

**Library Portal/Interface Opportunities Group** (duration 6 months)  
Commitment of ILTS Members 20% (1 day) / week

**Summary**

From the outset the Library's strategic plans for Integrated Access have included Portal initiatives as a key component. The importance of these efforts was further recognized and expanded at the December 2003 Systems Retreat where discussion focused on developing the Diffuse, Ubiquitous, Interoperable, In-Your-Face Library. A crucial conclusion was that the Library should no longer strive to become the sole "Portal of Choice" (a "forlorn hope" according to Lorcan Dempsey), but should instead work diligently to embed Library resources and services in the diverse environments where readers and researchers conduct their daily intellectual lives – course management systems, non-library portals, personal information management tools, etc., as well as library-oriented gateways. This year members of the IAC ratified this approach when they identified "improving the user experience" with Library resources and services available through the Web as the highest priority issue for consideration in the Integrated Access Council. The scope of Portal investigation and "user experience" is extremely broad, encompassing federated search, metadata harvesting, authentication, document delivery, virtual reference, citation management, and personalization, just to name a few possible areas. The Portal Opportunities Group's work will focus specifically on an examination of potential gateways to Library resources, including opportunities beyond interaction with the university's uPortal.

The Library Portal Opportunities Group will pro-actively investigate and document opportunities for library resource integration with portals and other interfaces. The team should focus priority attention on the opportunity presented to the Library by ITS's planned implementation of the Sakai open source Collaboration and Learning Environment (<http://www.sakaiproject.org/>) to replace Yale's existing course management system (<http://classes.yale.edu>).

**Group Members**

The group will include the staff currently involved in the Integrated Library Technology Services uPortal development project, the chair of the Public Interfaces Committee, and a representative from a school/departmental library. Students and Faculty should be sought out as needed to serve as consultants to the Group. Members include:

Katie Bauer  
Ann Green  
Emily Horning  
Julie Linden  
Roy Lechich  
Scott Matheson  
Karen Reardon  
Kalee Sprague (chair)

**Charge**

The group is charged to:

- 1) Investigate and document:
  - a. University/ITS interface development (including Sakai)
  - b. Library portal/interface development projects at peer institutions
  - c. Student development projects (including Yale Station)
  
- 2) Recommend specific actions and avenues for focused development

The group will produce a written report of its findings to the ILTS Research & Planning Group and to the Integrated Access Council (IAC) for discussion and review. At that point other stakeholders, including the AM&T/Library Systems Group, will be consulted to determine

feasibility of the proposed solutions. In order to encourage creative and innovative thinking, the Opportunities team will not discuss feasibility issues.

The group will survey users (faculty, students, and librarians) to determine what portals/interfaces they currently use and gain an understanding of their use, expectations and perceptions of portals and other available interfaces to gain access to Library resources. The group should investigate and use a variety of survey / assessment / feedback methods and consider this project an opportunity to gain expertise and experience in this area. The group should also consider opportunities for 'test bed' implementations as a way to prototype possible solutions.

Relationship to PIC: The report generated by this group should be used by PIC to determine short and long range goals. Although the Group will investigate opportunities for integration outside the domain of PIC (for example student portals), PIC members should be kept apprised of the results on an on-going basis.

Relationships to ITS: The ILTS uPortal Group should continue to develop collaborative relationships with ITS staff involved in portal development. The larger Portal Opportunities Group should use results from ITS surveys and committees to inform its recommendations.