

CASE STUDY



CSU The California State University
WORKING FOR CALIFORNIA

Metasearching to Perfection—MetaLib at California State University

The California State University is the largest system of senior higher education in the United States. The CSU is renowned for the quality of its teaching and for the job-ready graduates it produces. Its mission is to provide high-quality, affordable education to meet the ever-changing needs of the people of California.

Challenges

One of the largest library consortia in the United States, CSU required a solution that would help it take advantage of resource-sharing arrangements among member institutions. Introducing the metasearch concept to the CSU professional community was another great challenge.

Solution

When MetaLib was finally introduced to library staff, it was an easy sell. Librarians appreciated the outstanding metasearching and resource

Committed to making its libraries as efficient as possible, the California State University (CSU) library consortium identified the need for a federated search system as early as 1997. That year, the consortium set out to build a customized metasearch system in cooperation with a software vendor. After five years of trials and experimentation, CSU decided that the time was right to take a look at commercial solutions. Although its past efforts had not resulted in a finished product, CSU had learned a great deal from the experience and had defined a list of requirements to serve the libraries at its 23 campuses across the state. From that point on, the consortium took very little time to recognize that the Ex Libris MetaLib® gateway and metasearch system for accessing electronic collections was just what CSU needed.

“In 1997 we had a vision, but we couldn’t go shopping for it since no such system was available,” says Marvin Pollard, project manager of the Unified Information Access System at CSU. “When we decided to review the market in 2002, it was clear that MetaLib fit the bill in terms of both functionality and technology.”

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While finding the right system may have been easy, introducing the concept to the CSU professional community was a far greater challenge. “We knew that a system like MetaLib would be controversial among librarians, who are highly trained and take their responsibilities as professional online searchers seriously,” Pollard explains. “For them, MetaLib was a threat, and without their support it wouldn’t succeed, even though we were convinced that end users would take to the application immediately.”



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organization capabilities of MetaLib.

Results

For a system that stirred debate before it was first introduced, MetaLib is a fixture at CSU and is expected to stay that way for a long time to come. People see it and say they want it. MetaLib uncompromisingly delivers on our vision of 10 years ago.

Customization Is Key

When MetaLib was introduced to the librarians, it was an easy sell. "In addition to appreciating Metalib's outstanding metasearching and resource organization capabilities, librarians liked the fact that the product links to native interfaces and facilitates the building of customized Web pages, traditionally a time-consuming and complex task," notes Pollard. "The ability to customize Web pages so they have the same look and feel as library pages has been a key to MetaLib's success. For example, we added Metalib entry points on every Web page; these entry points in essence turn the system into a library Web site engine."

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The add-on MetaLib X-Server module—a set of XML-based application program interfaces (APIs)—enables staff to easily customize MetaLib by accessing functionality from other consortium applications such as the university portal, course management systems, and CSU Web pages. Pollard explains, "We've developed a number of applications using X-Server that take advantage of the system's knowledge base by adding metasearch capabilities that increase resource usage. By leveraging X-Server, we were able to customize and improve MetaLib's basic interface to give the application greater functionality and allow users to more easily discover and access our e-collections."

Flexible Consortial Support

One of the largest library consortia in the United States, CSU also required a solution that would help it take advantage of resource-sharing arrangements among member institutions. Pollard considers MetaLib an extremely powerful system in the context of consortial needs. "We license a large quantity of our e-resources to all 23 university libraries. But when it comes to content, things are always fluid and changing. MetaLib offers us the tools to accommodate this dynamic situation without having to increase staff," Pollard explains.

MetaLib is easily scalable, an important factor in handling the increasingly large pool of CSU users, which now stands at over 460,000 students, faculty, and staff.



Pollard points out, "Even if the application is good, without good tools we wouldn't be able to scale up the system and continue to support our institutions with a staff of the same size."

A Growing Relationship

From the moment CSU acquired MetaLib version 2.0 in 2003, the consortium has maintained a close, collaborative relationship with Ex Libris. "At first, when we didn't see a feature that we wanted, we'd be vocal about it," says Pollard. "Ex Libris has responded by improving functionality, expanding the knowledge base, and delivering other features that help meet our needs and goals. The company is attuned to customers like us, and we definitely view our relationship as a partnership."

After quickly rolling out MetaLib version 4.0, "CSU couldn't have been happier with the choice it made five years back," adds Pollard. "In addition to offering world-class functionality, MetaLib provides a knowledge base that has become increasingly robust over the years, making the implementation effort very worthwhile. Although previous MetaLib versions were always rich and powerful, version 4.0 is a real step up. The newly rewritten interface is easily accessible and customizable, providing innovative functionality like clusters and facets to improve searching capabilities, features that have elicited excitement from our librarians. Additionally, the new automated Upgrade Express Kit allowed us to retain all of our version 3 data in version 4."

"The system continues to get better all the time."

For a system that stirred debate before it was first introduced, MetaLib is a fixture at CSU and is expected to stay that way for a long time to come. "In our evolving world of information, people want powerful search capabilities," Pollard continues. "MetaLib is a key application that's here to stay, something I couldn't have said five years ago. And while it encountered resistance in the beginning, the system now sells itself. People see it and say they want it. MetaLib uncompromisingly delivers on our vision of 10 years ago."



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