending fi-
ncial support for educational and research pur-
poses. Because today’s struggling undergrad
universities are tomorrow’s Nobel Prize-winnng
physicists, we’ve established a number of scholarships
and fellowships in conjunction with well-recog-

nized academic institutions.

In addition to our larger awards, the Foun-
dation also makes annual donations to causes
such as Freedom of Speech, combating
homelessness, medical relief, literacy, and
environmental preservation. Even though these
issues may seem unrelated to Dekker’s objec-
tives as an STM publisher, as members of a glo-
bal community, we believe they are in fact all
very interrelated.

ATG: Tell us about David Dekker himself.
Do you have a family? What do you do for fun?

DD: I live in Weston, CT with my wife Jen,
a schoolteacher, and two great kids, a girl and a
boy. I try to introduce my kids to different
activities, so hiking and skiing are things we like
to do as a family. I strongly believe in having a
well-rounded and balanced life.

ATG: With your busy schedule, do you find
time for some pleasure reading?

DD: I’m currently reading Two for the
Summit, by Geoffrey Norman, which is a
memoir that reflects on an author’s relation-
ship with his daughter through their
shared experiences and love of climbing.
It’s well-written and touches on things
which are important to me, such as spend-
ing time with my kids, conservation, and
going out into nature.

ATG: Any final thoughts for our readers?

DD: I hope that I have provided some in-
sights on Dekker’s business practices and
philosophy and that libraries will continue to
actively work with good independent publishers
and not just the mega-corporations. We are
always interested in discussing Dekker as a
publishing choice for them.

<http://www.against-the-grain.com>
SR & HS: Well, one is ease of implementation. We offer a large database of pre-populated sources. We've just introduced a batch activation service, based on a file from a company like Serials Solutions, that allows a library to easily activate its e-journal subscriptions all at once.

For users, who want to get quickly from link to full text, we have an "invoke" feature. If the librarian sets a journal to "invoke," the OpenURL request doesn't bring up an intervening screen for the user to choose from — it takes them directly to the full text. We're finding that's very popular.

We also allow the library to organize the order in which the full text links appear. If there's a link they'd prefer their patrons to use, they can place that higher in the list. It gives the library control over the display of the information.

ATG: You mentioned "pre-population" of targets in LinkFinderPlus. Your literature states that it contains 11,000 such links — already worked out and tested with partners?

SR & HS: It's a little hard to say what a pre-populated link looks like, and actually there are more than that, when you think about the fact that each journal can appear in multiple sites. So, with a list of 13-14,000 journals, the number of targets is actually much higher. In our most recent release, we've provided full-text linking for aggregator-level articles, so the full text in things like ProQuest or Gale also dramatically increases the number of journals available.

ATG: Are all of the pre-populated links for e-journals or are there other kinds of resources there as well?

SR & HS: In LinkFinderPlus, the user can manage this full-text linking through the "knowledge base." For other types of links, LinkFinderPlus provides a separate database of "extended services." Within the system, we've given the customer a way to configure extended services pretty easily, but we also pre-populated some we thought would be useful, for example, title or ISBN searches into ILS systems, both ours and others. We pre-populated with syntax for Syndetic Solutions, Amazon, and other Internet searching.

ATG: In the screen shots you sent which are reproduced below, extended services are divided into Service Groups and Service Types. Could you describe the distinction?

SR & HS: Service groups are library defined, to organize extended services in ways that make sense to them. These examples are from our demo server — including categories such as "Check for Print Holdings," "Check Other Library Catalogs" and "Search the Internet" — but if you went out to a library site, they might have very different groupings.

The Service Types, including more specific options, like "Horizon Title Search" or "INNOPAC ISBN Search" are known search syntaxes — the only thing that changes is the server name to which the links resolve. All the library has to do to configure these is add the IP address or server name to that service type, and they don't have to do any additional work.

ATG: Are any of the pre-populated links especially popular among customers?

SR & HS: The widely-distributed services like JSTOR, Academic IDEAL (now part of ScienceDirect) — and of course, the links to the major aggregators.

ATG: Do they bring the user to a sign-on screen or deeper into the product?

SR & HS: For content providers that use IP authentication, of course, there's no issue. As long as the user is within the subnet of the customer, they can get in. Occasionally, you can embed login information into the URL you use to link with. And sometimes, you just have to sign in. IP authentication is probably the most common.

ATG: Your product information refers to "real-time validation" of links. Can you say a bit about how that works?

SR & HS: We have a check-box for each target, which if checked tells LinkFinderPlus to check the link before presenting it to the user. One of the things that frustrates users the most is dead links, whether the target is unavailable for an hour or a day. This checking eliminates dead links for the user.

ATG: So there's simply no link presented to the user if the link is broken at the time of the request?

SR & HS: Right. If that link doesn't validate, it won't be presented to the user.

ATG: Is there some kind of notification sent to the administrator to pursue a fix of a broken link?

SR & HS: Things like this are typically handled in our periodic updates to the database, so that users don't have to chase them down.

ATG: And how often do those occur?

SR & HS: It's really up to the individual sites. We maintain a master database, and LinkFinderPlus customers can obtain updates from it on whatever schedule they choose. From some of our content partners, we get updates every six weeks, but there are other links we can fix as we become aware of them. Customers can synch up with it and get any new links added and any changes we've made.

ATG: I'd like to hear more about what's involved in establishing a new target — let's say an extended service that's not pre-populated. If we imagine a library selector searching WorldCat who has found a citation for a book s/he wants to order, it should be possible to link from that citation to a Service Groups menu that includes "Search Book Vendor databases" or "Order from Book Vendor" and Services such as "ISBN Search in GOBI" or "Title Search in Collection Manager" or "Select in Cusatini Web" or "Order using OttoEditions" — assuming, of course, that these targets had been added to the LinkFinderPlus database. Can you describe the process a librarian would use to add targets?

SR & HS: Initially it would be a new extended service, and it's actually pretty easy. The administrator chooses "add" and in some cases could simply cut and paste the URL from the target site into that new extended service and replace the actual ISBN with a variable called "ISBN" to create the syntax.

The administrator can also specify a service name and description, add a graphic URL (like a logo), then the Web address where that service lives.

If individual or group login is required,
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the link might take the user to a sign-in screen,

and then continue the search or transaction.

ATG: When the search syntax needs to be worked out for a new target, does the library do that? Does Endeavor help them with it?

SR & HS: In general, the libraries would do that themselves, because they’re the ones who actually have access to the resource and can use the URLs that are going through to test it. On the other hand, we certainly have customer support that will help.

We’re also bringing up a resource sharing area on our customer Website, so that if one institution were to develop a link syntax for, say, GOBI, they could post it there for other LinkFinderPlus customers to use — so everyone doesn’t have to reinvent the wheel.

We’re currently working with our customers to understand the degree to which they want to see the Extended Services pre-populated. We do offer pre-populated sources now, but wonder when does it become more noise than help? So that’s one of the things we’re waiting to get feedback on.

ATG: What’s next for the development of this product?

SR & HS: We want to keep adding more targets, because the emphasis seems to be on full text and the number of full text sites you can link to. As much as we have, there’s room to add more.

We’ll also look at the area of extended services — we don’t have anything particular in mind right now, but there are some capabilities that we can further leverage. We also need to stress functionality that already exists but is underutilized — such as linking directly to the target without an intermediary page.

The LinkFinderPlus database captures a tremendous amount of information, and we’re also thinking about how else we might use it to support other library activities related to electronic resource management. So I think that’s a very interesting place to look at re-utilizing this information to help libraries avoid entering duplicate data in multiple places.

The batch activation feature which we’ve worked on with Serials Solutions has proved to be a popular, and labor-saving solution. The larger the library, the more electronic subscriptions, the more labor it saves. So we’re looking to partner with other companies in that same space. It’s a good opportunity for companies to team up and provide some added value.

ATG: Although we realize that OpenURL linking is predominantly a citation to full text product, we remain convinced that the same approach can save work in Acquisitions and Cataloging. Any comment?

SR & HS: In our Voyager system, we do provide support for OpenURL linking from the Acquisitions and Cataloging clients. That allows use of the same search terms in a third-party system like those of the jobbers or that kind of thing. OpenURL resolution would make sense — although the solutions for a library staff member would look different from that for an end user.

ATG: Let’s close with a little speculation. What sort of convergence do you see between traditional ILS systems and this new generation — which is more focused on federated search and linking?

SR & HS: We’re already seeing in RFPs for traditional library systems that if you don’t offer federated search and OpenURL linking, you’ll probably have a harder time playing. So we are seeing these requirements, and I think the challenge is to make sure that these components “play well” with standard integrated library systems.

ATG: Do you see them replacing the traditional ILS?

SR & HS: I don’t think so, because you still need all the back-office functionality and transaction support for acquisitions and circulation etc. that you get in a traditional system. I think what’s likely to change is the OPAC — perhaps the OPAC will be less centered on the traditional print collection and provide a much more expansive view of the world of information that the library owns or licenses on behalf of its users.

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Editor’s Note: Watch for our interview with Roger in the June issue of ATG. Coming Soon! — KS

Name: Roger Press
Born & lived: UK and US.
Early life: Passionate about piano.
Family: Wife Tamara, Fellow at Clare College, Cambridge (English Literature — Ph.D. on Henry James) and two wonderful sons.
Education: Oxford plus University of Life.
First job: Bus boy at Mortimer’s Restaurant, New York.
Professional career and activities: Ensuring classical music is accessible and enjoyable.
In my spare time I like to: Rollerblade in Hyde Park with my children and play the piano.
Pet peeves/what makes me mad: When London is not cold enough for snow to stay on the ground!
Philosophy: Art (paintings, music, dance, theater, literature) enables people to function.
Most meaningful career achievement: Starting up Classical.com.
Goal I hope to achieve five years from now: Classical.com in every library.
How/Where do I see the industry in five years: In five years the music industry expects to sell a significant proportion of its recordings in digital formats, which customers will access using computing devices. One could say that the next format (after Vinyl, Tape and CDs) is the digital format. People can listen to music online or with various devices (PCs, mobile phones, PDAs, MP3 players etc.). The Classical.com service enables libraries to be part of this future of digital music by offering a compelling collection of classical music recordings and reference materials to their communities. Remote access to the Classical.com database through the Library will enable library patrons to access the service “without walls” ensuring that libraries remain an important part of their communities, reaching into peoples’ lives.